

2009 INDEPENDENT SURVEY  
TO FIND THE BEST IN  
CLIENT SATISFACTION

# *Meet the Best*

Personal Wealth Managers  
in the Pittsburgh Area

# 2009



BEST IN CLIENT SATISFACTION

# ANNOUNCING: Pittsburgh's 2009 FIVE STAR Wealth Managers.

We surveyed consumers, financial service professionals and our subscribers to find the best in client satisfaction wealth managers in the Pittsburgh area. Here they are.

Well over half of the consumer responses in the Pittsburgh area indicated it is difficult to find a wealth manager they trust and rely on <sup>(1)</sup>. Wealth managers, broadly defined, are those individuals who help you manage your financial world and/or implement aspects of your financial strategies. Common examples of wealth managers are financial advisors, life insurance agents, accountants, tax advisors, attorneys, bankers, etc.

With so many wealth managers to choose from, how do you find someone who listens to you, represents your interests and operates with an emphasis on integrity and service? PITTSBURGH MAGAZINE can help. The magazine recently formed a partnership with Crescendo Business Services, an independent research firm, to find out which wealth managers successfully satisfied key client satisfaction criteria and overall scored the highest in client satisfaction.

## The Selection Process

In November, Crescendo surveyed, by mail and phone, 41,000 high-net-worth residents in the Pittsburgh area and subscribers of PITTSBURGH MAGAZINE. An additional 6,100 surveys were sent to financial services industry professionals.

On the surveys, recipients were asked to evaluate only wealth managers whom they knew through personal experience, and to evaluate them based upon nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale service, quality of recommendations and overall satisfaction.

Only original surveys — no copies — returned in their specially designed envelopes

were accepted as valid. By December, stacks of surveys had arrived and Crescendo began carefully scoring each wealth manager. Both positive and negative evaluations were included in the scoring. Only wealth managers with five years of experience in the financial services industry were considered.

Next, each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority) and other regulatory agencies.

Then, before finalizing the list, wealth managers were reviewed by a blue-ribbon panel. The blue-ribbon panel was comprised of individuals from within the financial services industry. Although panelist comments were incorporated into the final score, safeguards were built into the review process to reduce the ability of panel members to influence the composition of the final list on the basis of company affiliation.

## Best in Client Satisfaction

The resulting list of 2009 FIVE STAR Wealth Managers represents those wealth managers in the Pittsburgh area, that scored highest in client satisfaction. These wealth managers represent less than 7 percent of the wealth managers in the Pittsburgh area. To make the list more user-friendly, wealth managers have been grouped based upon their primary financial service. Each wealth manager has also listed up to three additional financial services that they provide their clients.

Although this list will certainly be a useful tool for anyone looking for help in managing their financial world or implementing aspects of their financial strategies, it should not be considered exhaustive. Undoubtedly, there

are many other excellent wealth managers who, for one reason or another, are not on this year's list.



### RESEARCH DECLARATIONS:

As with any research or recognition program, it is important that we provide you the following declarations:

- The 2009 FIVE STAR Wealth Managers do not pay a fee to be included in the research or the final list of FIVE STAR: Best in Client Satisfaction Wealth Managers.
- The overall evaluation score of a wealth manager reflects an average of all respondents and may not be representative of any one client's evaluation.
- The FIVE STAR Award is not indicative of the wealth managers' future performance.
- Wealth managers may or may not use discretion in their practice and therefore may not manage their client's assets.
- The inclusion of a wealth manager on the FIVE STAR Wealth Manager list should not be construed as an endorsement of the wealth manager by Crescendo Business Services or PITTSBURGH MAGAZINE.
- Working with a FIVE STAR Wealth Manager or any wealth manager is no guarantee as to future investment success nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Crescendo in the future.
- The research process for the FIVE STAR: Best in Client Satisfaction Wealth Manager Program, managed by Quantitative Market Intelligence (QMI), incorporates a statistically valid sample in order to identify the wealth managers in the local market that score highest in client satisfaction. QMI does not include wealth managers on the list unless their score is statistically valid. The final list represents less than 7% of the wealth managers in the local market.
- For more information on the FIVE STAR Award and the research/selection methodology, go to: [fivestarpromotional.com/wmresearch](http://fivestarpromotional.com/wmresearch).

