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# Medical Economics

NOVEMBER 10, 2015

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2015

## Best Financial Advisers

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## 2015 BEST FINANCIAL ADVISERS FOR DOCTORS

Contact Name	Firm	City & Contact Info	Credentials, Certifications and Degrees	Minimum Portfolio	Association(s)	Assets Managed	Yrs Exp	Fee and/or Commission Based
<b>New Jersey continued</b>								
Grande, Traudy	Wells Fargo Advisors Financial Network	Oakhurst • 732-531-4111 Traudy.grande@wfaafinet.com www.grandefinancialservices.com	CFP®	\$250K	FSI	\$200M	33	Fee Based
Hook, Howard	EKS Associates	Princeton • 609-921-1016 hhook@eksassoc.com www.eksassoc.com	CFP®, CPA	No Minimum	FPA	\$75M	19	Fee Only
Kaye, Steven W.	AEPG Wealth Strategies	Warren • 908-757-5600 www.aepg.com	AAMS®, AIF®, CFP®, ChFC®, CEBS, CLU®, RHU	\$750K	FPA, SFSP	\$800M	30+	Fee Based
Mahmood, Jamal L.	Access Wealth Planning, LLC	Roseland • 973-740-2400 jmahmood@awplan.com www.awplan.com	ChFC®, CFP®, CLU®	Flexible	None	\$25M	15+	Fee Based
Moyer, Thomas	MACRO Consulting Group	Parsippany • 973-451-9400 info@macroconsultinggroup.com www.macroconsultinggroup.com	CFP®	\$750K	FPA	\$133M	22	Fee and Commission Based
Picariello, Brian M.	Traust Sollus Wealth Management, LLC	Princeton • bpicariello@tswealth.com www.tswealth.com	CFA, PFS, CPA	\$2M	FPA, AICPA, CFA Institute	N/A	16	Fee Based
Schapiro, Ken	Condor Capital Management	Martinsville • 732-356-7323 info@condorcapital.com www.condorcapital.com	CFA, MBA	\$250K	CFA Institute	\$850M	27	Fee Only
Sebastian, David K.	The Physicians Wealth Management Group	Summit • 908-608-9800 dsebastian@physicianswealth.com www.physicianswealth.com	AAMS®, CFP®	\$1M	FPA	\$100M	36	Fee and Commission Based
Spagnoletti, Jr., Nicholas	MACRO Consulting Group	Parsippany • 973-451-9400 info@macroconsultinggroup.com www.macroconsultinggroup.com	CFP®	\$750K	FPA	\$122M	25	Fee and Commission Based
<b>New Mexico</b>								
Flandermeyer, Travis	The Doctor's Financial Resource	Albuquerque • 505-717-1111 www.doctorsfinancialresource.com travis@ceteranetworks.com	MBA	No Minimum	FPA, FSI	\$45M	7	Fee Based
<b>New York</b>								
Abernathy, Steven	The Abernathy Group II Physician Family Office	New York • 212-293-3469 www.physicianfamilyoffice.org	None	\$2.5M	None	\$125M	30+	Fee Only
 Keller, Lawrence B.		Woodbury • 800-481-6447 516-677-6211 www.physicianfinancialservices.com	CFP®, ChFC®, CLU®, RHU	No Minimum	FPA, MDRT, NAIFA, SFSP	N/A	25	Fee and Commission Based
Mustico, Michael	The Mustico Financial Group, Inc.	Elmira • 607-733-7935 www.musticofinancial.com	JD, CPA	\$100K	None	\$100M+	16	Fee Based
Rogé, Ronald W.	R.W. Rogé & Company, Inc.	Bohemia • 631-218-0077 info@rwroge.com • www.rwroge.com	CFP®, MS	\$1M	FPA, NAPFA	\$240M	29	Fee Only
White, Marian B.	LEXCO Wealth Management	Tarrytown • 914-468-8902 mwhite@lexcowealth.com www.lexcowealth.com	CFP®, MBA	\$750K	FPA	\$40M	20+	Fee Based

There are no listings for the following states, AK, AR, HI, ID, ME, MS, MT, NV, ND, SD, VT, WV, WY