



Identifying Advisors & Firms Women can Trust



2014
WOMEN'S CHOICE AWARD®
FINANCIAL

The Women's Choice Award® for Financial Advisors & Firms was created to help women identify trusted advisors and firms who provide quality service and a strong commitment to their female clientele. This program is based on 17 objective criteria. We applaud the First 100 advisors and firms that have earned this prestigious designation!

ALABAMA

Donna Cates
Ameriprise Financial Services, Inc.
Birmingham

ARIZONA

Kevin Dick
Kevin Dick Investment
Management Group
Payson

**Shepherd Wealth &
Retirement**
Tucson

CALIFORNIA

Charles Putney
Putney Financial Advisors
Walnut Creek

Diane Bourdo
The Humphreys Group
San Francisco

Diane Woodward
Oak Tree Wealth Management
San Ramon

Jeanne Bradford-Odorico
DB Wealth Management
Group, LLC
San Diego

Jeffrey Stark
LPL Financial
Lafayette

Jessica McCurdy
Ameriprise Financial Services, Inc.
San Francisco

Kimberly Foss
Empyrium Wealth
Management
Roseville

Kimberly Surber
Encore Financial Consulting
Temecula

Lisa Lockerman
Lockerman Financial Group
Newport Beach

Nina Hajjar
Stratos Wealth Partners
Irvine

Sheri May
May Wealth Management
Group
Santa Maria

CONNECTICUT

Jay Diamond
Investmark Advisory Group
Stratford

Lori Price
Price Financial Group
Wilton

FLORIDA

Brian Rockwell
Rockwell Financial Group
of Raymond James
Trinity

Craig Richman
Richman Capital Management
Boca Raton

Joanie Halfaker
Clarity For Women
Tampa

GEORGIA

Cathy Miller
Atlanta Financial Associates, Inc.
Atlanta

Jamie K. Williams
Five Talents Wealth
Management Inc.
Canton

Jennifer Calandra
Calandra Financial Group
Atlanta

Junko Horvath
Fujiyama Wealth Management
Atlanta

Roberta Goldbaugh
RTD Financial Advisors, Inc.
Atlanta

Russ Thornton
Wealthcare For Women
Atlanta

ILLINOIS

Frank Patzke
Guidant Wealth Advisors
Palatine

Gisella R. Tomasio
Ameriprise Financial Services, Inc.
Chicago

Joseph Johnson
Riverside Financial, Inc.
North Riverside

Karen DeRose
DeRose Financial
Planning Group
Chicago

MARYLAND

Amy E. Roberts
Ameriprise Financial Services, Inc.
Timonium

Elaine Shanley
Young & Company Wealth
Management Strategies, LLC
Annapolis

Lyn Dippel
FAI Wealth Management
Columbia

MASSACHUSETTS

Karla Rossetti Pippins
Riverside Wealth Management
Wakefield

Lea Ann Knight
North American Management
Boston

Louise Sharp
Sharp & Linhart Financial Strategies
Danvers

Nathaniel Tilton
Tilton Wealth Management
Waltham

Rebecca Linhart
Sharp & Linhart Financial Strategies
Marblehead

MICHIGAN

Jeffery D. Cortright
Phase 2 Investment Advisers, LLC
Jenison

Susan Vollmer-Ostertag
VIA Wealth Management, LLC
Holland

MINNESOTA

Nicole Middendorf
Prosperwell Financial
Plymouth

Sweet Financial Services
Fairmont

MISSOURI

Diane Sher
The Sher Group
St. Louis

Lori Turner
Rosetta Financial Advisors
St. Louis

Veronica Steck
Steck Wealth Management
Town and Country

Catherine Allen

M Financial Planning Services, Inc.
Marlton

Debra Taylor
Taylor Financial Group
Franklin Lakes

James E. Dy
Main Street Wealth
Management, LLC
Bedminster

Jody D'Agostini
The Falcon Financial Group, LLC
Morristown

Lassus Wherley
New Providence

Martin Higgins
Family Wealth Management
Marlton

Michelle L. Heide
Ameriprise Financial Services, Inc.
Annandale

NEW YORK

