Mutual Funds *100 Great Financial Planners*

NAME/LOCATION FIRM	WEB SITE (WWW.)/ TELEPHONE	ASSETS MANAGED (MIL.)	ACCOUNT MINIMUM/ AVERAGE	CFP	CPA	PFS	ChFC	CLU	EA	MBA	COMMENTS
Louis Barajas Los Angeles *Louis Barajas & Associates*	btfacts.com 323-890-8180	$50	$50,000 $250,000	●					●		Focus: Hispanic Americans. "Does a great job with a market that's been historically underserved." Fee or commission.
Linda A. Barlow Santa Ana, CA *Linda A. Barlow*	— 714-953-1232	56	None $150,000	●							"A real pro at helping middle-income earners." A 21-year veteran at her own firm. Specializes in middle class, women.
David R. Bergman Marina del Rey, CA *The David R. Bergman Group*	wealthadvisorygroup .com 310-822-2618	NA	$25,000 $75,000	●				●	●		Strengths: taxes, retirement, and estate planning. "Like a surrogate husband," one widow says. Focuses on athletes.
Carl Camp Fullerton, CA *Eclectic Associates*	— 714-738-0220	160	$150,000 $500,000	●							Joined father's business in 1985. Firm uses team approach, focusing on portfolio management, retirement planning.
Dirk Edwards Portland, OR *Edwards Consulting*	edwardsconsultingllc .com 503-222-4708	622	$3,000,000 $12,000,000		●	●					Specialties: the newly wealthy, sports stars. Attorney. "The person to turn to if you get a big inheritance."
Charles Foster Del Mar, CA *Blankinship & Foster*	bfadvisors.com 858-755-5166	204	$750,000 $800,000	●							"Smart as a whip, particularly at the technical stuff." 28-year veteran. Strengths: cash-flow analysis, portfolio management.
Kathleen Kee Portland, OR *Perkins Financial Planning*	perkinsfp.com 503-221-7535	35	$500,000 $500,000	●							"Extremely patient, even with difficult clients." Client focus: doctors, wealthy, entrepreneurs. Strength in small business.
Tim Kochis San Francisco *Kochis, Fitz, Tracy, Fitzhugh, & Gott*	kochisfitz.com 415-394-6670	500	$3,000,000 $3,800,000	●						●	Specialties: stock options, executive compensation. Clients include many top executives. Attorney. "Very analytical."
J. Jeffrey Lambert Sacramento, CA *Lighthouse Financial Planning*	financialdoc.com 916-979-7888	NA	None $1,100,000	●	●						"Low-key, but direct." Ex-real estate agent. One focus: portfolio management. Runs CFP program at UC-Davis.
Michael Mignano West Linn, OR *American Express Financial Advisors*	americanexpress.com 503-650-7949	20	None $150,000	●			●	●			Former chef. "Cooks up highly individualized financial advice." Fee or commission. Strength: retirement planning.
David Morganstern Portland, OR *Capital Management Consulting*	cmcinvest.com 503-227-5284	32	$500,000 $875,000	●							Specialities include asset management, family legacies, stock options. "Really first-rate." Background in psychology.
Karen Ramsey Seattle *Ramsey & Associates*	karenramsey.com 206-324-1950	97	$300,000 $1,500,000	●							"Her work is topnotch." Key focus: financial planning for gays and lesbians. Investment management a strength.
Barbara L. Steinmetz Burlingame, CA *Steinmetz Financial Planning*	steinplan.com 650-401-3800	21	$250,000 $750,000	●					●		"Everyone's Jewish mother." Former real estate broker. Strengths: stock options, tax planning. "Really passionate."
Judy Stewart Carlsbad, CA *Stewart Financial Services*	sfsplanning.net 760-720-1785	12	None $200,000	●						●	Focuses: women, middle class. Ex-bank president. Pushes "lifestyle planning," aligning plans with attitudes and values.
Laura Tarbox Newport Beach, CA *Tarbox Equity*	tarboxequity.com 949-721-2330	125	$1,000,000 $2,000,000	●							"She takes a deep interest in her clients." Specialities include charitable planning, stock options, wealth management.
Deborah Thomas Portland, OR *Silver Oak Advisory Group*	silveroak.net 503-242-1715	65	None $900,000	●							Attorney. "Premier planner in this area." Strengths: divorce, socially conscious investing, retirement plan distributions.
Wayne Von Borstel The Dalles, OR *Von Borstel & Associates*	vonborstel.com 541-296-6669	35	$110,000 $200,000	●			●	●			Specializes in estate and retirement planning, investments. Ex-farmer. "Honesty and integrity." Fee or commission.
Bob Wacker San Luis Obispo, CA *R.E. Wacker Associates*	rewacker.com 805-541-1308	178	$250,000 $900,000	●					●		"I wouldn't hesitate to send him more clients." Focuses: wealth management, small businesses, tax and estate planning.
Glenn D. Woody Costa Mesa, CA *Glenn Woody Financial Consultants*	planretire.com 714-850-0534	100	$1,000,000 $900,000	●							Ex-broker started firm 21 years ago. "Droll humor." Focuses: retirement and estate planning. "A well-disciplined practice."
Marcee Yager San Mateo, CA *Sterling Wood Financial*	sterling-wood.com 650-372-0780	21	None $570,000	●							Teaches money course at UC-Santa Cruz. "Very humanistic, but still very accomplished on the technical side."

CREDENTIALS[1]

[1] Selected.

THE CREDENTIALS

▶ CFP Certified Financial Planner ▶ CPA Certified Public Accountant ▶ PFS Personal Financial Specialist ▶ ChFC Chartered Financial Consultant ▶ CLU Chartered Life Underwriter ▶ EA Enrolled Agent ▶ MBA Master of Business Administration