<sup>(1)</sup> 2009 Consumer Survey, Quantitative Market Intelligence

## FIVE STAR WEALTH MANAGERS



## BEST IN CLIENT SATISFACTION

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ACCOUNTING	ESTATE PLANNING	FINANCIAL PLANNING	FINANCIAL PLANNING	FINANCIAL PLANNING
<b>ACCOUNTING</b>	Samuel Goncz Jones Day TX, TS, WP	Kyle Baker Edward Jones EP, IN, IV	Alan Caulkins Thrivent Financial for Lutherans EP, IN, IV	James Eisnor Benchmark Financial Network IN, IV
David Delisi Delisi & Associates BP, EP, TX	Johanna Guehl Law Offices of Johanna C. Guehl AC, TX, WP	Will Baker Select Financial Group EP, IV, TX	<b>Angelo E. Cilia</b> <b>CF Advisors Group</b> BP, IV	Frank Emmerling UBS Financial Services IV
Sam Maccarone Healthcare Management Advisors TX	Gregory Harbaugh Houston Harbaugh FP, TS, WP	<b>ReShelle Barrett</b> <b>Bill Few Associates</b> IV	<b>Kenneth Como</b> <b>Bill Few Associates</b> IN, IV, LC	Christine Farrell Hefren-Tillotson IN, IV, LC
Joseph Tappe, Jr. Bielau Tierney Coon & Company BP, TX	John Harmon Lovett Bookman Harmon Marks TS, TX, WP	<b>Ahmie Baum</b> <b>UBS Financial Services</b> BP, EP, IV	J. Victor Conrad PINNACLE Financial Strategies EP, IN, IV	Gregory Farrell Hefren-Tillotson IN, IV, LC
David Wilke Wilke & Associates BP, EP, TX	Scott Keffer Wealth Transfer Solutions CG, IN, TX	Denise S. Bogden Morgan Stanley Smith Barney EP, IN, IV	August Consiglio Consiglio Financial Group IN, IV, LC	Trevor Fawley Ameriprise Financial EP, IN
<b>BANKING</b>	James Lange Lange Financial Group AC, FP, WP	Richard P. Bondi, Jr. Morgan Stanley Smith Barney IN, IV, LC	Daniel Costa BCR Financial Services EP, IN, IV	Mike Fertig Fragasso Financial Advisors CG, IN, IV
F. Robert Collins Dollar Bank	Jerry Lodovico Benchmark Financial Network CG, FP, IN	Sara Botkin Morgan Stanley Smith Barney BP, EP, IV	Andrew J. Costanzo, Jr. Andrew J. Costanzo Jr. & Associates BK, IN, IV	Michael W. Figurelli Ameriprise Financial BP, EP, IV
<b>BUSINESS PLANNING</b>	John F. Meck Eckert Seamans - Cherin & Mellott BP, TX, WP	Ralph Boyd, Jr. Allegheny Financial Group EP, IV	Greg Daily Fragasso Financial Advisors IN, IV, LC	<b>Ruth A. Forsyth</b> <b>Advisors Group of Pittsburgh</b> IN, IV, LC
