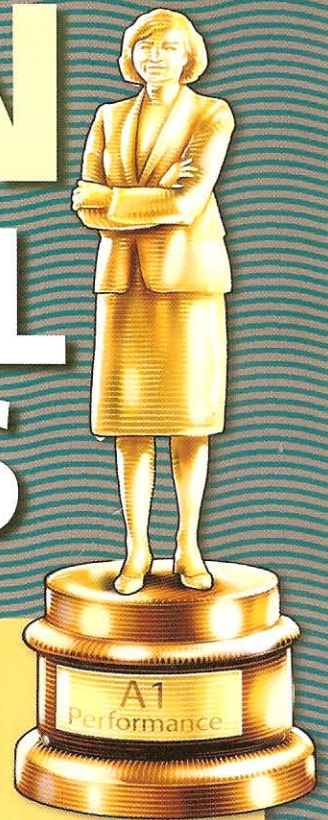


TOP 100 WOMEN FINANCIAL ADVISERS



The best advisers are doing land-office business as investors look for guidance in rocky markets. Our annual roster includes more than 20 new names. Who's the new No. 1?

The Top 100

Here are America's best female financial advisers from brokerages and banks, as identified by the Winner's Circle, a securities-industry research and consulting concern. The advisers, the firm says, follow the industry's best practices and have some of its biggest books of business. The scoring system assigns a value of 100 to the top adviser, then calculates the others by comparing each adviser with the No. 1 finisher in terms of assets under management, revenue generated and other factors. In honor of confidentiality agreements with the firms, revenue figures are not shown in the table. Total assets are those of each adviser's team and include both assets held at the firm and those held elsewhere but overseen by the team. Institutional assets are given less weight in the scoring. N indicates an adviser is new to the ranking this year.

Rank '08 '07	Name	Firm	Location	CUSTOMERS						Total Assets (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)	Score
				Individuals (Up to \$1mil)	High Net Worth (\$1-10 mil)	Ultra-High Net Worth (\$10 mil+)	Foundations	Endowments	Institutional				
62 66	Patricia Brennan	Key Financial	West Chester, Pa.	•	•				239	1-3	1-5	89.69	

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Riding High

With markets on edge, investors are rushing for advice from professionals like these. Our annual ranking.

(the following has been excerpted)

by Suzanne McGee The stock market is jumpy, credit is crunched and worries mount daily about either a recession or a spike in inflation. But that's all good news for one group: first-rate financial advisers.

Nearly three-quarters of the 78 women returning to the list from last year have managed to boost their assets under management over the past 12 months.

There's no single path to the top 100, but each of the women on the list has met stringent criteria. The ranking, assembled by the Winner's Circle organization—a securities-industry consulting concern—is based on such factors as revenue generated for the advisers' firms, assets under management, recommendations from supervisors and peers, and regulatory records. Candidates are drawn largely from brokerage houses and banks.

Investment returns are not explicitly a factor in the ranking, because the advisers don't have audited investment results. But R.J. Shook, the Winner's Circle's chief, maintains that a top adviser's abilities to attract and retain clients is indicative of strong investment results; otherwise those clients would move their money and entrust it to someone else's care. In all, he says, the advisers on the list exemplify the industry's best practices.

