

# BUFFALO BUSINESS FIRST

## THE LIST

# 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	<b>Merrill Lynch Wealth Management</b> ① local.ml.com/050816	50 Fountain Plz. Buffalo, NY 14202 716-849-2121	\$16.1 billion	22	69	Christopher Mueller
2	<b>Equitable Advisors</b> ② empirestate.equitableadvisors.com	350 Essjay Rd. Williamsville, NY 14221 716-626-2507	\$14.51 billion	45	307	Lou Nuchereo
3	<b>Vision Financial Group</b> ③ vfgnys.com	300 Corporate Pkwy. Amherst, NY 14226 716-852-1321	\$10 billion	19	200	Joseph DiLeo
4	<b>Principal Financial Network</b> ⑤ principal.com/northeast	100 Corporate Pkwy. Amherst, NY 14031 716-836-2422	\$5.25 billion	7	76	Scott Powhida
5	<b>Wells Fargo Advisors</b> ⑥ home.wellsfargoadvisors.com	6390 Main St. Williamsville, NY 14221 716-810-5000	\$4.49 billion	8	28	Kevin Brzezinski
6	<b>RBC Wealth Management</b> ⑧ us.rbcwealthmanagement.com/buffalo	6225 Sheridan Dr. Williamsville, NY 14221 716-635-8400	\$3 billion	1	18	Christine Cisco
7	<b>Courier Capital LLC</b> ⑨ couriercapital.com	1114 Delaware Ave. Buffalo, NY 14209 716-883-9595	\$2.88 billion	2	7	James Iglewski Thomas Hanlon William Gurney
8	<b>Alliance Advisory Group Inc.</b> ⑧ allianceadvisorygroup.com	600 Delaware Ave. Buffalo, NY 14202 716-817-7109	\$2.84 billion	5	65	Barbara O'Neill James Fashano
9	<b>Wilmington Trust</b> ⑦ wilmingtontrust.com	1 Fountain Plz. Buffalo, NY 14203 716-848-7331	\$2.51 billion	5	18	Ken Williams Patricia Farrell
10	<b>Sandhill Investment Management</b> ⑩ sandhill-im.com	40 Fountain Plz. Buffalo, NY 14202 716-852-0279	\$2.25 billion	3	12	Edwin Johnston Shant Goubrial Richard Ryskalczyk
11	<b>Lawley Retirement Advisors</b> ⑪ lawleyretirement.com	361 Delaware Ave. Buffalo, NY 14202 716-849-1584	\$1.66 billion	1	5	James Rehak Jr. Todd Tevens
12	<b>Sgroi Financial LLC</b> ⑫ sgroifinancial.com	965 Union Rd. West Seneca, NY 14224 716-674-6700	\$1.45 billion	4	13	Patrick Sgroi John Clouden
13	<b>Nottingham Advisors Inc.</b> ⑭ nottinghamadvisors.com	100 Corporate Pkwy. Amherst, NY 14226 716-633-3800	\$1.4 billion	1	6	Thomas Queaty Jr.
14	<b>WNY Asset Management</b> ⑮ wnyasset.com	6500 Sheridan Dr. Williamsville, NY 14221 716-626-0060	\$1.23 billion	7	3	John Pieroni Robert Castiglione Ronald Lojacono
15	<b>Jensen Marks Langer &amp; Vance LLC</b> ⑯ jmlvwalthplanning.com	360 Delaware Ave. Buffalo, NY 14202 716-362-0170	\$1.2 billion	5	10	Cynthia Vance
16	<b>Sanderson Wealth Management LLC</b> ⑰ sandersonllc.com	50 Fountain Plz. Buffalo, NY 14202 716-566-2420	\$1.2 billion	7	3	Justin Sanderson
17	<b>Arbor Capital Management</b> ⑰ arborcapitalmgt.com	100 Corporate Pkwy. Amherst, NY 14226 716-446-9111	\$1.1 billion	1	5	Lawrence McGowan
18	<b>First Aurora Financial Group</b> ⑱ firstaurorafinancialgroup.com	634 Main St. East Aurora, NY 14052 716-655-7600	\$1 billion	3	0	Jeffrey Kamien Ronald Olson
19	<b>Georgetown Lawley Group</b> ⑳ georgetownlawley.com	5350 Main St. Williamsville, NY 14221 716-633-9800	\$900 million	0	9	Joseph Curatolo
20	<b>Dopkins Wealth Management LLC</b> ㉑ dopkins.com	200 International Dr. Williamsville, NY 14221 716-634-8800	\$832.94 million	4	5	Thomas Emmerling
21	<b>Independent Solutions Wealth Management LLC</b> ㉒ iswealthmanagement.com	305 Spindrift Dr. Williamsville, NY 14221 716-633-1515	\$700 million	4	16	Michael Lomas
22	<b>Level Financial Advisors</b> ㉓ levelfa.com	9310 Transit Rd. East Amherst, NY 14051 716-634-6113	\$636 million	8	8	Rosanne Braxton Michael Heburn
23	<b>Wilmington Advisors @ M&amp;T</b> ㉔ mtb.com/personal/wilmington-advisors	285 Delaware Ave. Buffalo, NY 14202 800-724-7788	\$627.21 million	5	29	Matt McAfee Bobby Huddleston
24	<b>Raymond James &amp; Associates Inc.</b> ㉕ raymondjames.com/buffalo-branch	468 Delaware Ave. Buffalo, NY 14202 716-768-3379	\$552.73 million	2	6	Lisa Walsh
25	<b>Novity Wealth Solutions LLC</b> ㉖ novitywealth.com	300 Corporate Pkwy. Amherst, NY 14226 716-929-1544	\$525 million	1	4	Nathan Way