

WEALTH MANAGERS: TOP CALIFORNIA ADVISERS

Name	Company name •Headquarters •Website •E-mail	Barron's rank	Total team assets	Typical account size	Typical client net worth	•Address •Phone/fax
Laila Pence	Pence Wealth Management Newport Beach pencewealthmanagement.com anne.godfrey@lpl.com	31	\$898 million	\$2 million	\$5 million	5000 Birch St., Ste. 7600 Newport Beach 92660-8111 (949) 660-8777/(949) 660-8778
Marc Foster	UBS Financial Services Inc. New York ubs.com/financialservicesinc marc.foster@ubs.com	100	\$772 million	\$4 million	\$10 million	888 San Clemente Drive, Ste. 400 Newport Beach 92660-6369 (949) 467-6079/(855) 211-4498

WEALTH MANAGERS: INDEPENDENT FINANCIAL ADVISERS

Name	Company name •Headquarters •Website •E-mail	Barron's rank	Total team assets	Typical account size	Typical client net worth	•Address •Phone/fax
Doug Allison	Beacon Pointe Advisors LLC Newport Beach bpadvisors.com info@bpadvisors.com	60	\$4.54 billion	\$7 million	\$15 million	24 Corporate Plaza, Ste.150 Newport Beach 92660-7965 (949) 718-1600/(949) 718-0601
Feroz Ansari	Compak Asset Management Newport Beach compak.com	68	\$575 million	\$500,000	\$2 million	1801 Dove St. Newport Beach 92660-2403 (800) 388-9700/(877) 454-5591
Laila Pence	Pence Wealth Management Newport Beach pencewealthmanagement.com anne.godfrey@lpl.com	90	\$859 million	\$2 million	\$5 million	5000 Birch St., Ste. 7600 Newport Beach 92660-8111 (949) 660-8777/(949) 660-8778

Source: Barron's California Top 100 Advisors list (February 2013) and Top 100 Independent Financial Advisors (August 2012)
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SEE WHAT OTHERS DON'T.

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WEALTH MANAGERS: WOMEN FINANCIAL ADVISERS

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Name	Company name •Headquarters •Website •E-mail	Barron's rank	Total team assets	Typical account size	Typical client net worth	•Address •Phone/fax
Laila Pence	Pence Wealth Management Newport Beach pencewealthmanagement.com anne.godfrey@lpl.com	13	\$850 million	\$2 million	\$5 million	5000 Birch St., Ste. 7600 Newport Beach 92660-8111 (949) 660-8777/(949) 660-8778
Trudy Haussmann	Haussmann Financial Inc. Newport Beach trudy.haussmann.sarep.com erin@haussmannfinancial.com	30	\$854 million	\$530,000	\$980,000	4590 MacArthur Blvd., Ste. 390 Newport Beach 92660-2074 (949) 250-4973/(949) 251-0629
Anouchka Balog	Morgan Stanley Smith Barney LLC New York morganstanleyfa.com	85	\$469 million	\$3 million	\$8 million	28202 Cabot Road, Ste. 500 Laguna Niguel 92677-1271 (949) 365-1775/(949) 365-5398
Janice Hobbs	LPL Financial Services Orange janhobbs.com janice.hobbs@lpl.com	92	\$490 million	\$3 million	\$5.5 million	1 City Blvd. W., Ste. 1125 Orange 92868-3606 (714) 938-3700/(714) 938-1230

Source: Barron's Top 100 Women Financial Advisors list (June 2012)
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