

| Advisor name | Firm | City and contact info | Company primary business | Years of experience | Minimum portfolio | Fee structure | Total assets managed |
|---|--|---|--|---------------------|-------------------|------------------|----------------------|
| A R I Z O N A | | | | | | | |
|  Mickey Abeshaus, MD, CFP® |  | Flagstaff = 928-226-0868 mickey.abeshaus@tciwealth.com tciwealth.com | Financial Advisor | 13 | Flexible | Fee Only | \$3.1B |
|  Kyle Larson, CFP® |  | Phoenix = 480-991-0401 kyle.larson@tciwealth.com tciwealth.com | Financial Advisor | 7 | Flexible | Fee Only | \$3.1B |
|  John Stephens, MD, CFA, CFP®, MBA |  | Tucson = 520-733-1477 john.stephens@tciwealth.com tciwealth.com | Financial Advisor | 22 | Flexible | Fee Only | \$3.1B |
| C O N N E C T I C U T | | | | | | | |
| Leigh E. King, CFP®, CLU®, APMA® | King, Prell & Associates, a private wealth advisory practice of Ameriprise Financial Services, LLC | Simsbury = 860-651-5969 Leigh.e.King@ampf.com www.KingPrell.com | Financial Advisor | 30 | No Minimum | Fee Based | \$200M |
| David J. Lincoln, MSFS, ChFC, CLU, RICP, CFP® Managing Partner Chief Investment Officer | Moneco Advisors | Fairfield = 203-319-3550 david.lincoln@ipl.com https://www.monecoadvisors.com/ | Financial Advisor | 45 | Flexible | Fee Based | \$151M |
| D E L A W A R E | | | | | | | |
|  Christopher Burgos, CFP®, ChFC®, CFS, AIF® |  | Newark = 302-366-0366 christopher.burgos@dsfg.com www.dsfg.com | Financial Advisor | 21 | \$500k | Fee Based | \$1B |
| F L O R I D A | | | | | | | |
| W. Shane Hunt | Caduceus Consulting | Ponte Vedra Beach = 904-524-5907 shane@caduceusconsulting.com www.caduceusconsulting.com | Financial Advisor | 26 | \$1M | Fee Based | N/A undisclosed |
| Eliot Sokalsky | Doctors Asset Group | Fort Myers = 610-217-5077 Esokalsky@aigfl.com www.doctorsassetgroup.com | Financial Advisor | 16 | Flexible | Commission Based | N/A undisclosed |
| G E O R G I A | | | | | | | |
| Julianne F. Andrews | Atlanta Financial Associates | Atlanta = 770-261-5385 jandrews@atlantafinancial.com www.atlantafinancial.com | Financial Advisor | 32 | \$500k | Fee Based | \$850M |
| K E N T U C K Y | | | | | | | |
|  Jennifer Quire |  | Lexington = 859-538-6044 jen@wrennefinancial.com https://wrennefinancial.com/our-team/ | Financial Advisor | 13 | No Minimum | Fee Only | \$40M |
| L O U I S I A N A | | | | | | | |
| T. Craig Lewis, III CPA, CFP® | Lewis Financial Group, L.C. | Shreveport = 318-797-0447 craiglewis@lewisfinancialgroup.com www.lewisfinancialgroup.com | Financial Advisor | 47 | \$250k | Fee Based | \$50M |
| M A R Y L A N D | | | | | | | |
|  James Jaderborg, CLU®, ChFC® |  | Baltimore/Washington, D.C. 443-475-0718 james.jaderborg@northstarfinancial.com http://www.physicianwealthteam.com/ | Financial Advisor | 11 | Flexible | Fee Based | \$40M |
| M I C H I G A N | | | | | | | |
|  Charles Zhang |  | Portage = 269-385-5888 charles.zhang@zhangfinancial.com https://www.zhangfinancial.com/ | Financial Advisor | 30 | \$1M | Fee Only | \$4B |
| M I N N E S O T A | | | | | | | |
| Ben Kirchner | MD Financial Advisors | Chanhasen = 888-256-6855 ben@mdfinancialadvisors.com https://mdfinancialadvisors.com/ | Financial Advisor | 6 | No Minimum | Fee Based | \$115M |
