

# BUFFALO BUSINESS FIRST

## T H E L I S T

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# FINANCIAL PLANNING FIRMS

RANKED BY ASSETS UNDER WNY MANAGEMENT

	Name/ prior (*new or not ranked)/ URL	Address	Value of assets under WNY management	CFPs	Brokers	CFAs	Financial advisers	Top local executive(s)
10	<b>Charles Schwab &amp; Co.</b> ⑨ schwab.com	8118 Transit Rd. Buffalo, NY 14221 716-810-1190	\$2.01 billion <sup>1</sup>	2	5	0	4	Philip Hofmeister phil.hofmeister@schwab.com
11	<b>Courier Capital LLC</b> ⑩ couriercapital.com	1114 Delaware Ave. Buffalo, NY 14209 716-883-9595	\$1.7 billion	3	0	3	8	Thomas Hanlon thanlon@couriercapital.com
12	<b>Sandhill Investment Management</b> ⑬ sandhill-im.com	40 Fountain Plz. Buffalo, NY 14202 716-852-0279	\$1.5 billion	1	0	2	7	Edwin Johnston emj@sandhill-im.com
13	<b>Nottingham Advisors</b> ⑫ nottinghamadvisors.com	100 Corporate Pkwy. Amherst, NY 14226 716-633-3800	\$1.2 billion	1	0	3	0	Tom Quealy tom.quealy@nottinghamadvisors.com Lawrence Whistler larry.whistler@nottinghamadvisors.com
14	<b>Trubee Collins &amp; Co. Inc.</b> * trubeeollins.com	1 M&T Plz. Buffalo, NY 14203 716-849-1401	\$1.04 billion	1	15	1	14	William Pictor wpictor@trubeeollins.com
15	<b>First Aurora Financial Group</b> ⑭ firstaurorafinancialgroup.com	634 Main St. East Aurora, NY 14052 716-655-7600	\$1 billion	3	12	0	12	Richard Bisesi Donald Eustice Jeffrey Kamien Ronald Olson
16	<b>Arbor Capital Management</b> ⑰ arborcapitalmgt.com	100 Corporate Pkwy. Amherst, NY 14226 716-446-9111	\$972 million	1	0	2	2	Gerald Cole Lawrence McGowan ltmcgowan@arborcapitalmgt.com Daniel Toole dmtoole@arborcapitalmgt.com
17	<b>WNY Asset Management / Spectrum Wealth Management</b> ⑱ wnyasset.com	6500 Sheridan Dr. Williamsville, NY 14221 716-626-0060	\$960.06 million	8	0	0	4	Robert Castiglione Ronald Lojaco John Lunghino John Pieroni
18	<b>Sgroi Financial LLC</b> ⑰ sgroifinancial.com	965 Union Rd. West Seneca, NY 14224 716-674-6700	\$950 million	2	19	0	12	John Clouden johnc@sgroifinancial.com Patrick Sgroi pats@sgroifinancial.com
19	<b>The Financial Guys</b> ⑭ thefinancialguys.com	305 Spindrift Dr. Williamsville, NY 14221 716-633-1515	\$900 million	1	16	2	16	Michael Lomas mlomas@nextfinancial.com Glenn Wiggle gwiggle@nextfinancial.com
20	<b>PPS Retirement Advisors</b> ⑳ ppsadvisors.net	8660 Sheridan Dr. Williamsville, NY 14221 716-204-0170	\$850 million	1	1	0	3	Robin Tomasula
21	<b>Sanderson Wealth Management LLC</b> ⑲ sandersonllc.com	50 Fountain Plz. Buffalo, NY 14202 716-566-2420	\$707.44 million	6	0	1	2	John Sanderson jsanderson@sandersonllc.com
22	<b>Jensen Marks Langer &amp; Vance LLC</b> ㉑ jmlvwealthplanning.com	360 Delaware Ave. Buffalo, NY 14202 716-362-0170	\$703 million	4	10	1	9	Cynthia Vance cvance@jmlvwealthplanning.com
23	<b>Dopkins Wealth Management LLC</b> ㉒ dopkinswealthmanagement.com	200 International Dr. Williamsville, NY 14221 716-634-8800	\$690.41 million	3	0	0	6	Thomas Emmerling temmerling@dopkins.com
24	<b>Northwestern Mutual</b> ㉓ buffalo.nm.com	5488 Sheridan Dr. Williamsville, NY 14221 716-626-4500	\$600 million	8	24	2	24	Mark Schnobrich mark.schnobrich@nm.com
25	<b>Georgetown Capital Group</b> ㉔ georgetowncapital.com	5350 Main St. Williamsville, NY 14221 716-633-9800	\$550 million	0	7	0	4	Joseph Curatolo jcuratolo@georgetowncapital.net

<sup>1</sup> 2018 numbers