

The Winner's Circle: The Bay Area's Top 25 Women Wealth Advisers

Rank ¹	Adviser Firm Address Phone	Advises clients with investable assets of:			Foundations	Endowments	Small bus.	Typical account size (millions) ²	Typical net worth (millions) ³	Team total assets ⁴
		<\$1mm	\$1mm-\$10mm	>\$10mm						
1	Lorna Meyer Merrill Lynch & Co. 101 California St., Ste. 2100, San Francisco 94111 (415) 288-2519		✓	✓	✓			\$25-\$50	\$100+	\$1,650,000,000
2	Dagmyr Maidman Lehman Brothers 555 California St., 30th Floor, San Francisco 94104 (415) 263-3300		✓	✓			\$30	\$50+		\$1,700,000,000
3	Gwen Campbell UBS Financial Services 555 California St., 32nd Floor, San Francisco 94104 (415) 963-5222		✓	✓			\$10+	\$10+		\$1,100,000,000
4	Debbie Jorgensen Merrill Lynch & Co. 600 California St., 8th Floor, San Francisco 94108 (415) 955-3700		✓	✓	✓	✓	\$10-\$50+	\$20-\$100+		\$950,000,000
5	Stacy Grant Merrill Lynch & Co. 101 California St., Ste. 2100, San Francisco 94111 (415) 288-2524			✓	✓		\$25-\$50	\$50-\$75		\$2,900,000,000
6	Siri Berg Credit Suisse 650 California St., 31st Floor, San Francisco 94108 (415) 249-2048		✓	✓	✓		\$5-\$10	\$10-\$20		\$840,000,000
7	Stephanie Twomey Cit Family Office 2882 Sand Hill Road, Ste. 200, Menlo Park 94025 (650) 234-5122		✓	✓	✓		\$6	\$15-\$25		\$762,000,000
8	Barbara Noda Deutsche Bank Alex. Brown 101 California St., 46th Floor, San Francisco 94111 (415) 617-2800	✓	✓	✓			\$1.5	\$7.5		\$876,000,000
9	Susan Klar Morgan Stanley 245 Lytton Ave., Ste. 200, Palo Alto 94301 (650) 853-4052	✓	✓	✓			\$1-\$15	\$3-\$20+		\$450,000,000
10	Taryn Sievers Morgan Stanley One Kaiser Plaza, Ste. 900, Oakland 94612 (510) 891-0567	✓	✓	✓	✓	✓	\$2-\$10	\$5-\$10		\$600,000,000
11	Emily Bach Morgan Stanley 2 Theatre Square, Ste. 322, Orinda 94563 (925) 253-5322	✓	✓	✓			\$2-\$4+	\$4-\$10		\$810,000,000
12	Jeanette Garretty Wells Fargo Investments 301 University Ave., Ste. 300, Palo Alto 94301 (650) 752-0418		✓	✓	✓	✓	\$8-\$15	\$15+		\$900,000,000
13	Lori Whitney Smith Barney 411 Borel Ave., Ste. 220, San Mateo 94402 (650) 358-1857	✓	✓	✓	✓		\$1-\$5	\$3-\$15		\$984,000,000
14	Ying Zhang Morgan Stanley 1333 N. California Blvd., Ste. 133, Walnut Creek 94596 (925) 939-5100	✓	✓	✓	✓	✓	\$3	\$10		\$170,000,000
15	Holly Ruxin Morgan Stanley 555 California St., Ste. 1400, San Francisco 94104 (415) 576-2644		✓	✓			\$15	\$50-\$100		\$272,000,000
16	Sara Saxe UBS Financial Services 2800 Sand Hill Road, Ste. 100, Menlo Park 94025 (650) 233-7000	✓	✓	✓			\$3	\$7.5		\$296,000,000
17	Eileen Murray Smith Barney 1 Sansome St., 37th Floor, San Francisco 94104 (415) 984-6907	✓	✓	✓			\$1-\$5	\$1-\$6		\$560,000,000
18	Hilary Giles [^] Merrill Lynch & Co. 333 Middlefield Road, Ste. 202, Menlo Park 94028 (650) 473-2043		✓	✓			\$25	\$80		\$1,350,000,000
19	Suzanne Killea [^] Merrill Lynch & Co. 333 Middlefield Road, Ste. 202, Menlo Park 94028 (650) 473-2042		✓	✓			\$25	\$80		\$1,350,000,000
20	Jan Lambert Lambert and Associates 2817 Crow Canyon Road, Ste. 206A, San Ramon 94563 (925) 820-0538	✓	✓	✓	✓		\$0.875	\$2-\$5		\$241,000,000
21	Maha Matta Smith Barney 555 California St., 37th Floor, San Francisco 94104 (415) 955-1591		✓	✓			\$10	\$25		\$1,150,000,000
22	Theo Schwabacher Morgan Stanley 101 California St., 3rd Floor, San Francisco 94111 (415) 693-6000	✓	✓	✓	✓	✓	\$3-\$6	\$10		\$325,000,000
23	Jean Gannon UBS Financial Services 775 Page Mill Road, Palo Alto 94304 (650) 496-7400		✓	✓	✓		\$100+	\$154		\$2,000,000,000
24	Miriam Graham Rose Cit Private Bank 1 Sansome St., 24th Floor, San Francisco 94104 (415) 627-6093		✓	✓			\$5	\$25		\$2,000,000,000
25	Michelle Carey Wells Fargo Investments 2001 North Main St., Ste. 410, Walnut Creek 94596 (925) 274-0542	✓	✓	✓			\$1.5	\$3-\$5		\$200,000,000

Printed with permission by the Winner's Circle LLC, owner of the copyright, with the understanding that the Winner's Circle registered trademark and copyrighted material and rights are protected. This may not be published outside the SFBT without written consent from the Winner's Circle LLC. ¹Investable assets, excluding primary residence; ²^ indicates 5% or more of adviser's business. ³Total team assets include custodied and non-custodied assets that adviser and team advise. Adviser is ranked on individual assets, or percentage of contribution to team; some individuals on list are not part of teams and assets reflect only their share. Different weightings are assigned to different types of assets. ⁴Ranking algorithm includes revenues produced, but is not published. ⁵Account size and net worth refer to individual business, not institutional; net worth includes primary residence. Note: ^ ^ represent partners. The Winner's Circle is an organization independent of the firms involved and does not receive compensation from the over 100 participating firms or affiliates, financial advisers or the media in exchange for ranking purposes. Each adviser on this year's List was filtered down from a national list of securities firms, banks, independent firms and more. The Winner's Circle vetted each Series 7 registered adviser through a host of quantitative and qualitative criteria, including assets managed, revenues, experience levels, acceptable compliance records and U4 forms, discussions with management and more. Because client portfolios are typically unaudited, portfolio performance is not a criteria; instead, the Winner's Circle focuses on customer satisfaction and client retention. The Winner's Circle is a registered trademark of the Winner's Circle LLC. For more information about the Winner's Circle or to nominate an adviser, visit www.wcorg.com.