

WEALTH MANAGERS

Name	Company name •Headquarters •Website •E-mail	Barron's California rank	Total team assets	Typical account size	Typical client net worth	Contact info •Phone/fax
Bob Klein	J.P. Morgan Securities Inc. New York jpmorgan.com	35	\$500 million	\$1.5 million	\$5 million	888 San Clemente Drive, Ste. 200 Newport Beach 92660-6368 (949) 718-6100
Laila Pence	Pence Wealth Management Newport Beach pencewealthmanagement.com anne.godfrey@lpl.com	61	\$635 million	\$2 million	\$5 million	5000 Birch St. Newport Beach 92660-2127 (949) 660-8777/(949) 660-8778
Trudy Haussmann	Haussmann Financial Inc. Newport Beach haussmannfinancial.com kristy@haussmannfinancial.com	63	\$840 million	\$500,000	\$1.5 million	4590 MacArthur Blvd., Ste. 390 Newport Beach 92660-2074 (949) 250-4973/(949) 251-0629
Tom Blanchfield	Bank of America Merrill Lynch New York ml.com	78	\$1.36 billion	\$25 million	\$35 million	4695 MacArthur Court Newport Beach 92660-1882 (949) 955-6000
Marc Foster	UBS Financial Services Inc. New York ubs.com/financialservicesinc	93	\$660 million	\$3 million	\$10 million	888 San Clemente Drive, Ste. 400 Newport Beach 92660-6369 (949) 760-5308
Sid Miramontes	UBS Financial Services New York ubs.com/financialservicesinc	94	\$286 million	\$750,000	\$1.5 million	555 Pointe Drive Brea 92821-3651 (949) 256-5492

Source: Barron's California Top Advisers list of 100 wealth managers in the state
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To learn more, please contact Steve Economos
at 360 Commercial Partners today, 949.296.3607.