Robert A. Galanter Rothman Gordon BK	Sara Mercer Thorp Reed and Armstrong CG, TS, WP	Paul J. Brahim BPU Investment Management EP, IV, TX	Louis D'Angelo Raymond James Financial Services EP, IV	<b>Ward Garner</b> <b>Bill Few Associates</b> EP, IN, IV
Lawrence N. Paper Lawrence N. Paper, Attorney EP, TS, WP	Jim Schindler Schindler Financial Services BP, IN, LC	Amy Braun-Bostich Ameriprise Financial BP, EP, IV	<b>Gil Davis, Jr.</b> <b>Hefren-Tillotson</b> AC, IV, TX	Ronald Geisler LPL Financial/The Advisors IN, IV, LC
<b>ESTATE PLANNING</b>	<b>FINANCIAL PLANNING</b>	<b>John R. Brown III</b> <b>Bill Few Associates</b> EP, IN, IV	Scott Deaton Mosaic Consulting BP, EP, IV	Thomas Geisler Thomas A. Geisler & Company BP, IV, TX
Mark Bookman Lovett Bookman Harmon Marks TS, TX, WP	Andy Alexander Raymond James Financial Services IN, IV	Harry E. Butson Mosaic Consulting BP, IN, IV	Peter D. Dochinez Trustmont Financial Group EP, IN, IV	Timothy Gottus Guyaux Mandler Mah Financial Group BP
<b>Thomas Butz</b> <b>Smith Butz</b> BP, TS, WP	Frank A. Amato Amato Financial Services IN, IV, LC	<b>Carl Buzzeo</b> <b>Ameritas Investment Corp.</b> IN, IV	Brian Donley Summit Investment Advisors EP, IN, IV	Deborah Graver Fragasso Financial Advisors CG, EP, IN
Mary Jo Corsetti Williams Coulson Attorneys at law BP, TX, WP	<b>John M. Angiulli</b> <b>New York Life Securities</b> EP, IN, IV	Michael Alan Campbell Conditionomics EP, IN, LC	Mike D'Onofrio Prudential EP, IN, IV	Costas Grekis CUNA Brokerage Services BP, EP, IV
Doug Denardo Rothman Gordon CG, TS, WP	<b>Rick Applegate</b> <b>First CommonWealth Financial Advisors</b> BK, IV, TS	Kurt E. Carlson Hefren-Tillotson CG, IN, IV	Ralph Duckworth Allegheny Financial Group EP, IV, TX	<b>Edwin Grinberg</b> <b>Lionshead Financial Planning Company</b> BP, EP, IN
Emanuel DiNatale Alpern Rosenthal TX	Ed Aufman Aufman Associates EP, IV	Michael A. Carretta Ameriprise Financial EP, IV	Brian S. Eagon Morgan Stanley Smith Barney IV	<b>Meyer "Skip" Grinberg</b> <b>Luttner Financial Group</b> BP, IN, LC
Christopher Farrell Cohen & Grisby CG, TS, TX		Cara Caruso Morgan Stanley Smith Barney EP, IN, IV		
Bruce Gabler Cohen & Grisby BP				

