



LARGEST FINANCIAL PLANNING FIRMS IN BUFFALO

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	\$15.5 billion	30	76	Christopher Mueller
2	Equitable Advisors ② empirestate.equitableadvisors.com	350 Essjay Rd. Williamsville, NY 14221 716-626-2507	\$12.32 billion	38	288	Lou Nucheren
3	Vision Financial Group ③ vfgnys.com	300 Corporate Pkwy. Amherst, NY 14226 716-852-1321	\$10 billion	18	200	Joseph DiLeo
4	UBS Financial Services Inc. * ubs.com	250 Delaware Ave. Buffalo, NY 14202 716-849-3815	\$6.8 billion	3	23	Robert Swanson
5	Principal Financial Network * principal.com/northeast	100 Corporate Pkwy. Amherst, NY 14031 716-836-2422	\$4.7 billion	6	65	Scott Powhida
6	Wells Fargo Advisors ④ home.wellsfargoadvisors.com	6700 Main St. Williamsville, NY 14221 716-810-5000	\$3.72 billion	8	27	Kevin Brzezinski
7	Wilmington Trust * wilmingtontrust.com	1 Fountain Plz. Buffalo, NY 14203 716-848-7331	\$3.18 billion	4	3	Ken Williams
8	Alliance Advisory Group Inc. ⑥ allianceadvisorygroup.com	600 Delaware Ave. Buffalo, NY 14202 716-817-7109	\$2.7 billion	4	60	James Fashano
9	Courier Capital LLC ⑧ couriercapital.com	1114 Delaware Ave. Buffalo, NY 14209 716-883-9595	\$2.05 billion	3	10	Thomas Hanlon
10	Sandhill Investment Management ⑨ sandhill-im.com	40 Fountain Plz. Buffalo, NY 14202 716-852-0279	\$2 billion	2	10	Edwin Johnston
11	Lawley Retirement Advisors ⑩ LawleyRetirement.com	361 Delaware Ave. Buffalo, NY 14202 716-849-1584	\$1.68 billion	1	5	James Rehak Jr. Todd Tevens
12	Sgroi Financial LLC ⑪ sgroifinancial.com	965 Union Rd. West Seneca, NY 14224 716-674-6700	\$1.36 billion	4	11	Patrick Sgroi John Clouden
13	Trubee Wealth Advisors, Inc. ⑬ trubeewealth.com	600 Airborne Pkwy. Buffalo, NY 14225 716-849-1401	\$1.31 billion	3	15	John Shine
14	Nottingham Advisors * nottinghamadvisors.com	100 Corporate Pkwy. Amherst, NY 14226 716-633-3800	\$1.3 billion	0	5	Thomas Quealy, Jr.
15	WNY Asset Management / Spectrum Wealth Management ⑫ wnyasset.com	6500 Sheridan Dr. Williamsville, NY 14221 716-626-0060	\$1.3 billion	7	6	John Pieroni Robert Castiglione Ronald Lojacione Paige Lughino
16	Jensen Marks Langer & Vance LLC ⑯ jmlvwealthplanning.com	360 Delaware Ave. Buffalo, NY 14202 716-362-0170	\$1.13 billion	5	5	Cynthia Vance
17	Arbor Capital Management ⑮ arborcapitalmgt.com	100 Corporate Pkwy. Amherst, NY 14226 716-446-9111	\$1.11 billion	1	5	Lawrence McGowan
18	Sanderson Wealth Management LLC ⑰ sandersonllc.com	50 Fountain Plz. Buffalo, NY 14202 716-566-2420	\$1.1 billion	7	2	Justin Sanderson
19	First Aurora Financial Group ⑱ firstaurorafinancialgroup.com	634 Main St. East Aurora, NY 14052 716-655-7600	\$1 billion	2	8	Ronald Olson
20	Independent Solutions Wealth Management LLC ⑳ iswealthmanagement.com	305 Spindrift Dr. Williamsville, NY 14221 716-633-1515	\$800 million	5	20	Michael Lomas
21	Dopkins Wealth Management LLC ㉑ dopkins.com	200 International Dr. Williamsville, NY 14221 716-634-8800	\$676 million	4	5	Thomas Emmerling
22	Georgetown Lawley Group ㉒ georgetownlawley.com	5350 Main St. Williamsville, NY 14221 716-633-9800	\$633.03 million	0	9	Joseph Curatolo
23	Northcape Wealth Management * northcapewm.com	6565 Main St. Williamsville, NY 14221 (716) 632-6565	\$600 million	2	3	Erik O'Neill
24	Wilmington Advisors @ M&T ㉓ mtb.com/personal/wilmington-advisors	285 Delaware Ave. Buffalo, NY 14202 800-724-7788	\$587.65 million	7	28	Rich Marsh
25	Raymond James & Associates ㉔ raymondjames.com/buffalo-branch	468 Delaware Ave. Buffalo, NY 14202 716-768-3379	\$570.04 million	2	5	Lisa Walsh