

## Top 50 NextGen IBD Advisors

REP.



Methodology: Advisors on the Top NextGen Independent Broker/Dealer Advisors list are ranked exclusively by total assets under management. To be eligible, advisors had to be under the age of 40 as of Jan. 1, 2015. We solicited nominations from the top 30 IBDs by headcount, sourced from Cerulli Associates. These are the firms that responded. REP. magazine and WealthManagement.com do not receive any compensation from financial advisors, participating firms and affiliates, or the media in exchange for rankings.

RANK	NAME	FIRM NAME	AUM (\$MM)	OFFICE LOCATION (CITY, STATE)	AGE (AS OF JAN. 1, 2015)
1	<b>Mark Berger</b>	Berger Financial Group (Cambridge Investment Research)	\$650	Plymouth, Minn.	33
2	<b>James A. Cox III</b>	Harris Financial Group (LPL Financial)	\$472	Richmond, Va.	39
3	<b>Christopher Hall</b>	Wells Fargo Advisors Financial Network	\$430	Parkersburg, W.Va.	38
4	<b>Khaled Taha</b>	SAGE Private Wealth Group (Raymond James Financial Services)	\$374	Wheaton, Ill.	37
5	<b>Matthew Somberg</b>	Gottfried & Somberg Wealth Management (Commonwealth Financial Network)	\$373	Glastonbury, Conn.	37
6	<b>Christopher Krell</b>	Cassaday & Company/Royal Alliance Associates	\$352	McLean, Va.	39
7	<b>Justin Prescott Harris</b>	Cassaday & Company/Royal Alliance Associates	\$348	McLean, Va.	38

RANK	NAME	FIRM NAME	AUM (\$MM)	OFFICE LOCATION (CITY, STATE)	AGE (AS OF JAN. 1, 2015)
8	Eli Wynes	UICCU Wealth Management (Commonwealth Financial Network)	\$348	Iowa City, Iowa	33
9	Carrie Wagner	UICCU Wealth Management (Commonwealth Financial Network)	\$348	Iowa City, Iowa	35
10	Andrew Karelis	KSP Financial Consultants (Commonwealth Financial Network)	\$347	Waltham, Mass.	36
11	Mark Delp	Wells Fargo Advisors Financial Network	\$340	Santa Ana, Calif.	38
12	Craig Houck	Raymond James Financial Services	\$338	Atlanta	35
13	Joshua Gottfried	Gottfried & Somberg Wealth Management (Commonwealth Financial Network)	\$329	Glastonbury, Conn.	38
14	Nathan Fisher	Raymond James Financial Services	\$324	Cedar Rapids, Iowa	36
15	Anthony Christensen	Wells Fargo Advisors Financial Network	\$320	Louisville, Ky.	40
16	Christopher Rivers	Armstrong, Fleming & Moore (Commonwealth Financial Network)	\$277	Washington, D.C.	36
17	Jeff Dobyms	Raymond James Financial Services	\$277	Franklin, Tenn.	39
18	Dennis McGuire	Wells Fargo Advisors Financial Network	\$275	Charlestown, R.I.	38
19	Philip DeAngelo	Securities America	\$271	Highland, N.Y.	37
20	Joshua Cavett	Raymond James Financial Services	\$264	Beaumont, Texas	34

RANK	NAME	FIRM NAME	AUM (\$MM)	OFFICE LOCATION (CITY, STATE)	AGE (AS OF JAN. 1, 2015)
21	Steven Tonkinson	Tonkinson Financial (Commonwealth Financial Network)	\$261	Miami	35
22	Todd Wike	Raymond James Financial Services	\$258	Calverton, Md.	35
23	Lindsey Splendorio	Wells Fargo Advisors Financial Network	\$251	Kalamazoo, Mich.	36
24	Joseph Splendorio	Wells Fargo Advisors Financial Network	\$251	Kalamazoo, Mich.	36
25	John Westerman	Selah Financial Services (Commonwealth Financial Network)	\$245	Friendswood, Texas	31
26	Sherry Cesare	Voya Financial Advisors	\$235	Melville, N.Y.	39
27	Patrick Varney	Raymond James Financial Services	\$231	Windsor, Colo.	37
28	Scott Tobe	Signature Financial Planning (NFP Advisor Services)	\$230	Pittsburgh	36
29	Nathan Bennett	Summit Financial Group (Securian Financial Services)	\$226	San Ramon, Calif	38
30	Eric Burton	FSC Securities Corp.	\$226	Tinley Park, Ill.	38
31	Christopher Compton	Compton Financial Group (LPL Financial)	\$217	Towson, Md.	39
32	Erik Thompson	Wells Fargo Advisors Financial Network	\$215	Dublin, Ohio	40
33	James Cox	McCarthy & Cox, Retirement & Estate Specialists (Commonwealth Financial Network)	\$213	Marysville, Ohio	38
34	Michael Crews	Ricker Retirement Specialists (LPL Financial)	\$211	Garland, Texas	34

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35	Brian Hugh Vendig	Royal Alliance Associates	\$206	Farmington, Conn.	38
36	Tyson Ray	Raymond James Financial Services	\$204	Lake Geneva, Wis.	39
37	Matthew Adam Blecker	Royal Alliance Associates	\$201	Pearl River, N.Y.	35
38	David Adams	Raymond James Financial Services	\$200	Nashville, Tenn.	36
39	Jeremy Landon Keating	FSC Securities Corp.	\$196	San Diego	37
40	Brian Link	Voya Financial Advisors	\$192	Dayton, Ohio	39
41	Nathan Parkhurst	Cumberland Wealth Management (Commonwealth Financial Network)	\$190	Oak Ridge, Tenn.	33
42	David Hefty	Hefty Wealth Partners (LPL Financial)	\$185	Auburn, Ind.	37
43	Christopher Young	Cassaday & Company/Royal Alliance Associates	\$177	McLean, Va.	37
44	Jonathan Marzano	Wells Fargo Advisors Financial Network	\$176	Clemmons, N.C.	40
45	Jonathan Allen	Raymond James Financial Services	\$175	Boone, N.C.	36
46	Daniel Tresemer	OnPath Financial	\$172	St. Charles, Ill.	39
47	Shannon Staiger	SBS Retirement Consultants (Commonwealth Financial Network)	\$171	Fairbanks, Alaska	39
48	Jereme Ransick	Principled Wealth Advisors (Commonwealth Financial Network)	\$171	Covington, Ky.	38