

ADVISOR PRACTICE FIRM	AVG. \$AUM PER CLIENT	AVG. # OF CLIENTS PER ADVISOR	ADVISORS TO SUP-PORT STAFF	CREDENTIALS & TOP 5 SPECIALTIES	LOCATION PHONE NUMBER
<b>Benton &amp; Company</b> Lincoln Financial Advisors	\$345,000	167	1:1	CFP RP,FP,IM,PP,FS	Denver 303.714.4748
<b>Bernie Taillon</b> Triad Financial Group	\$128,000	200	1:3	CPA RP,FP,BP,PM,CM	Greenwood Village 720.407.3011
<b>Blueprint Financial Services</b> Blueprint Financial Services	\$120,000	49	1:1	CFP RP,IM,RM,PM,CP	Arvada 303.422.7351
<b>Brown &amp; Tedstrom, Inc.</b> LPL Financial	\$2,420,000	78	2:14	CFP CM,IM,EP,RP,FS	Denver 303.863.7231
<b>BSW Wealth Partners</b> BSW Wealth Partners	\$2,600,000	50	4:4	CFP CM,IM,FP,EP,FS	Boulder 303.444.9696
<b>Capital Consulting</b> LPL Financial	\$535,000	206	4:5	CFP FP,SP,IM,RM,CM	Greenwood Village 303.793.3202
<b>Charles Tobler</b> Star Financial Services	\$345,000	20	1:1	CFP RP,FP,RM,PM,CM	Denver 303.904.0749
<b>Charlton Investment Services</b> LPL Financial	\$115,000	155	1:1	RP,WP,IM,RS,EP	Denver 303.355.5039
<b>Client Centric Consulting</b> UBS Institutional Consulting	\$2,685,000	52	4:4	CIMA RP,IM,FS,RM,AM	Denver 303.689.2649
<b>David W. Moritz and Associates</b> Ameriprise Financial	\$140,000	158	2:2	CFP RP,FP,WP,RM,CM	Greenwood Village 720.836.4534
<b>Deborah Gamber</b> Sequoia Financial Corp.	\$65,000	100	1:1	RP,WP,CP,AM,SA	Greenwood Village 303.228.7230
<b>Denver Investments</b> Denver Investments	\$2,600,00	40	6:4	CFP,CFA FP,IM,PM,CP,CM	Denver 303.312.4915
<b>Denver Retirement Partners</b> AXA Advisors	\$555,000	62	5:2	CFP,CHFC,CLU CM,IM,RP,WP,EP	Denver 720.946.4350
<b>Edward Bartholic</b> CapWest Securities, Inc.	\$300,000	10	1:1	CFP,CHFC RP,FP,IM,RS,PM	Lakewood 303.797.8991
<b>Exit and Retirement Strategies, Inc.</b> National Financial Partners	\$356,000	75	3:2	CHFC,CLU RP,WP,BP,EP,CM	Centennial 720.876.2323
<b>GHP Investment Advisors, Inc.</b> Charles Schwab & Co.	\$995,000	116	4:6	CFP,CFA,CPA RP,FP,EP,PM,CM	Denver 303.831.5000
<b>Greenspon &amp; Williams Wealth Management</b> LPL Financial	\$250,000	88	2:1	CFP RP,FP,RM,CP,CM	Greenwood Village 303.243.5728
<b>Harbor Financial Group, Inc.</b> Schwab Institutional	\$880,000	49	2:5	CFP FP,IM,RM,EP,CM	Boulder 303.939.8788
<b>Innovest Portfolio Solutions, LLC</b> Innovest	\$15,835,000	18	9:13	CIMA,CFA,CPA IM,RS,PM,CP,AM	Denver 303.694.1900
<b>Janiczek &amp; Company, Ltd.</b> Schwab Institutional	\$1,765,000	83	2:8	CFP,CHFC IM,PM,CM,RP,FP	Greenwood Village 303.721.7000
<b>Karen Ogard</b> R.W. Baird	\$750,000	125	1:2	CFP,CIMA FP,IM,PM,CM,SA	Denver 303.270.6300

