

SHOOK top wealth advisers in Virginia

The following ranking of financial advisers was compiled by Florida-based SHOOK Research LLC, which also prepares a series of state by state and national lists for Forbes.

Rank	Name	Company	City	Typical client net worth	Minimum account size for new business ¹
1	Paul Pagnato	PagnatoKarp	Reston	\$20M	\$10M
2	Joe Montgomery	Wells Fargo Advisors	Williamsburg	5-15M	5M
3	Jeff Grinspoon	VWG Wealth Management	Vienna	5-12M	1M
4	Gregory Smith	Baird	Reston	1-7M	500K
5	Simon Hamilton	Baird	Reston	1-7M	500K
6	Ryan Sprowls	Wells Fargo Advisors	Alexandria	2-25M	1M
7	Tristan Caudron	Wells Fargo Advisors	Alexandria	3-10M	1M
8	Jamie Cox	Harris Financial Group/LPL	Richmond	250K-5M	0
9	Stephan Cassaday	Cassaday & Co.	McLean	2-40M	1M
10	James Bogart	Bogart Wealth	McLean	1-35M	1M
11	Brett Hayes	Hayes Nystrom Sarrett Wealth Management Group	Richmond	1-10M	500K
12	Susan Kim	Ameriprise Financial Services	Vienna	1.5-12M	0
13	Stephen Park	UBS Wealth Management	Vienna	5-100M	5M
14	Scott Garnett	UBS Wealth Management	Richmond	1.5-5M	500K
15	Bob Parr	Morgan Stanley Private Wealth Management	McLean	5-50M	2M
16	Aashish Matani	Merrill Lynch Wealth Management	Norfolk	2.5-35M	1M
17	Mark Mellon	Edward Jones	Midlothian	1.8-5.2M	500K
18	John Gill	BB&T Scott & Stringfellow	Virginia Beach	2-50M	1M
19	Daniel G. Kleinschuster	UBS Wealth Management	Richmond	2.5-7M	100K
20	Christopher MacNamara	Merrill Lynch Wealth Management	Vienna	1.5-7M	250K
21	Brian Ford	RBC Wealth Management	Richmond	1.5-15M	1M
22	Philip Campbell	Merrill Lynch Wealth Management	Virginia Beach	3-10M	1M
23	Marc Cram	Morgan Stanley Wealth Management	Richmond	500K-5M	0
24	Jeff Eveland	Merrill Lynch Wealth Management	Leesburg	2-10M	500K
25	Allan Strange	Janney Montgomery Scott	Richmond	3-5M	0
26	Wanda Austin	Morgan Stanley Wealth Management	Newport News	1.5-6M	500K
27	Chris Aime	Baird	Reston	1-5M	250K
28	Patrick Larkin III	Wells Fargo Advisors	Leesburg	1.5-15M	1M
29	Sarah Cammiso	Merrill Lynch Wealth Management	Vienna	2.5-5M	500K
30	Justin Harris	Cassaday & Co.	McLean	2.5-10M	1M
31	Eileen O'Connor	Hemington Wealth Management	Falls Church	5-15M	3M
32	Scott Danner	Freedom Street Partners/Raymond James	Chesapeake	700K-8M	250K
33	Christopher Young	Cassaday & Co.	McLean	2.5-10M	1M
34	Eric Parker	Morgan Stanley Wealth Management	Charlottesville	2-10M	1M
35	Hanane Lemlih	Wells Fargo Advisors	McLean	10-75M	2M
36	Jeff LeClair	Wells Fargo Advisors	McLean	8-75M	2M
37	David Earl	Merrill Lynch Wealth Management	Norfolk	1-15M	1M
38	Kim Luu-Tu	Ameriprise Financial Services	Vienna	750K-13M	500K
39	Lee Corey	Morgan Stanley Wealth Management	Alexandria	5-25M	250K
40	Greg Popera	Merrill Private Wealth Management	Tysons	30-50M	10M
41	Mark Leonard	Morgan Stanley Wealth Management	McLean	5-10M	2M
42	Joe Robinson	Merrill Lynch Wealth Management	Reston	1-25M	500K
43	Gregory Watts	Morgan Stanley Wealth Management	Virginia Beach	2-3M	500K
44	Douglas Gerace	Wells Fargo Advisors	McLean	5M	500K
45	Tim Mullins	Wells Fargo Advisors	Richmond	2-40M	1M
46	Darren Mazzoni	Merrill Lynch Wealth Management	Richmond	500K-10M	500K
47	Robert Bradshaw	Merrill Lynch Wealth Management	Norfolk	250K	1M
48	Jeremy Kuhlen	The Colony Group	Richmond	2-8M	1M
49	Mark Lange	Morgan Stanley Wealth Management	Richmond	1-15M	500K
50	Ron Graft	Wells Fargo Advisors	McLean	3-8M	1M
51	Mike Kemp	UBS Wealth Management	Roanoke	2-20M	1M
52	Eddie Link	UBS Wealth Management	Roanoke	2-20M	1M
53	Jason King	Ameriprise Financial Services	Richmond	1-7M	100K
54	Nicholas Harris	Cassaday & Co.	McLean	2.5-6.5M	1M
55	Brian Jones	CJM Wealth Advisers	Fairfax	2-10M	1M
56	Carter Hotchkiss	Wells Fargo Advisors	Franklin	1.5-30M	250K
