

Dental Practice

MINDING DENTISTRY'S BUSINESS **REPORT**

2011 **BEST** Financial Advisers For Dentists

FIND THE RIGHT EXPERT TO HELP YOU
ON YOUR PATH TO A SUCCESSFUL FUTURE



2011 BEST Financial Advisers

Contact Name	Firm	City/Contact Information	Min Portfolio	Association(s)	Yrs Exp	Fee/ Commission Based	Credentials/ Certifications
New Jersey							
DiQuollo, Robert J.	Brinton Eaton Wealth Advisors	Madison (800)364-2468 info@brintoneaton.com www.brintoneaton.com	500K	NAPFA, AICPA	25+	Fee Only	CFP®, CPA, PFS
Ernst, James J.	Mangan, Ernst, and Rankin Wealth Management Group	Marlton (800)613-1327 Jernst@janney.com www.merwealth.com	500K	FPA	16	Fee Based	AAMS, CMFC
Kaye, Steven W.	American Economic Planning Group, Inc.	Warren (908)757-5600 skaye@aepg.com www.aepg.com	750K	FPA, SFSP	29	Fee Based	CFP®, CLU®, ChFC®, RHU, CEBS, AAMS, CRC
New Mexico							
Lichtenberger, Damon	North Star Resource Group	Albuquerque (505)247-1800 damon.lichtenberger@northstarfinancial.com www.northstarfinancial.com	No Minimum	MDRT, NAIFA	8	Fee or Commission	CLTC
New York							
Altfest PhD, Lewis J.	Altfest Personal Wealth Management	New York (212)406-0850 lja@altfest.com www.altfest.com/dentist	500K	NAPFA, FPA, AICPA	25+	Fee Only	CFP®, CFP®, CPA, PFS
Luster, Brian	The Abernathy Group II Physician Family Office	New York (212)293-3463 BLuster@Abbygroup.com www.abbygroup.com	1M	None	10+	Fee Only	None
Schnall, Darin	Schnall Advisory Services	New York (212)967-6155 schnalladvisory@gmail.com	500K	NAPFA, AICPA	25	Fee Only	CFP®, CPA, MBA
Schwartz, Steven	Wealth Design Services Inc.	Rochester (585)442-3230 sschwartz@wealthdesignservices.com www.wealthdesignservices.com	750K	NAPFA, AICPA, RIA	10+	Fee Only	JD, CPA, PFS, RMA
North Carolina							
James, Jr., Roger A.	Parsec Financial	Asheville (828)255-0271 rjames@parsecfinancial.com	500K	None	10	Fee Based	JD, CTFA
McDonald, Con T.	Physicians Financial Services	Raleigh (919)863-2355 con@physiciansfs.com www.physiciansfs.com	Assessed per client	FPA	31	Fee Only	CFP®
Ohio							
Chasnoff, Michael J.	Truepoint, Inc.	Cincinnati (513)792-6648 m.chasnoff@truepointinc.com www.truepointinc.com	500K	NAPFA	23	Fee Only	CFP®
Leuby, William A.	Hamilton Capital Management, Inc.	Columbus (614)273-1000 wal@hamiltoncapital.com www.hamiltoncapital.com	Flexible	FPA, NAPFA	10+	Fee Only	JD, CPA, CFP®
Loftus, Douglas P.	Wealth Dimensions Group, Ltd.	Cincinnati (513)554-6000 dloftus@wealthdimensions.com www.wealthdimensions.com	500K	FPA	28	Fee Only	CFP®, AIF®
O'Dell, Jason M.	OJM Group LLC	Cincinnati (877)656-4362 odell@ojmgroup.com	500K	FPA	19	Fee Based	None
Roe, Daniel B.	Budros, Ruhlin & Roe, Inc.	Columbus (614)481-6900 droe@b-r-r.com	500K	FPA, NAPFA, IMCA	24	Fee Only	CFP®
Ruhlin, Peggy M.	Budros, Ruhlin & Roe, Inc.	Columbus (614)481-6900 pruhlin@b-r-r.com	500K	FPA, NAPFA, AICPA	30	Fee Only	CFP®, CPA, PFS
Sprenkle, Chris	Merrill Lynch	Cincinnati (513)579-3618 (800)919-3618 chris_sprenkle@ml.com	250K	CFP	17	90% Fee Based; 10% Transaction	CFP®, CRPS, CRPC, AIF
Welsh, Gene	Professional Management, Inc.	Strongsville (440)572-5522 genew@professionalmanagementinc.com www.professionalmanagementinc.com	250K	None	30	Fee Based	CPA, PFS
Oregon							
Collis, Randall	Collis Wealth Management Group/ Merrill Lynch	Eugene (541)342-5634 Randall_Collis@ml.com http://fa.ml.com/collis_group	250K	IMCA	22	Fee and Commission	CFM, CIMA®
Pennsylvania							

There are no listings for the following states: AK, AR, CT, HI, ID, KY, LA, ME, MS, MT, NE, ND, OK, RI, SD, TN, UT, VT, WV, WY