The Top 100

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				Individuals (Up to \$1 mil)	High Net Worth (\$1-10 mil)	Ultra-High Net Worth (\$10 mil+)	Foundations	Endowments	Institutional				
50	32 Patsy Nodilo	UBS Financial Svcs	Phoenix, Ariz.	•	•	•				454	1.5-3	3-6	91.11
51	49 Nan Salley	U.S. Trust, Bank of America	Los Angeles		•	•	•			3,159	10	50	90.86
52	39 Nan Shertzer	Merrill Lynch	Dallas	•	•	•	•		•	778	1-3	5-15	90.72
53	63 Carole Ford	LPL Financial Svcs	Fresno, Calif.	•	•	•				350	1	2	90.62
54	N Christiane Olsen	UBS Financial Svcs	New York	•	•	•				1,369	1-3+	5-10	90.50
55	N Marguerite Benson	Smith Barney	Washington	•	•	•				2,005	1-5	2.5-10	90.38
56	41 Shella Keator	Keator Group	Pittsfield, Mass.	•	•	•				417	1.5	2	90.26
57	57 Margaret Starner	Raymond James Fin Svcs	Coral Gables, Fla.	•	•	•				349	3-5	5-8	90.16
58	65 Lee Corey	Morgan Stanley	Alexandria, Va.	•	•	•	•	•		590	2-5	3-6	90.03
59	44 Lisa Chapman	UBS Financial Svcs	Long Beach, Calif.	•	•	•				321	0.75-2	2-4	89.94
60	47 Kathleen Weber	Smith Barney	Bellevue, Wash.	•	•	•				293	1-4	3-10	89.94
62	62 Patricia Brennan	Key Financial	West Chester, Pa.	•	•	•				239	1-3	1-5	89.69
64	N Deborah Danielson	Danielson Financial	Las Vegas	•	•	•				364	1-3	2-10	89.47
65	83 Anouchka Balog	Smith Barney	Laguna Niguel, Calif.	•	•	•				300	2-5	6-12	89.38
66	N Christl Edwards	Morgan Stanley	Nashville, Tenn.	•	•	•				530	1	3-10+	89.30
67	67 Debra Brede	DK Brede Inv Mgmt	Needham, Mass.	•	•	•			•	785	1-2	3-5	89.13
68	91 Barbara Noda	Deutsche Bank Alex. Brown	San Francisco	•	•	•				876	1.5	7.5	89.02
*69	N Vanessa Anderson	UBS Financial Svcs	Palo Alto, Calif.	•	•	•	•			2,000	100+	154	88.83
*70	N Jean Gannon	UBS Financial Svcs	Palo Alto, Calif.	•	•	•	•			2,000	100+	154	88.83
71	N Helen Wong	Smith Barney	New York	•	•	•				441	0.25	.25	88.72
72	48 Susan Klar	Morgan Stanley	Palo Alto, Calif.	•	•	•				450	1-15	3-20+	88.62
73	58 Lisa Petrie	UBS Financial Svcs	Long Beach, Calif.	•	•	•				319	1-15	5-25	88.52
74	62 R. Jo Kaufman	Smith Barney	Boca Raton, Fla.	•	•	•				277	1.5	3-10	88.44
*75	50 Danielle Ambrose	Merrill Lynch	Los Angeles	•	•	•				750	3-65	10-100	88.34
*76	51 Diane Hirschhorn	Merrill Lynch	Los Angeles	•	•	•				750	3-65	10-100	88.34
77	53 Diane Doolin	Smith Barney	Pasadena, Calif.	•	•	•				435	1-3+	2.5-6+	88.25
78	N Michele Huff	Banc of America Inv Svcs	Dallas	•	•	•				1,138	20	50	88.02
79	54 Kathy Tully	Morgan Stanley	Ontario, Calif.	•	•	•			•	460	0.75	4	87.90
80	N Rhonda Finby	UBS Financial Svcs	Newport Beach, Calif.	•	•	•				255	1-5	2-10	87.82
81	N Taryn Sievers	Morgan Stanley	Oakland, Calif.	•	•	•			•	600	2-10	5-10	87.69
82	79 Barbara Finder	Smith Barney	Chicago	•	•	•				300	2-5	3-10	87.60
83	85 Teresa Jacobsen	UBS Financial Svcs	Stamford, Conn.	•	•	•			•	617	2-10	5-20	87.47
84	68 Emily Bach	Morgan Stanley	Orinda, Calif.	•	•	•				810	2-4+	4-10	87.34
85	88 Susan Kingsolver	Smith Barney	New York	•	•	•			•	692	3-10	5-15	87.19
86	71 Laura Ladrigan	Morgan Stanley	Scottsdale, Ariz.	•	•	•				250	2-5	5-10	87.11
87	98 Alyssa Moeder	Merrill Lynch	New York	•	•	•			•	1,300	30-50	50-150	86.94
88	N Lynn Varndell	JPMorgan Private Client Svcs	Chicago	•	•	•				4,820	12-6	5-15+	86.80
89	N Kathleen Roeser	Morgan Stanley	Chicago	•	•	•			•	385	3-10	5-20+	86.70
90	87 Nancy Cooley	Smith Barney	New York	•	•	•			•	783	5-10	5-50	86.59
91	70 Brenda Bilsk	Spire Investment Partners	McLean, Va.	•	•	•				240	0.5-5	3-10+	86.51
92	64 Teri Conklin	UBS Financial Svcs	Northbrook, Ill.	•	•	•				500	1.5	3	86.39
93	N Susan Yelen	Smith Barney	Wilkes-Barre, Pa.	•	•	•				280	1-5	0.5-7	86.33
94	81 Wanda Austin	Smith Barney	Newport News, Va.	•	•	•				330	1-5	5-10	86.24
95	80 Marja Norris	UBS Financial Svcs	Birmingham, Mich.	•	•	•			•	530	2-5	4	86.14
96	97 Cinda Collins	RBC Wealth Mgmt	Minneapolis, Minn.	•	•	•				332	3.5-6+	7.5-12	86.07
97	99 Kathleen Malone	Wachovia Securities	Charlotte, N.C.	•	•	•				627	2-6	4-5	85.95
98	77 Patricia Carey	Smith Barney	Oklahoma City	•	•	•			•	417	2-4	5	85.86
99	100 Lisa Keverian-Press	Robert W. Baird	Lake Forest, Ill.	•	•	•				335	3-10	5-10+	85.78
100	84 Karen Ogard	Wachovia Securities	Greenwood Village, Colo.	•	•	•				213	1-3	3-10	85.71

*Partner with an adviser shown nearby on ranking. Note: For more information on the Winner's Circle and the ranking methodology, go to www.wcorg.com

Source: R.J. Shook

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