

BUFFALO BUSINESS FIRST

T H E L I S T

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RANKED BY ASSETS UNDER WNY MANAGEMENT

Name/ Prior (*new or not ranked)/ URL	Address	Assets under WNY management	CFPS	Brokers	CFA	Financial advisers	Top local executive		
23 WNY Asset Management LLC / CPA Financial Network ²³ wnyasset.com	6500 Sheridan Drive Williamsville, NY 14221 716-626-0060	\$430 million	5	0	1	7	John Pieroni, Robert Castiglione, Ronald Lojaco		
24 Ogorek Wealth Management LLC ²⁴ ogorek.com	6400 Sheridan Drive Williamsville, NY 14221 716-626-5000	\$320 million			2	0	0	Tracy Sherwood, tracy.sherwood@ogorek.co Anthony Ogorek, tony@ogorek.com	
25 Schroeder Braxton & Vogt Inc. ²⁵ sbvfinancial.com	1412 Sweet Home Road Amherst, NY 14228 716-634-6113	\$288.54 million			4	0	0	4	Richard Schroeder, richard@sbvfinancial.co Steven Elwell, selwell@sbvfinancial.com, Rosanne Braxton, rbraxton@sbvfinancial.co
26 Clearplan Financial Inc. ²⁶ clearplanfinancial.com	4735 Southwestern Blvd. Hamburg, NY 14075 716-312-7424	\$285 million			2	6	0	6	Robert Kloss, rkloss@clearplanfinancial.co
27 Carter Financial Management LLC ²⁷ carterfinancialmanagement.com	6470 New Taylor Road Orchard Park, NY 14127 716-662-2110	\$280 million			1	6	0	6	Ray Carter, rac@carterfinancialmanagement.com
28 United Capital ²⁸ unitedcpbuffalo.com	374 Delaware Ave. Buffalo, NY 14202 716-332-1964	\$272 million			3	4	0	0	Mimi Schanzlin, mimi.schanzlin@unitedcp.co Peter Grogan, peter.grogan@unitedcp.co, Kelly, will.kelly@unitedcp.com
29 McCollum Christoferson Group ²⁹ McCollum-Christoferson.com	500 Corporate Parkway Amherst, NY 14226 716-854-5400	\$239.09 million			1	3	1	3	Katherine Christoferson, kchristoferson@mccollum-christoferson.co
30 Robshaw & Julian Associates Inc. ³⁰ robshawjulian.com	6255 Sheridan Drive Amherst, NY 14221 716-633-6555	\$170 million			0	0	1	3	Stephen Robshaw, Ronald Roche, James Julli info@robshawjulian.com
31 Miller Gesko ³¹ millergesko.com	237 Main St. Buffalo, NY 14203 877-852-7628	\$155 million			1	0	1	4	Paul Gesko, prgesko@millergesko.com
32 National Wealth Management LLC ³² nwm.wfadv.com	747 Hopkins Road Williamsville, NY 14221 716-585-3013	\$150 million			1	0	0	3	Derek Bock, dbock@wfaifinet.com
32 Prosperity Wealth Management ³² ProsperityWM.com	8201 Main St. Williamsville, NY 14221 716-633-8000	\$150 million			0	3	0	3	Lauren Gidley, lauren@prosperitywm.com, L Buehler, ljb@summitwmi.com, Douglas Schu dts@summitwmi.com
34 Sage Investment Group ³⁴ sageig.com	1967 Wehrle Drive Williamsville, NY 14221 716-929-2427	\$134 million			2	8	0	10	John Penna, jpenna@sageig.com, Joel Morawski, jmoraski@sageig.com, Louis Rive lrivera@ae.cadaretgrant.com, Sandra Barr sbarry@cadaretgrant.com
35 ROI Financial Group ³⁵ roifinancialgroup.com	8685 Sheridan Drive Williamsville, NY 14221 716-568-4800	\$132 million			1	6	0	9	David Oestreicher, doestreicher@nyl.com, M Rosenthal, mirosenthal@ft.newyorklife.co Christopher Naugle, cnaugle@nyl.com
36 Moshides Financial Group ³⁶ moshidesfinancial.com	65 Bryant Woods South Amherst, NY 14228 716-636-2525	\$130 million			2	0	0	2	John Moshides, jcm@moshidesfinancial.co
37 Waterford Advisors LLC ³⁷ waterfordadv.com	6225 Sheridan Drive Williamsville, NY 14221 716-580-3906	\$126 million			3	0	0	0	Gregory Kozerski, glk@waterfordadv.co
38 Waring Financial Group ³⁸ waringfinancialgroup.com	38 Lake St. Hamburg, NY 14075 716-648-2412	\$116 million			2	0	0	3	Thomas Waring Jr., twaring@waringfinancialgroup.com
39 Landmark Wealth Management ³⁹ landmarkfirm.com	45 Bryant Woods North Amherst, NY 14228 716-630-2417	\$115 million			2	0	2	4	Mark Collard, mark@landmarkfirm.com, Bri Laible, brian@landmarkfirm.com
40 Southtowns Financial Group Inc. ⁴⁰ familyvalu.com	3438 Orchard Park Road Orchard Park, NY 14127 716-662-0070	\$107 million			2	3	0	3	Christopher Hull, chris@familyvalu.com
41 Michael Emser Wealth Management Group Inc. ⁴¹ emserwealth.com	2306 Wehrle Drive Williamsville, NY 14221 716-633-1999	\$62 million			1	1	0	1	Michael Emser, memser@unitedplanners.co
42 Hafner Financial Group ⁴² hafnerfinancial.com	2813 Wehrle Drive Williamsville, NY 14221 716-650-4151	\$50 million			1	3	0	2	Peter Hafner, peter@hafnerfinancial.com

