

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	CFA	Financial advisers	Top local executive(s)
21	Jensen Marks Langer & Vance LLC ⁽²¹⁾ jmlvwealthplanning.com	360 Delaware Ave. Buffalo, NY 14202 716-362-0170	\$475 million	3	7	0	7	Cynthia Vance cvance@jmlvwealthplanning.com
22	Clearplan Financial Inc. ⁽²⁶⁾ clearplanfinancial.com	6470 New Taylor Rd. Orchard Park, NY 14127 716-312-7424	\$465 million	3	12	0	12	Ray Carter rac@clearplanfinancial.com Robert Kloss rkloss@clearplanfinancial.com
23	WNY Asset Management LLC ⁽²²⁾ wnyasset.com	6500 Sheridan Dr. Williamsville, NY 14221 716-626-0060	\$452 million		6		8	1 John Pieroni Robert Castiglione Ronald Lojaco
24	Georgetown Capital Group ⁽²³⁾ georgetowncapital.com	5350 Main St. Williamsville, NY 14221 716-633-9800	\$450 million	0	5	0	5	Joseph Curatolo jcuratolo@georgetowncapital.net
25	Northwestern Mutual ⁽²⁴⁾ buffalo.nm.com	5488 Sheridan Dr. Williamsville, NY 14221 716-626-4500	\$391 million	6	0	0	40	Mark Schnobrich mark.schnobrich@nm.com
26	S.C. Parker & Co. Inc. ⁽²⁷⁾ scparker.com	5892 Main St. Williamsville, NY 14221 716-632-6800	\$350 million	2	9	0	9	NA
27	Ogorek Wealth Management LLC ⁽²⁵⁾ ogorek.com	6400 Sheridan Dr. Williamsville, NY 14221 716-626-5000	\$312 million	2	0	0	0	Tracy Sherwood tracy.sherwood@ogorek.com Anthony Ogorek tony@ogorek.com
28	Raymond James & Associates ⁽²⁷⁾ raymondjames.com/buffalo-branch/	468 Delaware Ave. Buffalo, NY 14202 716-768-3379	\$300 million	1	3	0	3	Lisa Walsh lisa.walsh@raymondjames.com
29	Level Financial Advisors ^(*) levelfa.com	1412 Sweet Home Rd. Amherst, NY 14228 716-634-6113	\$270 million	5	0	0	0	Richard Schroeder Steven Elwell Rosanne Braxton Michael Heburn
30	McCollum Christoferson Group ⁽³¹⁾ mccollum-christoferson.com	500 Corporate Pkwy. Amherst, NY 14226 716-854-5400	\$267 million	1	0	1	3	Katherine Christoferson kchristoferson@mccollum- christoferson.com
31	Waterford Advisors LLC ⁽³⁷⁾ waterfordadv.com	6225 Sheridan Dr. Williamsville, NY 14221 716-580-3906	\$250 million	3	0	0	0	Gregory Kozerski glk@waterfordadv.com
32	McDermid Financial Group ^(*)	37 Franklin St. Buffalo, NY 14202 716-834-3156	\$225 million	0	12	0	14	NA
32	United Capital ⁽²⁹⁾ unitedcpbuffalo.com	374 Delaware Ave. Buffalo, NY 14202 716-332-1960	\$225 million	2	3	0	3	Mimi Schanzlin mimi.schanzlin@unitedcp.com Peter Grogan peter.grogan@unitedcp.com
34	Robshaw & Julian Associates Inc. ⁽³³⁾ robshawjulian.com	6255 Sheridan Dr. Amherst, NY 14221 716-633-6555	\$170 million	3	0	1	3	Stephen Robshaw Ronald Roche James Jullian Courtney Robshaw
35	Prosperity Wealth Management ⁽³⁴⁾ prosperitywm.com	8201 Main St. Williamsville, NY 14221 716-633-8000	\$165 million	0	3	0	3	Lauren Gidley Luke Buehler Douglas Schutte
36	Miller Gesko ⁽³⁵⁾ millergesko.com	237 Main St. Buffalo, NY 14203 877-852-7628	\$160 million	1	0	0	3	Robert Miller, Jr bmiller@millergesko.com
36	Moshides Financial Group ⁽⁴⁶⁾ moshidesfinancial.com	65 Bryant Woods S. Amherst, NY 14228 716-636-2525	\$160 million	1	2	0	3	John Moshides jcm@moshidesfinancial.com
38	Southtowns Financial Group Inc. ⁽³⁸⁾ familyvalu.com	3438 Orchard Park Rd. Orchard Park, NY 14127 716-662-0070	\$110 million	3	3	0	3	Daniel Blake dan@familyvalu.com
39	Lumsden & McCormick Financial Services LLC ⁽³⁹⁾ lumsdencpa.com	369 Franklin St. Buffalo, NY 14202 716-856-3300	\$100 million	1	9	0	9	John Schiavone David Schlein