Apogee Wealth Advisors
New York

Francis Financial, Inc.
New York

FRISCH FINANCIAL GROUP, INC.
Melville

Joseph Soricelli
Family Financial NY/LPL Financial
Valhalla

Lance Drucker
Drucker Wealth Management
New York

Mary Zamboni
Zamboni & Sipes, Inc.
East Aurora

Maura Griffin
Blue Spark Capital Advisors
New York

OakWood Financial Services
Webster

NORTH CAROLINA

Dolf Dunn
Dolf Dunn Wealth Management, LLC
Huntersville

Jim Trull
Keystone Financial Partners
Cary

OHIO

PENNSYLVANIA

Donna Cheswick
Medallion Wealth Management
Sewickley

James A. Heisler
Family Wealth Services, LLC
Bensalem

James F. Notarianni
Ameriprise Financial Services, Inc.
Philadelphia

Loretta Hutchinson
Harvest Group Financial Services
Langhorne

Marianna A. Goldenberg
CURO Wealth Management
Langhorne

Melissa Motz
Motz Wealth Management
Harleysville

TENNESSEE

Gregory A. Ward
Ameriprise Financial Services, Inc.
Knoxville

TEXAS

Andrew Rutchik Gardner
Armor Wealth Management
Addison

Anne N. Spinks
Nevotti Spinks Asset Management
Conroe

Bragg Comer
Bragg Comer Financial Advisors LLC
Rockwall

Frances Rutchik Gardner
Armor Wealth Management
Addison

John A. Trusela
Ameriprise Financial Services, Inc.
San Antonio

Mitchell Kramer
Fluent Financial, LLC
Dallas

Patrick Wallace
Armor Wealth Management
Addison

Sharon Joseph
Joseph Financial Partners
Fredericksburg

JANUARY 2015

Wanda Delgado
Insight Financial Advisors
Santa Ana

COLORADO

Brandy Merriam
Ameriprise Financial Services, Inc.
Colorado Springs

Danielle Howard
Wealth By Design
Basalt

Nadia Shokohi
LPL Financial
Parker

Steve Allender
Aspen Creek Investments
Greenwood Village

Karen McGarvey
McGarvey Brown Wealth
Management
East Alton

Kathryn Allen
Allen Investments
Grayslake

Monte Luzadder
Ameriprise Financial Services, Inc.
Glenview

Susan Stevens
Stevens Wealth
Management, LLC
Deerfield

LOUISIANA

Gregory Ricks
Gregory Ricks & Associates
Metairie

NEW HAMPSHIRE

Jeffrey Keefe
Whole Wealth Management
Portsmouth

**Brophy Wealth
Management, LLC**
Bedford

NEW JERSEY

Baron Financial Group
Fair Lawn

Beverly Neal
Ameriprise Financial Services, Inc.
Marlton

Brian McDaid
Compass Point Advisors, L.P.
Montvale

Brian Bishop
Bishop Financial Advisors
Hudson

Edward Vargo
Burning River Advisory Group
Westlake

Rebecca Bar-Shain
Cedar Brook Financial Partners, LLC
Cleveland

OREGON

Julia M. Carlson
Financial Freedom Wealth
Management Group, LLC
Newport

Wayne von Borstel
von Borstel & Associates
Portland

Thomas Murphy
Murphy & Sylvest
Dallas

Wynette Stuntz
Neal Financial Group
Houston

VIRGINIA

Judy Redpath
VISTA Wealth Strategies LLC
Reston

WASHINGTON

**Harsin Wealth
Management**
Lynnwood

Congratulations to the first national financial firm to earn the Women's Choice Award!

"We are a proud partner of the Women's Choice Award and its mission of helping women identify financial advisors who provide quality service and strong commitment to their female clients. We recognize and congratulate all of our advisors who have earned this designation and can markedly distinguish themselves as leaders in the women's market."

Wayne Bloom, CEO
Commonwealth Financial Network



COMMONWEALTH *financial network*

For the full list of advisors and firms:
WomensChoiceAward.com

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