57	Carl Mahler Jr.	The Pinnacle Group/Raymond James	Midlothian	1-5M	500K
58	George Cabalu	Wells Fargo Advisors	McLean	3-10M	1M
59	Scot Morris	Raymond James Financial Services	Richmond	1-5M	500K
60	Andrew Lewis	The Lewis Financial Group	Reston	1-30M	1M
61	Brandon LaCroix	Merrill Lynch Wealth Management	Roanoke	3-15M	500K
62	Christine Emond	Ameriprise Financial Services	Fairfax	1.5-15M	0
63	Paul Mazziotti	Wells Fargo Advisors	McLean	2.5-12M	1.5M
64	Josh Mattox	Morgan Stanley Wealth Management	Roanoke	750K-2M	250K
65	Matt Chalfant	UBS Wealth Management	Vienna	4-12M	2M
66	Mike Muehr	UBS Wealth Management	Vienna	4-10M	1M
67	Pat Faulkner	Towne Wealth Management/Raymond James	Williamsburg	1-20M	1M
68	Nancy Popovich	Baird	McLean	2-25M	500K
69	John Wolff	Wealthspire Advisors	Reston	5-25M	10M
70	Emilio Sanchez	Morgan Stanley Wealth Management	McLean	1.5-10M	500K
71	John Lewis	BB&T Scott & Stringfellow	Richmond	2-10M	1M
72	Andy Rieger	Morgan Stanley Wealth Management	Alexandria	2-10M	250K
73	David Ross	Edward Jones	Fredericksburg	600K-3M	100K
74	Seth Kaplan	Morgan Stanley Wealth Management	Richmond	3-8.5M	1.5M
75	David Armstrong	Monument Wealth Management	Alexandria	5-40M	1M
76	Richard Dickerson	Merrill Lynch Wealth Management	Richmond	250K-15M	250K
77	JT Carradice	Ameriprise Financial Services	Woodbridge	2-10M	500K
78	Christopher Coffing	Merrill Lynch Wealth Management	Norfolk	1-4M	750K
79	Scott Carr	Wells Fargo Advisors	Suffolk	5-10M	1M
80	Michael Hancock	Ameriprise Financial Services	Charlottesville	500K-2M	25K
81	Robert Testwuide III	Merrill Lynch Wealth Management	Reston	4-100M	1M
82	George Gordon	Wells Fargo Advisors	Richmond	500K-10M	1M
83	Canon Hickman	Equity Concepts	Henrico	1-10M	500K
84	Rob Wood Jr.	Raymond James & Associates	Richmond	1-10M	500K
85	Khalil Andraos	Merrill Lynch Wealth Management	Reston	1-10M	250K
86	Gary Bonnewell	Morgan Stanley Wealth Management	Newport News	1-15M	1M
87	Mark Gobble	Merrill Lynch Wealth Management	Roanoke	1-15M	300K
88	Leonard Levitch	Ameriprise Financial Services	Richmond	1-10M	250K
89	Jonathan Chasen	Wells Fargo Advisors	Charlottesville	1-50M	500K
90	W. Scott Mowry	Legacy Financial Group/Raymond James	Williamsburg	2-6M	500K
91	Drew Karr	BB&T Scott & Stringfellow	McLean	10-100M	2.5M
92	John Higgins	Wells Fargo Advisors	Charlottesville	4-100M	2M
93	Kenneth Cadden	Morgan Stanley Wealth Management	Richmond	1-10M	1M
94	Kenneth Sizemore	Morgan Stanley Wealth Management	Richmond	1-10M	1M
95	Thomas Graham	Janney Montgomery Scott	Alexandria	1-12M	250K
96	Bruce Weber	Morgan Stanley Wealth Management	Virginia Beach	750K-2.5M	500K
97	Nelson Ham	Merrill Lynch Wealth Management	Charlottesville	500K-5M	250K
98	Roger Shawn	Raymond James & Associates	Richmond	1-5M	250K
99	Steve Jones	Merrill Lynch Wealth Management	Reston	4-10M	1M
100	Roger Kasch	Ameriprise Financial Services	Glen Allen	1.5-6M	250K

¹ Minium account sizes are general since it can vary depending on a range of circumstances.

The ranking, developed by SHOOK Research, is based on in-person and telephone due diligence meetings and a ranking algorithm that includes a review of best practices, client retention, industry experience, review of compliance records, firm nominations and quantitative criteria, including assets under management and revenue generated for their firms. Investment performance is not a criterion because audited records rarely exist and clients have varying risk levels. Rankings are based on the opinions of SHOOK Research LLC and are not indicative of future performance or representative of any one client's experience. Neither Virginia Business nor SHOOK Research receive any compensation in exchange for placement on the rankings list. For more information, visit SHOOKResearch.com.