FIVE STAR WEALTH MANAGERS



BEST IN CLIENT SATISFACTION

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FINANCIAL PLANNING	FINANCIAL PLANNING	FINANCIAL PLANNING	FINANCIAL PLANNING	FINANCIAL PLANNING
Dave W. Groetsch Morgan Stanley Smith Barney BK, IN, IV	Paul J. Koepfer Summit Financial Advisors EP, IN, IV	<b>David Lutz, Jr.</b> <b>The Advisors Group of Pittsburgh</b> <b>BK, IN, IV</b>	Scott F. Purcell Innovative Benefits Consulting EP, IN, LC	James A. Smith ING Financial Partners EP, IN, IV
William Gullborg Wealth Management Resources BP, EP, IV	<b>Steven Kohler</b> <b>D.B. Root &amp; Company</b> <b>BP, EP, IV</b>	John Mackie Hefren-Tillotson EP, IN, IV	Alan Rank Morgan Stanley Smith Barney EP, IN, IV	Karl G. Smrekar, Jr. Allegheny Financial Group EP, IN, IV
Jason M. Harrison Hefren-Tillotson EP, IN, IV	Glenn Kolod Edward Jones EP, IV, TS	Anthony L. Mastro Northwestern Mutual BP, EP, LC	Patrick Reidy The Parkridge Group EP, IV	<b>Edward G. Snyder</b> <b>Bill Few Associates</b> <b>EP, IN, IV</b>
Rush Hodgins Ameriprise Financial EP, IN, IV	Joseph Kovacic Riverfront Financial IN, IV, LC	Roman A. Matusz Financial Designs BP, IN, IV	Richard Reynolds Janney Montgomery Scott EP, IN, IV	Donald P. Speakman The Speakman Financial Group EP, IN, IV
James O. Hohman Allegheny Financial Group BP, EP, IV	Robert Kovalchik Ameriprise Financial EP, IV	Craig Mc Roberts Hefren-Tillotson IN, IV	Sean Ries MR Financial Group EP, IN, IV	Megan L. Spear Ameriprise Financial EP, IN, IV
Steven Hurst Allegheny Financial Group EP, IN, IV	Kevin C. Krul Hefren-Tillotson EP, IN, IV	Kiersten McCort Ameriprise Financial EP, IN, IV	<b>David Root, Jr.</b> <b>D.B. Root &amp; Company</b> <b>BP, EP, IV</b>	<b>Kenneth L. Spencer</b> <b>Ameriprise Financial</b> <b>BP, EP, IV</b>
Edward Ifft, Jr. Ifft & Palmer Associates EP, IN, IV	Anthony Kulesza Ameriprise Financial EP, IV, LC	James Meredith Hefren-Tillotson EP, IN, IV	Mark J. Rychel BCR Financial Services BP, EP, IV	<b>Melissa Stein</b> <b>H Financial Management</b> <b>BP, EP, IV</b>
Clifford Johnson Ameriprise Financial IN	<b>Eilizabeth Kusen</b> <b>Genworth Financial Security Corp.</b> <b>BP, IN, LC</b>	Steven J. Miller Trebuchet Consulting EP, IV, TX	<b>Michael Sabo</b> <b>Raymond James Financial Services</b> <b>IV, TX</b>	Gary A. Storie First Commonwealth Financial Advisors BP, EP, IV