| Josh Lantz | MD Financial Advisors | Chanhasen = 888-256-6855 josh@mdfinancialadvisors.com https://mdfinancialadvisors.com/ | Financial Advisor | 11 | No Minimum | Fee Based | \$115M |
|  Matt Morehead |  | Rochester = 507-206-2811 matt.morehead@carlsoncap.com www.carlsoncap.com | Financial Advisor | 15 | \$1M | Fee Based | \$2.3B (the firm) |
| Katherine Vessenes | MD Financial Advisors | Chanhasen = 888-256-6855 katherine@mdfinancialadvisors.com https://mdfinancialadvisors.com/ | Financial Advisor | 30 | Flexible | Fee Based | \$115M |
| N E W Y O R K | | | | | | | |
|  Ronald W. Rogé |  | Bohemia = 631-218-0077 info@rwroge.com https://www.rwroge.com/ | Financial Advisor | 35 | \$1M | Fee Only | \$300M |
|  Marian B White, CFP® AIF® |  | Tarrytown = 914-882-4974 mwhite@birchfieldllc.com https://birchfieldllc.com | Financial Advisor | 30 | Flexible | Fee Only | \$46M |
| N O R T H C A R O L I N A | | | | | | | |
|  Damon G. Lichtenberger |  | Durham = 919-908-2457 damon@northstarfinancial.com https://www.northstarfinancial.com/find_an_advisor/damon-lichtenberger/ | Financial Advisor | 18 | Flexible | Fee Based | \$100M |
| O H I O | | | | | | | |
| Kevin M. Doll, MS, CFP® | Hamilton Capital | Columbus = 614-545-4009 kmd@hamiltoncapital.com https://hamiltoncapital.com | Financial Advisor | 20 | Flexible | Fee Only | \$3B |
| Michael P. Faieta, CFP® | Hamilton Capital | Columbus = 614-545-4011 mpf@hamiltoncapital.com https://hamiltoncapital.com | Financial Advisor | 23 | Flexible | Fee Only | \$3B |
| Peter S. Geldis, MBA, CFP® | Hamilton Capital | Columbus = 614-545-4017 psg@hamiltoncapital.com https://hamiltoncapital.com | Financial Advisor | 15 | Flexible | Fee Only | \$3B |
| P E N N S Y L V A N I A | | | | | | | |
| Donald L. DeMuth | Mighty Oak Strong America Investment Company | Mechanicsburg = 717-790-9001 ddemuth@investwithmosaic.com Investwithmosaic.com | Financial Advisor | 19 | \$100K | Fee Only | \$261M |
|  Chad Chubb, CFP, CSLP |  | Philadelphia = 267-590-9533 chadchubb@wealthkeel.com https://wealthkeel.com/ | Financial Advisor | 10 | No Minimum | Fee Only | \$30M |
| P E N N S Y L V A N I A C O N T I N U E D | | | | | | | |
|  John Sklencar |  | Plymouth Meeting = 610-940-1733 info@PhysiciansWealthAdvisor.com www.PhysiciansWealthAdvisor.com | Financial Planning, Retirement Plans & Employee Benefits | 30 | Flexible | Fee Based | N/A |
| T E N N E S S E E | | | | | | | |
|  William B. Howard, Jr., ChFC, CFP |  | Memphis = 901-761-5068 whoward@whcfa.com www.whcfa.com | Financial Advisor | 42 | \$500k | Fee Only | \$240M |
| T E X A S | | | | | | | |
| Katie Brewer, CFP® | Your Richest Life | Dallas area or Virtual across the US 469-708-7975 = info@yrlplanning.com https://YourRichestLifePlanning.com | Financial Advisor | 15 | Flexible | Fee Only | \$10M |
| Bryce R. Danley, CFP® | Danley & Associates, A private wealth advisory practice of Ameriprise Financial Services, LLC | Fort Worth = 817-210-0209 bryce.r.danley@ampf.com https://www.ameripriseadvisors.com/team/danley-associates/ | Financial Advisor | 24 | No Minimum | Fee Based | \$400M |
| Adam Todd, CFP | FMP Wealth Advisers | Austin = 512-329-5174 mail@FMPWA.com www.fmpwa.com | Financial Advisor | 24 | \$1M | Fee Only | \$809M |