

WINNIE SUN AMONG TOP WOMEN FINANCIAL ADVISORS ATTENDING BARRON'S WINNER'S CIRCLE SUMMIT

*Exclusive Event Hosts Wealth Management Leaders and
Industry Influentials*



NEW YORK (December 18, 2007)—Winnie Sun, Vice President of Wealth Management at Smith Barney in Irvine, California recently attended the second annual “Top Women Advisors Summit” hosted by Barron’s magazine and R.J. Shook, author of “The Winner’s Circle” books rating

America’s top financial advisors. The invitation-only conference on the business of delivering wealth management for high-net-worth individuals and institutions was held at The Breakers in Palm Beach, Florida from November 28-30.

The conference was attended by 84 of the Top 100 women financial advisors in the U.S., as ranked by R.J. Shook and published in Barron’s June 11, 2007 issue. These elite advisors led breakout sessions that explored current issues in wealth management –from developing a team and compensation issues, to incorporating philanthropy as a service, to target marketing and client segmentation strategies.

“It was a real honor to be a part of this elite event, and meet others who share the same integrity and passion for our profession,” Sun said. “Discussing best practices one-on-one with the top women financial advisors in the country was a unique experience, and I’m excited to bring these insights back to my firm and my clients.”

Winnie Sun was one of 416 women financial advisers who were designated as the top annual producers of their firms. Firms sending attendees included A.G.Edwards, Ameriprise, Credit Suisse, Deutsche Bank, LPL Financial Services, Merrill Lynch, Morgan Stanley, Royal Alliance Associates,

Inc., Robert W. Baird & Co., Smith Barney, UBS, and Wachovia Securities, among others.

“We were pleased to bring together the top women financial advisors for our second annual event, with the common goal of improving the performance of the financial services industry,” said Ed Finn, editor and president of Barron’s. “These women are at the top of their game, and we were thrilled to provide a platform for them to share their challenges, philosophies and success stories with other top performers.”

R.J. Shook noted that, “Scores of Winner’s Circle advisors have told me that once they’ve reached the top of their firms, there are fewer people – oftentimes no one – to share ideas with. For this reason, we’re bringing the ‘best of the best’ women together again to share ideas and discuss how to keep raising the bar for their practice, and for the industry.”

The Summit was sponsored by AIG Private Client Group, AIM Investments, Allianz Global Investors, Barclays iShares, BlackRock, Calamos, Dow Jones Wealth Manager, DWS Scudder, Eaton Vance Managed Investments, Evergreen Investments, Franklin Templeton Investments, Frenkel & Co., Inc., The Hartford Mutual Funds, JanusINTECH, Legg Mason, Mainstay Investments, MFS Investment Management, Natixis Global Associates, Nuveen Investments, OIC The Options Industry Council, Putnam Investments, Rolls-Royce Motor Cars, Schroders, Sentinel Investments, Vanguard, and Van Kampen Investments.

The Top 100 Women Financial Advisors article from the June 11 issue of Barron’s can be read for free at: www.barrons.com/top100women and www.barrons.com/top100women2; the complete list of the Top 100 Women is accessible here: http://barronsmarketing.com/public/Barrons_Top_Women_list.pdf

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About Barron's

Barron's (www.barrons.com) is America's premier financial magazine, renowned for its market-moving stories. Published by Dow Jones & Company since 1921, it reaches an influential audience of senior corporate decision makers, institutional investors, individual investors and financial professionals. With new content available every week in print and every business day online, Barron's provides readers with a comprehensive review of the market's recent activity, coupled with in-depth, sophisticated reports on what's likely to happen in the market in the days and weeks to come. As a result, Barron's is the financial information source these powerful people rely on for market information, ideas and insights they can use to increase their professional success and enhance their personal, financial well-being.

About R.J. Shook

Through exhaustive, in-depth studies in the financial services industry, R.J. Shook has developed a unique expertise in identifying success patterns and characteristics of the industry's top producers. Since September 2002, he has published a yearly ranking of the top advisors in America. A frequent contributor to business periodicals and the author a numerous books on the subject, Mr. Shook is a recognized authority on best practices in the financial services industry. He frequently gives speeches, conducts workshops and leads panel discussions on topics and issues of concern to financial services professionals and their organizations to which they belong. For more information, go to www.WCorg.com.

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