<b>H.L. Bud Kahn</b> <b>Wealth Management Strategies</b> <b>EP, IV, LC</b>	Steve Kutlenios Allegheny Financial Group IN, IV, LC	William Miller Hefren-Tillotson EP, IN, IV	<b>Richard Sabo</b> <b>Money Concepts Capital Corp</b> <b>EP, IV, TX</b>	Jeffery C. Suhayda Ameriprise Financial BP, EP, IV
Margaret Kanaan Hefren-Tillotson EP, IN, IV	Carol K. Lampe Lampe Asset Management EP, IV, LC	James W. Monteverde The Monteverde Group EP, IN, IV	<b>Leo Scalercio</b> <b>Ameriprise Financial</b> <b>EP, IN, IV</b>	Marc L. Tannenbaum Signature Financial Planning BP, EP, IV
George M. Kapusta Kapusta Financial Group BP, EP, IV	Robert Lauver The Equity Advisor Group EP, IN, IV	Michael Montileone Allegheny Financial Group EP, IV	Jared Scholl Ameriprise Financial EP, IN, IV	Brian Tarquinio UBS Financial Services CG, IV
<b>Michael K. Kauffelt II</b> <b>Bill Few Associates</b> <b>EP, IV</b>	<b>Paul J. Lecker II</b> <b>Ameriprise Financial</b> <b>EP, IN, IV</b>	<b>John Murray</b> MR Financial Group EP, IN, IV	Jennifer Schrauder Allegheny Investments BP, EP, IV	Richard L. Tidball T & D Advisors IV
Jeffrey Kelley Ameriprise Financial EP, IN, IV	<b>Edward Lewis</b> <b>Integrated Financial Management</b> <b>AC, IV, TX</b>	<b>Michael T. Muslin</b> <b>The Advisors Group of Pittsburgh</b> <b>EP, IN, IV</b>	Raymond Schutzman Allegheny Financial Group EP, IN, IV	Craig Tillotson Hefren-Tillotson EP, IV
J Kevin Kelly Merrill Lynch IV	Kenneth Lippencott Ameriprise Financial EP, IV, LC	<b>Jim Nelson</b> <b>Nelson Financial Services</b> <b>EP, IN, IV</b>	Fern Schwartz Merrill Lynch EP, IV	Willard Tillotson, Jr. Hefren-Tillotson EP, IV, LC
Kerry A. Kelly, Jr. Morgan Stanley Smith Barney EP, IN, IV	Michael Lloyd Ameriprise Financial EP, IN, LC	Diane M. Peason Legend Financial Advisors BP, EP, IV	Howard L. Shear Prudential IN, IV	Scott Tobe Signature Financial Planning EP, IN, IV
Aaron Kingston Morgan Stanley Smith Barney EP, IN, IV	<b>Margery Loevner</b> <b>UBS Financial Services</b> <b>IV</b>	Neil H. Pettes Individual Financial Services IN, IV, LC	Mary Ann Siebert Hefren-Tillotson EP, IN, IV	Matthew E. Tremaine Ameriprise Financial EP, IV, TS
	<b>Joseph W. Lucchino</b> <b>NY Life Securities/ Eagle Strategies</b> <b>EP, IN, IV</b>	Edward Poach Ameriprise Financial EP, IN, IV	Belynda D. Slaugenhaupt Hefren-Tillotson CG, EP, IV	Lisa Turbeville Watermark Financial EP, IV, TX

