

BUFFALO BUSINESS FIRST

THE LIST

LARGEST BUFFALO FINANCIAL PLANNING FIRMS

RANKED BY VALUE OF ASSETS UNDER WNY MANAGEMENT

	Name/ prior (*new or not ranked)/ URL	Address	Value of assets under WNY management	CFPs	CFAs	Financial advisers	Top local executive(s)
1	Merrill Lynch Wealth Management ①	50 Fountain Plz. Buffalo, NY 14202 716-849-2121	\$15 billion	23	1	73	Jeffrey Smith Robert Walter
2	Equitable Advisors ② empirestate.axa-advisors.com	350 Essjay Rd. Williamsville, NY 14221 716-626-2507	\$10.05 billion	38	0	313	Lou Nucherenlo louis.nucherenlo@equitable.com Michael Peters
3	MassMutual New York State ③ ny-state.massmutual.com	300 Corporate Pkwy. Amherst, NY 14226 716-852-1321	\$8 billion	9	0	135	Joseph DiLeo jdileo@financialguide.com
4	RBC Wealth Management ⑦ us.rbcwealthmanagement.com/buffalo	6225 Sheridan Dr. Williamsville, NY 14221 716-635-8400	\$5 billion	1	0	18	Christine Cisco christine.cisco@rbc.com
5	Wells Fargo Advisors ⑧ home.wellsfargoadvisors.com/001_A290	6700 Main St. Williamsville, NY 14221 716-810-5000	\$3.24 billion	12	1	29	Kevin Brzezinski kevin.brzezinski@wellsfargoadvisors.com
6	Alliance Advisory Group Inc. ⑨ allianceadvisorygroup.com	600 Delaware Ave. Buffalo, NY 14202 716-817-7109	\$2.34 billion	4	0	55	James Fashano james.fashano@aglic.com
7	Courier Capital LLC ⑪ couriercapital.com	1114 Delaware Ave. Buffalo, NY 14209 716-883-9595	\$2.2 billion	3	3	3	Thomas Hanlon thanlon@couriercapital.com
8	Sandhill Investment Management ⑫ sandhill-im.com	40 Fountain Plz. Buffalo, NY 14202 716-852-0279	\$2.07 billion	2	2	9	Edwin Johnston emj@sandhill-im.com
9	Wilmington Trust ⑩ wilmingtontrust.com	1 Fountain Plz. Buffalo, NY 14203 716-848-7331	\$1.83 billion	1	1	5	Patricia Farrell pfarrell@wilmingtontrust.com
10	Nottingham Advisors ⑬ nottinghamadvisors.com	100 Corporate Pkwy. Amherst, NY 14226 716-633-3800	\$1.4 billion	0	4	5	Matthew Krajna matthew.krajna@nottinghamadvisors.com Tom Quealy tom.quealy@nottinghamadvisors.com Larry Whistler larry.whistler@nottinghamadvisors.com
11	Trubee Collins & Co. Inc. ⑮ trubeeollins.com	1 M&T Plz. Buffalo, NY 14203 716-849-1401	\$1.35 billion	3	1	15	William Pictor wpictor@trubeeollins.com
12	WNY Asset Management / Spectrum Wealth Management ⑯ wnyasset.com	6500 Sheridan Dr. Williamsville, NY 14221 716-626-0060	\$1.24 billion	8	0	3	Robert Castiglione Ronald Lojcono John Lughino John Pieroni
13	Sgroi Financial LLC ⑭ sgroifinancial.com	965 Union Rd. West Seneca, NY 14224 716-674-6700	\$1.14 billion	2	0	10	John Clouden Patrick Sgroi
14	Signity Financial ⑱ signityfinancial.com	350 Essjay Rd. Buffalo, NY 14221 716-626-2509	\$1.12 billion	25	1	80	J.D. Hartman john.hartman@signityfinancial.com
15	Arbor Capital Management ⑰ arborcapitalmgt.com	100 Corporate Pkwy. Amherst, NY 14226 716-446-9111	\$1.1 billion	1	2	2	Gerald Cole Lawrence McGowan ltmcgowan@arborcapitalmgt.com Daniel Toole dmttoole@arborcapitalmgt.com
16	First Aurora Financial Group ⑱ firstaurorafinancialgroup.com	634 Main St. East Aurora, NY 14052 716-655-7600	\$1 billion	2	0	10	Richard Bisesi Donald Eustice Jeffrey Kamien Ronald Olson
17	PPS Retirement Advisors ⑳ ppsadvisors.net	8660 Sheridan Dr. Williamsville, NY 14221 716-204-0170	\$985 million	1	0	3	Anthony Tomasula
18	Sanderson Wealth Management LLC ㉑ sandersonllc.com	50 Fountain Plz. Buffalo, NY 14202 716-566-2420	\$896.21 million	7	2	2	John Sanderson jsanderson@sandersonllc.com
19	Dopkins Wealth Management LLC ㉒ dopkinswealthmanagement.com	200 International Dr. Williamsville, NY 14221 716-634-8800	\$822.36 million	3	0	5	Thomas Emmerling temmerling@dopkins.com
20	Jensen Marks Langer & Vance LLC ㉓ jmlvwealthplanning.com	360 Delaware Ave. Buffalo, NY 14202 716-362-0170	\$810 million	4	1	10	Cynthia Vance cvance@jmlvwealthplanning.com