

MARCH 11, 2019

BARRON'S



AMERICA'S **TOP 1200** ADVISORS

Our annual state-by-state listing of the leading financial advisors. What they're recommending now

Armando Veve

2019 Top Advisor Ranking

Rankings based on assets under management, revenue generated for advisors' firms, quality of practices, and other factors. N=new.

RANK	2019	2018	Name	Firm	City	CUSTOMERS						Total Assets (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)
						Individuals (Up to \$1 mil)	High Net Worth (\$1-10 mil)	Ultrahigh Net Worth (\$10 mil+)	Foundations	Endowments	Institutional			
20.	13.		Robert Edwards	Wells Fargo Advisors*	Naples	•	•	•				4,227	5	25

*Now with Edwards Asset Management

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SPECIAL REPORT

Cool Heads Prevail: Talented advisors help their clients find a plan that works through thick and thin

AMERICA'S TOP 1200 FINANCIAL ADVISORS

By Steve Garmhausen

The following has been excerpted

Our annual Top 1,200 ranking recognizes outstanding advisors from all 50 states, plus the District of Columbia. It's our largest, most comprehensive listing, and it encompasses everyone from independents, who own and operate their own practices, to employees of the big Wall Street firms.

This special report names the top advisors in each state, with the number of ranking spots distributed in proportion to state population and wealth. Many of the ranked advisors work in or around locales of great wealth—Silicon Valley, New York City, South Florida, to name a few. How-

ever, the breadth of this ranking ensures that standouts in less populous and less wealthy areas receive the accolades they deserve.

Our rankings are based on assets under management, revenue generated by advisors for their firms, and the quality of their practices. Investment performance isn't an explicit criterion, because it is often a function of each client's appetite for risk. In our evaluations, we examine regulatory records, internal company documents, and 100-plus data points provided by the advisors themselves.

This year's ranking features many new

names. More than 15% of the 2019 Top 1,200—187 advisors—weren't in last year's listing.

The movement in the rankings reflects several factors, but perhaps the most significant is this: Top advisors are getting older. Their average age is now 56, up from 53 in the 2014 listing. That might appear a minor development, but it's significant because the best advisors start anointing successors and moving clients to them well in advance of actually leaving a practice. As a result, the rankings are starting to reflect generational change. ■

ROBERT T. EDWARDS

President
Senior PIM Portfolio Manager
Edwards Asset Management, Naples, Florida

Bob Edwards, recognized by Barron's as one of their Top 1200 Advisors for nine consecutive years, believes true success requires a delicate balance of diverse perspectives. "It's the math of business valuation, knowledge of history, and understanding the human behavior of markets. Get those right and I believe you'll increase your chances of being successful." His impressive record lends credence to his philosophy. As president and senior PIM portfolio manager, he utilizes customized approaches to serve affluent clients. Proprietary software, unique quantitative portfolio strategies, and in-depth performance tracking are at the heart of the method.

Bob is keenly aware of the human side of investing. "Our clients are real people with real lifestyle needs, bucket list wants and thoughtful dreams for future generations. To that end we've curated a caring and competent team dedicated to the task of exceptional, personalized client service. I believe if the management and service are right, the client will stay forever." Edwards cares about the future of the profession and frequently counsels industry professionals. He has also been a speaker at large industry conferences in Atlanta, Boston, Chicago, Dallas, Orlando, Philadelphia, and San Diego.

Bob's words of wisdom learned over decades of experience: "Know the metrics and the history, be attentive to the human factor - and bring passion!"

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The Barron's top 1,200 Advisors rankings are based on data provided by thousands of advisors. Factors included in the rankings were assets under management, revenue produced for the firm, regulatory record, length of service, quality of practice and client retention.

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