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FINANCIAL PLANNING	INSURANCE	INVESTMENTS	INVESTMENTS	INVESTMENTS
Deborah Turek Allegheny Financial Group EP, IV	Ted Evans Allstate Financial Services FP	Christopher Butsko UBS Financial Services EP, FP, IN	Robert Fragasso LPL Financial BP, EP, FP	Matthew Hurray Merrill Lynch FP, IN, TS
John Tweardy Tweardy and Associates IN, IV, LC	Mitchelle Letwin Northwestern Mutual BP, IV, LC	Otto Chu Chu Financial Management Corporation	Paul Frey Wells Fargo Advisors, LLC	Jonathan Isaacson Wells Fargo Advisors, LLC
Stuart Valen AXA Advisors IN, IV, LC	Joseph J. McCann, Jr. Mass Mutual Financial Group CG, IV, LC	<b>Carrie Coghill-Kuntz D.B. Root &amp; Company BP, EP, FP</b>	Peter Geiringer UBS Financial Services FP, IN	Charles J. Petredis Wells Fargo Advisors, LLC/Petredis Investment Advisors
<b>Barbara Brown Virany Morgan Stanley Smith Barney IN, IV, LC</b>	David Tobin Luttner Financial Group BP, EP, LC	John Cognetti Merrill Lynch BK, FP, IN	Stephen Gierl Gierl Augustine & Associates FP	David Jancisin Merrill Lynch BK, EP, FP
<b>Alison Wertz Bill Few Associates EP, IN, IV</b>	<b>INVESTMENTS</b>	Christopher J. Compton UBS Financial Services/ Stonegate Wealth Management	Mark Goldberg UBS Financial Services EP, FP	Charles Johnson Janney Montgomery Scott EP, FP, TS
<b>Jeanette White LPL Financial Consultant/The Grandview Group EP, IV</b>	Michael Abbott Merrill Lynch IN, LC, TS	Curt Coulter UBS Financial Services EP, FP, IN	<b>Brian Gongaware McKinley Carter Wealth Services FP, TS</b>	Dane Johnston Edward Jones IN, LC, TS
Steve Wilde Morgan Stanley Smith Barney IV	Tod Arbutina Cottrill Arbutina Financial Services BP, FP, TX	Richard Crist Janney Montgomery Scott EP, FP, IN	Miguel Gonzalez, Jr. Prudential IN, LC	Richard Junker Wells Fargo Advisors, LLC
Roselyn Wilkinson MD&A Financial Management Company IN, IV, LC	<b>Glenn Armocida UVEST Financial Services Group BK, IN, LC</b>	Lori Jo Daff-Siggins Merrill Lynch EP, FP, IN	Karen Greb Merrill Lynch BK, FP, TS	Robert Kanters Morgan Stanley Smith Barney BK, FP
<b>Thomas Windfelder Allegheny Investments/ TBROOKS Financial Services BP, IV</b>	Frank Ausk, Jr. Principal Financial Group EP, IN	Adam Davidson Hefren-Tillotson CG, FP, IN	Galen Greiner Janney Montgomery Scott FP, IN, LC	Steven Kantz The Advisors Group of Pittsburgh FP, IN, LC
William S. Wolf Wolf Financial BP, EP, IV	John Barbour InterGen Advisors FP, IN, LC	William Davis Morgan Stanley Smith Barney FP, IN	James Grimes BenchMark Financial Network BP, EP, FP	<b>Vince Kasievich Stifel Nicolaus &amp; Company EP, FP, LC</b>
<b>Gaye Wood Morgan Stanley Smith Barney EP, IV</b>	David Barnhorst Morgan Stanley Smith Barney BK, IN	<b>Beth D. DeSimone Schneider Downs Wealth Management Advisor EP, FP, IN</b>	<b>Edward Harris Harris Wealth Management EP, FP, TX</b>	Allen Kiessling Merrill Lynch IN, TS
Christopher Woods Jefferson Financial Group BP, EP, IN	Allen Belice UBS Financial Services FP, IN	Donald F. Detts, Jr. Janney Montgomery Scott EP, FP	Karen Hartley Morgan Stanley Smith Barney EP, FP, IN	Brian Koble Hefren-Tillotson
Roger Zahn Principal Financial Group IN, IV, LC	Michael Blehar Fort Pitt Capital Group FP	Raymond Dinkel PNC Investments EP, FP	Donald Hastings Merrill Lynch CG, EP, FP	David Koenig Beaconsfield Financial Services CG, FP, IN
Harvey L. Zeve H.L. Zeve Associates BP, IV	Ted Bovard Fort Pitt Capital Group FP	Dale Dominick Benchmark Financial Network FP, IN, TS	<b>Brian Heberle Wells Fargo Advisors, LLC</b>	Charles Koliass Wells Fargo Advisors, LLC
<b>INSURANCE</b>	Alan M. Breedlove Morgan Stanley Smith Barney BK, FP, IN	Joseph C. Feola Morgan Stanley Smith Barney EP, FP	Daniel Henderson Cookson Peirce & Company FP	Paul Kostyak Hefren-Tillotson EP, FP, TX
Richard Chura Economic Concepts EP, FP, IV	Edward C. Brown UBS Financial Services EP, FP, IN	<b>Steve Fischetti Morgan Stanley Smith Barney BP, EP, FP</b>	<b>David W. Hoffmann D.B. Root &amp; Company BP, FP, IN</b>	Mark A. Kovacs BPU Investment Management FP, IN, LC
	Thomas R. Butler Allegheny Financial Group BP, FP, TX		David Hunter Hunter Associates FP	<b>Betty L. Lamb Morgan Stanley Smith Barney EP, FP, IN</b>

