



## Barron's 2021 Top 100 Private Wealth Management Teams List

Congratulations to these 34 outstanding Private Wealth Management teams led by the Financial Advisors listed below. You are a bright example of the culture of excellence at our Firm.

**Bermont Carlin Group**  
Adam Carlin  
Richard Bermont  
Coral Gables, FL

**Pfeifler Team**  
Brian Pfeifler  
New York, NY

**545 Group**  
Gregory Vaughan  
Mark Douglass  
Jason Bogardus  
Menlo Park, CA

**Gully Schwarz Group**  
Josh Gully  
P.J. Schwarz  
Stephen Muecke  
New York, NY

**Polk Wealth Management**  
Lyon Polk  
Deborah Montaperto  
New York, NY

**Capitol Wealth  
Management Group**  
Marvin McIntyre  
A.J. Fechter  
David Gray  
Donald Metzger  
Washington, DC

**Kavallieratos  
Librett Team**  
Nicholas Kavallieratos  
Michael Librett  
New York, NY

**Team Global**  
Ron Basu  
Rachael Naylor  
Christopher Toomey  
New York, NY

**Vinder Group**  
Ron Vinder  
New York, NY

**Team 581**  
Shane Brisbin  
Michael Baumer  
Spencer Larson  
San Francisco, CA

**Fowler Bull Group**  
Shawn Fowler  
Maxwell Bull  
Denver, CO

**Griep Team**  
Troy Griep  
Robert Lesko  
Anthony Jones  
San Francisco, CA

**The Malone  
Neuhaus Group**  
Francis X. Malone  
Jon Neuhaus  
Los Angeles, CA

**The 650 Team**  
Rich Petit  
Tim Emanuels  
Steve Ashley  
San Francisco, CA

**The Continuum Group**  
Scott Siegel  
Steven Rosbash  
Joseph Carmody  
Boca Raton, FL

**The Peters Group**  
Kevin Peters  
Wenton Camporin  
Jonathan Peters  
Palm Beach, FL

**The Yu Team**  
Gillian Yu  
Catherine Fang  
San Francisco, CA

**Atlas Group**  
Scott Wilson  
Crystal Ho  
New York, NY

**The Ricca Group**  
Michael Ricca  
Mary Guza  
Florham Park, NJ

**The Connolly Group**  
Richard F. Connolly  
Ryan Connolly  
Boston, MA

**The Magellan Group**  
Richard Zinman  
Anthony Dertouzos  
John Moreno  
New York, NY

**The I Street Group**  
Brett Anthony  
H.L. "Trip" McLaughlin III  
Matthew Offen  
Washington, DC

**The MGG Group**  
Jim Martin  
John Griffin  
Chris Grandieri  
West Conshohocken, PA

**Braun/West/Elwell Group**  
Dean Braun  
Lowry West  
Dana Elwell  
Seattle, WA

**The MPW Group**  
Scott Magnesen  
Malcolm Proudfoot  
Lance Walker  
Oak Brook, IL

**The BHP Group**  
Fotios Piniros  
Andrew Hart  
Roland Breitenecker  
New York, NY

**Lechner/  
Altieri/McMahon**  
John Lechner  
Nicholas Altieri  
Terrence McMahon  
Boston, MA

**The Shadden Group**  
John Shadden  
Gary Velek  
Mike Van Dyke  
Long Beach, CA

**The 173 Group**  
Ned Gibbons  
Gerard Zell  
Menlo Park, CA

**KLT Group**  
James Klein  
Robert Lord  
Robert Thomason  
Los Angeles, CA

**The Elwaw-  
Cavalieri Group**  
John Elwaw  
Matias Cavalieri  
Miami, FL

**Goodwin Wall  
Tung Osio Group**  
Miguel Osio  
John Goodwin  
Patrick Wall  
New York, NY

**The Abacus Group**  
Shawn Rubin  
Evan Malik  
Lora Cooperman  
New York, NY

**The Opus Group**  
Grant Lee  
William Breck  
Joy Boatwright  
San Francisco, CA

Source: Barron's "Top 100 Private Wealth Advisory Teams," April 20, 2021 bases its ratings on qualitative criteria: professionals with a minimum of 7 years of financial services experience, acceptable compliance records, client retention reports, customer satisfaction, and more. Financial Advisors are quantitatively rated based on varying types of revenues and assets advised by the financial professional, with weightings associated for each. Because individual client portfolio performance varies and is typically unaudited, this rating focuses on customer satisfaction and quality of advice. The rating may not be representative of any one client's experience because it reflects a sample of all of the experiences of the Financial Advisor's clients. The rating is not indicative of the Financial Advisor's past or future performance. Neither Morgan Stanley Smith Barney LLC nor its Financial Advisors or Private Wealth Advisors pay a fee to Barron's in exchange for the rating. Barron's is a registered trademark of Dow Jones & Company, L.P. All rights reserved.