

FINANCIAL PLANNERS

RANKED BY ASSETS UNDER MANAGEMENT LOCALLY

Rank	Company Address Phone/Website	Total assets under management locally (millions)		% change	Total number of local accounts	Minimum individual account (thousands)	Portfolio analysts on staff	Compensation for services	Chief investment officer	Top local executive
		Dec. 31, 2011	Dec. 31, 2010							
1	Stratos Wealth Partners 30575 Bainbridge Road, Suite 100, Solon 44139 (866) 553-9882/www.stratoswealthpartners.com	\$3,105.0	\$1,840.0	68.8%	15,745	\$1.0	3	Fee, commission, percentage of assets under management	Daniel Jacoby	Jeffrey Concepcion CEO
2	Cedar Brook Financial Partners 5885 Landerbrook Drive, Suite 200, Cleveland 44124 (440) 683-9200/www.cedarbrookfinancial.com	\$1,590.0	\$1,540.0	3.2%	NA	NA	5	Negotiated	Peter Franz	Azim Nakhooda managing principal
3	Skylight Financial Group 1660 W. Second St., Suite 850, Cleveland 44113 (216) 621-5680/www.skylightfinancialgroup.com	\$1,307.5	\$1,390.0	-5.9%	5,000	\$0.0	NA	Fee and commission	Steven Thompson	Paul Fox president, CEO
4	Vantage Financial Group Inc. 6200 Rockside Road, Suite 100, Cleveland 44131 (216) 642-7878/www.vanfin.com	\$862.0	\$776.0	11.1%	9,000	NA	3	Fee and commission	Carl M. Ferrazza	Carl M. Ferrazza, managing partner, chief investment officer, treasurer
5	Carver Financial Services Inc. 7473 Center St., Mentor 44060 (440) 974-0808/www.carverfinancialservices.com	\$653.3	\$643.0	1.6%	2,107	\$350.0	5	Fee and commission	NA	Randy Carver president
6	212 Capital Group 22901 Millcreek Blvd., Suite 360, Highland Hills 44122 (216) 595-0123/www.212capitalgroup.com	\$635.0	\$613.0	3.6%	19,486	\$10.0	NA	Compensation for all services	Curt Lindsay Rich Sacui	Curt Lindsay managing partner
7	NCA Financial Planners 6095 Parkland Blvd., Suite 210, Cleveland 44124 (440) 473-1115/www.ncafinancial.com	\$585.6	\$465.8	25.7%	2,500	\$250.0	NA	Percentage	Dennis P. Lehman	Kevin H. Myeroff president, CEO
8	Beacon Financial Partners LLC 25800 Science Park, Suite 200, Beachwood 44122 (216) 910-1850/www.beaconplanners.com	\$564.0	\$503.0	12.1%	2,300	NA	2	Fee and commission	Dale Rubin	Gregory G. Randall managing partner
9	Raymond James Financial Services Inc. Belden 4158 Munson St. NW, Canton 44718 (330) 493-0777/www.rjebelden.com	\$440.0	\$440.0	0.0%	900	\$100.0	NA	Percentage of assets under management, based fees, trail commissions	NA	Randy McGill branch manager, owner
10	Demming Financial Services Co. 13 New Hudson Road, Aurora 44202 (330) 562-2122/www.demmingfinancial.com	\$295.0	\$278.6	5.9%	400	\$0.0	NA	Fee based	David Demming Jr	David Demming president
11	SS&G Wealth Management LLC 275 Springside Drive, Akron 44333 (330) 598-2208 /www.ssandgwealth.com	\$268.0	\$250.0	7.2%	250	\$50.0	1	Fee and commission	Carina S. Diamond	Carina S. Diamond managing director
12	HW Financial Advisors 23240 Chagrin Blvd., Cleveland 44122 (216) 378-7296/www.hwfa.com	\$266.0	\$253.0	5.1%	495	NA	5	Percentage of assets under management	Stephen L. Rudolph	Stephen L. Rudolph CIO
13	Creekside Financial Advisors LLC 30195 Chagrin Blvd., Suite 208W, Pepper Pike 44124 (216) 342-3380/www.creeksidefa.com	\$227.5	NA	NA	330	\$0.0	2	Fees and commissions	Randy S. Schneider	Nan Cohen founder
