



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	Financial advisers	Top local executive(s)
1	Merrill Lynch Wealth Management ①	50 Fountain Plz. Buffalo, NY 14202 716-849-2121	\$14.07 billion	40	70	Christopher Mueller christopher.mueller@mml.com Robert Walter robert_walter@mml.com
2	Equitable Advisors ② empirestate.equitableadvisors.com	350 Essjay Rd. Williamsville, NY 14221 716-626-2507	\$12.41 billion	43	321	Lou Nucherenro louis.nucherenro@equitable.com
3	MassMutual New York State ③ ny-state.massmutual.com	300 Corporate Pkwy. Amherst, NY 14226 716-852-1321	\$10 billion	16	188	Joseph DiLeo jdileo@financialguide.com
4	Wells Fargo Advisors ⑤ home.wellsfargoadvisors.com/001_A290	6700 Main St. Williamsville, NY 14221 716-810-5000	\$3.69 billion	8	29	Kevin Brzezinski kevin.brzezinski@wfa.com
5	Wilmington Advisors @ M&T ②④ www3.mtb.com/personal/wilmington-advisors	285 Delaware Ave. Buffalo, NY 14202 800-724-7788	\$3.16 billion	6	26	Rich Marsh Matt McAfee
6	Alliance Advisory Group Inc. ⑥ allianceadvisorygroup.com	600 Delaware Ave. Buffalo, NY 14202 716-817-7109	\$3.04 billion	4	57	James Fashano james.fashano@aglic.com
7	RBC Wealth Management ④ us.rbcwealthmanagement.com/buffalo	6225 Sheridan Dr. Williamsville, NY 14221 716-635-8400	\$3 billion	1	17	Christine Cisco christine.cisco@rbc.com
8	Courier Capital LLC ⑦ couriercapital.com	1114 Delaware Ave. Buffalo, NY 14209 716-883-9595	\$2.2 billion	3	6	Thomas Hanlon thanlon@couriercapital.com
9	Sandhill Investment Management ⑧ sandhill-im.com	40 Fountain Plz. Buffalo, NY 14202 716-852-0279	\$2.17 billion	2	9	Edwin Johnston enj@sandhill-im.com
10	Lawley Retirement Advisors ⑤ lawleyretirement.com	361 Delaware Ave. Buffalo, NY 14202 716-849-1584	\$1.7 billion	1	5	James Rehak Jr. jrehak@lawleyretirement.com Todd Tevens ttevens@lawleyretirement.com
11	Sgroi Financial LLC ⑬ sgroifinancial.com	965 Union Rd. West Seneca, NY 14224 716-674-6700	\$1.4 billion	3	10	John Clouden Patrick Sgroi
12	WNY Asset Management LLC / Spectrum Wealth Management ⑫ wnyasset.com	6500 Sheridan Dr. Williamsville, NY 14221 716-626-0060	\$1.32 billion	7	6	Robert Castiglione Ronald Lojacono John Lughino Paige Lughino John Pieroni
13	Trubee Collins & Co. Inc. ⑪ trubeeollins.com	1 M&T Plz. Buffalo, NY 14203 716-849-1401	\$1.3 billion	3	15	John Shine jshine@trubeeollins.com
14	The Financial Guys ⑥ thefinancialguys.com	305 Spindrift Dr. Williamsville, NY 14221 716-633-1515	\$1.2 billion	3	27	Michael Lomas Glenn Wiggle
15	Arbor Capital Management ⑮ arborcapitalmgt.com	100 Corporate Pkwy. Amherst, NY 14226 716-446-9111	\$1.13 billion	1	3	Gerald Cole Lawrence McGowan Daniel Toole
16	Jensen Marks Langer & Vance LLC ⑳ jmlvwealthplanning.com	360 Delaware Ave. Buffalo, NY 14202 716-362-0170	\$1.1 billion	5	11	Cynthia Vance cvance@jmlvwealthplanning.com
17	First Aurora Financial Group ⑯ firstaurorafinancialgroup.com	634 Main St. East Aurora, NY 14052 716-655-7600	\$1 billion	3	12	Richard Bisesi Donald Eustice Jeffrey Kamien Ronald Olson
18	PPS Retirement Advisors ⑰ ppsadvisors.net	8660 Sheridan Dr. Williamsville, NY 14221 716-204-0170	\$950 million	1	2	Anthony Tomasula
18	Sanderson Wealth Management LLC ⑱ sandersonllc.com	50 Fountain Plz. Buffalo, NY 14202 716-566-2420	\$950 million	6	9	Justin Sanderson
20	Independent Solutions Wealth Management LLC ㉑ iswealthmanagement.com	305 Spindrift Dr. Williamsville, NY 14221 716-633-1515	\$800 million	4	15	Jay Blanchard Michael Lomas Glenn Wiggle
21	Dopkins Wealth Management LLC ⑲ dopkins.com	200 International Dr. Williamsville, NY 14221 716-634-8800	\$746 million	3	5	Thomas Emmerling temmerling@dopkins.com
22	Georgetown Lawley Group ㉒ georgetownlawley.com	5350 Main St. Williamsville, NY 14221 716-633-9800	\$722 million	0	8	Joseph Curatolo jcuratolo@georgetowncapital.net
23	Raymond James & Associates ㉓ raymondjames.com/buffalo-branch	468 Delaware Ave. Buffalo, NY 14202 716-768-3379	\$630.36 million	3	6	Lisa Walsh lisa.walsh@raymondjames.com
24	McCollum Christoferson Group LLC ㉔ mccollum-christoferson.com	500 Corporate Pkwy. Amherst, NY 14226 716-854-5400	\$509.8 million	1	2	Katherine Christoferson kchristoferson@mccollum-christoferson.com
25	Level Financial Advisors ㉕ levelfa.com	1412 Sweet Home Rd. Amherst, NY 14228 716-634-6113	\$504 million	6	6	Rosanne Braxton Steven Elwell Michael Heburn mheburn@levelfa.com

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