FIVE STAR WEALTH MANAGERS



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INVESTMENTS	INVESTMENTS	INVESTMENTS	INVESTMENTS	INVESTMENTS
Mark Lane Pennsylvania Financial Group EP, FP, IN	Scott Miller Private Wealth Advisors BP, EP, FP	<b>Peter Schlicht</b> <b>Janney Montgomery Scott</b> BP, EP, FP	James J. Stossel Woodbury Financial Services FP	Kathleen Wright Kathleen S. Wright & Associates
Jon Lantz First Commonwealth Financial Advisors BK	Stuart M. Miller Private Wealth Advisors BP, EP, FP	John M. Schneider Private Wealth Advisors BP, EP, FP	Peter Strope UBS Financial Services FP, IN, LC	Matthew Yanni Yanni & Associates Investment Advisors
J. Stephen Lee H.L. Zeve Associates FP	<b>Abraham Moosa</b> <b>Janney Montgomery Scott</b> EP, FP, IN	Adam Scholl Henry H. Armstrong Associates CG, EP, FP	William Stroyne William J. Stroyne Financial Services EP, FP, IN	Herbert Zehinder UBS Financial Services EP, FP, LC
Richard Lewis Lewis McBeth & D'Ambrosio FP, IN	<b>Lee Oleinick</b> <b>UBS Financial Services</b> EP, FP, IN	<b>Michael Scoletti</b> <b>Morgan Stanley Smith Barney</b> FP	<b>Deborah A. Sullivan</b> <b>Morgan Stanley Smith Barney</b> CG, FP, IN	<b>LONG-TERM CARE</b>
John Lisowski Stifel Nicolaus & Company EP, LC, TS	Toni Ondek Morgan Stanley Smith Barney FP, IN, LC	<b>Joseph Seymour</b> <b>Wells Fargo Advisors, LLC</b>	Kim Tillotson-Fleming Hefren-Tillotson CG, EP, FP	<b>E. Shel Yetman</b> <b>The Yetman Agency</b> EP, FP, IN
<b>Katherine Loch</b> <b>Ameriprise Financial</b> FP, IN	Brian Osborn Absolute Capital FP, TS	Kenneth Sharon Merrill Lynch CG, EP, FP	Todd Todorich Merrill Lynch FP, LC, TS	<b>TAXATION</b>
James Lowden UBS Financial Services FP	<b>Joseph Petruska</b> <b>Bill Few Associates</b> BP, EP, FP	Russell Shered Morgan Stanley Smith Barney FP	Bruce Trushel PNC Investments IN, LC	Thomas Golden Kinol Sharie Leyh & Associates AC, BP, EP
Jeffrey Lowden UBS Financial Services FP	<b>Mark F. Pittman</b> <b>Wells Fargo Advisors, LLC/Pittman-Priola &amp; Associates</b>	Greg Shutok Stifel Nicolaus & Company EP, FP, IN	Thomas H. Walker PNC Investments IN	<b>LeRoy L. Metz II</b> <b>Metz Lewis</b> BP, EP, WP
William Luttner UBS Financial Services EP, FP	Vincent Richard Evans Janney Montgomery Scott FP	<b>Nancy Skeans</b> <b>Schneider Downs Wealth Management Advisor</b> EP, FP, TX	James Wallisch Raymond James Financial Services FP	<b>TRUST SERVICES</b>
<b>Nancy Lynch</b> <b>Wells Fargo Advisors, LLC</b>	Patricia Rogus Morgan Stanley Smith Barney BP, EP, FP	Eric V. Sluss Ameriprise Financial EP, FP, IN	James Wehrheim Wehrheim Financial Services FP, IN, LC	<b>H. Scott Cunningham</b> <b>PNC Wealth Management Group</b> BK, FP, IV
Darla Main Main Advisory CG, FP, LC	Kenneth Ross Morgan Stanley Smith Barney BP, EP, FP	John Snyder Station Capital IN	J. Andre Weisbrod <b>Staar Financial Advisors</b> FP	Robert Cupp WesBanco Trust EP, FP, IV
Peter F. Mathieson Guyasuta Investment Advisors EP, FP, TS	<b>Frank Ruscetti</b> <b>Harvest Financial Corporation</b> BP, CG, FP	John Soika AIG Retirement Advisors FP, IN, LC	Richard Weiss Ameriprise Financial FP, IN, LC	Robert Y. Kopf Smithfield Trust Company EP, FP, IV
Jayne Merideth Hefren-Tillotson EP, FP	Christine Saitta Morgan Stanley Smith Barney EP, FP, IN	Louis P. Stanasolovich Legend Financial Advisors BP, EP, FP	Michael Weissman Merrill Lynch FP	<b>WILL PREPARATION</b>
Jason Messick Harvest Financial Corporation FP	Joe Salamone Benchmark Financial Network EP, FP, IN	Jonathan Stevens Kades-Margolis EP, FP, IN	Wade Wilson Merrill Lynch FP, IN, TS	Kenneth Lewis Fox Rothschild Attorneys At Law EP
Richard Meyer Guyasuta Investment Advisors BP, FP	Joseph Scarpo Private Wealth Advisors BP, EP, FP	Doug Stirling Janney Montgomery Scott EP, FP, IN	<b>James R. Wiltman</b> <b>Wells Fargo Advisors, LLC</b>	
<b>Fred C. Miller</b> <b>Hunter Associates</b> FP			Andrew Wolfinger Morgan Stanley Smith Barney CG, EP, FP	

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