14	The Spain-Berman Financial Group of Wells Fargo Advisors 30100 Chagrin Blvd., Suite 200, Pepper Pike 44124 (216) 378-2722/www.spainberman.com	\$195.9	\$206.5	-5.1%	1,214	\$100.0	2	Asset based fees or commission	Henry "Hank" Spain Steven Berman	Henry "Hank" Spain senior vice president, investment officer
15	HFS Wealth Advisors 3866 Brecksville Road, Richfield 44286 (330) 659-7140/www.hsfwa.com	\$158.0	\$142.0	11.3%	473	\$0.0	3	Fee based	Daniel Hammer	Dennis Kelley general manager, partner
16	Storey & Associates 1360 S. Main St., North Canton 44720 (330) 526-8944/www.storeycapital.com	\$134.0	\$126.0	6.3%	100	\$0.0	NA	Fee only	Harlan G. Storey	Harlan G Storey president
17	Hudson Financial Advisors Inc. 10034 Wellman Road, Streetsboro 44241 (800) 886-5330/www.hudsonfinancial.com	\$100.0	\$90.0	11.1%	75	\$750.0	0	Fee and percentage of assets	NA	Donald J. Tharp president
18	Strategic Wealth Partners 6000 Lombardo Center, Suite 120, Seven Hills 44131 (216) 447-9318/www.swpohio.com	\$95.7	\$81.4	17.6%	135	\$250.0	5	Fee only; percentage of assets under management	Mark Tepper	Mark Tepper president
19	Redwood Financial Network Corp.(1) 30285 Bruce Industrial Parkway, Suite A, Solon 44139 (440) 287-5020/http://redwoodfn.com	\$74.2	\$0.0	0.0%	126	\$250.0	4	Fees and commission	NA	William J. Gordon, III managing director
20	Securus Financial Strategies 33595 Bainbridge Road, Suite 104, Solon 44139 (440) 349-4980 /www.securusfs.com	\$54.5	\$53.0	2.8%	250	\$50.0	NA	Fee or commission	NA	William Russo CEO
21	Bishop Financial Advisors 591 Boston Mills Road, Suite 500, Hudson 44236 (330) 342-4080/http://bishopfinancialadvisors.com	\$52.0	\$51.0	2.0%	170	\$350.0	NA	Fee based	NA	Brian Bishop owner, financial adviser
22	McGervey Wealth Management 6263 Frank Ave., NW, North Canton 44720 (330) 966-2100/www.mcgerveywealth.com	\$49.7	\$36.0	38.1%	92	\$500.0	3	Fee only	E. Michael McGervey	E. Michael McGervey president
23	True Wealth Design 150 North Miller Road, Suite 350A, Akron 44333 (330) 777-0688/www.truewealthdesign.com	\$40.1	\$27.2	47.5%	78	\$250.0	1	Fee only	Kevin Kroskey	Kevin Kroskey president
24	Roulston Investment Partners 27900 Chagrin Blvd., Suite W211, Beachwood 44120 (216) 765-0566/www.trustnavigator.com	\$40.0	\$38.0	5.3%	40	\$100.0	2	Percentage of assets under management	Thomas Roulston III	Thomas Roulston III president
25	Westlake Advisors 24960 Center Ridge Road, Suite 3, Westlake 44145 (440) 250-9744/www.westlakeadv.com	\$16.7	\$13.2	26.5%	15	\$0.0	1	Fee only	David Zolt	David Zolt owner, president, financial planner

Source: Information is supplied by the companies unless footnoted. Crain's Cleveland Business does not independently verify the information and there is no guarantee these listings are complete or accurate. We welcome all responses to our lists and will include omitted information or clarifications in coming issues. Individual lists and The Book of Lists are available to purchase at www.craincleveland.com.

(1) Redwood Financial Network Corp. was founded in 2011.