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<b>Latitude Financial Group, LLC</b> Securities America, Inc.	\$85,000	137	4:1	CFP RP,BP,RS,RM,CM	Denver 720.881.8741
<b>Life Transition Planners, Inc.</b> NFP Securities, Inc.	\$500,000	35	3:1	CFP,CHFC RP,FP,EP,PM,CM	Littleton 303.933.6226
<b>The Militti Group</b> Morgan Stanley Smith Barney	\$760,000	50	3:1	RP,FP,EP,CM,AM	Omaha, NE 402.399.1513
<b>MJ Smith &amp; Associates</b> Raymond James	\$1,100,000	113	4:6	CFP,CIMA RP,FP,WP,IM,CM	Englewood 303.768.0007
<b>Nissim Lembeck Wealth Management Group</b> UBS Financial Services, Inc.	\$1,930,000	150	2:4	CIMA CS,IM,PP,EP,CM	Denver 303.820.5010
<b>Nugent Group</b> UBS Financial Services, Inc.	\$3,555,000	43	2:3	CIMA FP,PM,LM,CM,PA	Denver 303.488.3167
<b>Pann/DeYoung Wealth Management Group</b> UBS Financial Services, Inc.	\$865,000	96	2:4	CIMA RM,EP,PM,CM,AM	Colorado Springs 888.447.8259
<b>Peak Capital Investment Services, LLC</b> LPL Financial	\$455,000	200	6:3	CFP,CFA RP,FP,IM,RS,AM	Highlands Ranch 303.972.7786
<b>Rob Typher</b> Typher Financial Services, LLC	\$400,000	40	1:1	CFP RP,FP,IM,RM,CM	Highlands Ranch 303.346.0515
<b>Sharkey, Howes &amp; Javer</b> Charles Schwab	\$425,000	125	8:6	CFP,AIF,CLU RP,FP,IM,EP,PM	Denver 303.639.5100
<b>Shawn P. Fowler</b> Morgan Stanley Smith Barney	\$19,625,000	28	2:2	IM,ES,CM,AM,SA	Denver 303.446.3306
<b>Stone-Segal Wealth Management Group</b> UBS Financial Services, Inc.	\$1,570,000	38	2:1	CFP FP,EP,ES,PM,CM	Denver 303.488.3182
<b>Tochihara/Culberson</b> Morgan Stanley Smith Barney	\$520,000	100	2:1	CFP,CFA RP,FP,WP,PM,CM	Boulder 303.545.1844
<b>Tony Hartman</b> Denver Financial Group, Inc.	\$715,000	60	2:5	FP,WP,IM,CP,CM	Greenwood Village 303.220.8383
<b>The Willenbrock Group</b> UBS Financial Services, Inc.	\$1,360,000	50	2:1	CIMA RP,IM,EP,PM,CM	Denver 303.486.8981
<b>Woodward Wealth Management Group, Inc.</b> Woodward Wealth Management Group, Inc.	\$3,850,000	60	3:1	CFP RP,WP,EP,PM,CM	Greenwood Village 303.355.0556

**CREDENTIALS INDEX:**

CEP: Certified estate planner  
 CFA: Chartered financial analyst  
 CFP: Certified financial planner  
 CIMA: Certified investment management analyst  
 CAIA: Chartered alternative investment analyst  
 CPWA: Certified private wealth advisor  
 CHFC: Chartered financial consultant  
 CRPS: Chartered retirement plans specialist  
 CLU: Chartered life underwriter  
 MCEP: Master certified estate planner  
 CPA: Certified public accountant  
 AIF: Accredited Investment Fiduciary

**SPECIALTIES INDEX:**

RP: Retirement Planning  
 FP: Financial Planning  
 EP: Estate Planning  
 SP: Special Needs Planning  
 PP: Philanthropic Planning  
 BP: Business Planning  
 WP: Wealth Preservation/Insurance  
 CP: Capital Preservation  
 CM: Comprehensive Wealth Management  
 AM: Asset Allocation Management  
 PM: Portfolio Management  
 IM: Investment Management  
 RM: Risk Management  
 LM: Liability Management  
 RS: Retirement Services  
 CS: Corporate Services  
 FS: Family Office Services  
 ES: Executive Services  
 PA: Professional Athletes  
 HP: High Profiled Individuals  
 LC: Low Cost Provider  
 SA: Separately Managed Accounts