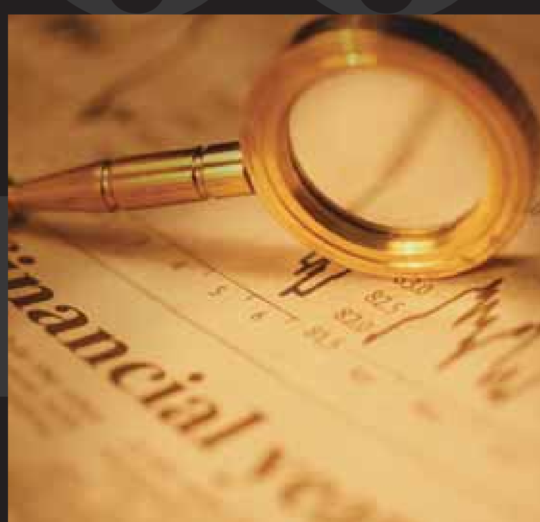
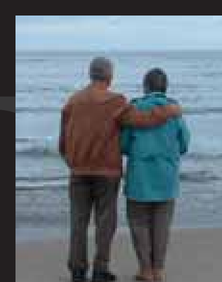
2008 INDEPENDENT SURVEY TO FIND THE BEST IN CLIENT SATISFACTION

Meet the Best

Personal Wealth Managers in the Atlanta Area





WEALTH MANAGER 2008 FIVE STAR

BEST IN CLIENT SATISFACTION

ANNOUNCING: Atlanta's 2008 FIVE STAR Wealth Managers.

We surveyed consumers, financial service professionals and our subscribers to find the best in client satisfaction wealth managers in the Atlanta area. Here they are.

Well over half of the consumer responses in the Atlanta area indicated it is difficult to find a wealth manager they trust and rely on [(1)]. Wealth managers, broadly defined, are those individuals who help you manage your financial world and/or implement aspects of your financial strategies. Common examples of wealth managers are financial advisors, life insurance agents, accountants, tax advisors, attorneys, bankers, etc.

With so many wealth managers to choose from, how do you find someone who listens to you, represents your interests and operates with an emphasis on integrity and service? *Atlanta Magazine* can help. The magazine recently formed a partnership with Crescendo Business Services, an independent research firm, to find out which wealth managers successfully satisfied key client satisfaction criteria and overall scored the highest in client satisfaction.

The Selection Process

In February, Crescendo surveyed, by mail and phone 95,000 high-net-worth residents in the Atlanta area and subscribers of *Atlanta Magazine*. An additional 9,000 surveys were sent to leaders of financial service industry companies.

On the surveys, recipients were asked to evaluate only wealth managers whom they knew through personal experience, and to evaluate them based upon nine criteria: customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale service, quality of recommendations and overall satisfaction.

Only original surveys—no copies—returned in their specially designed envelopes were accepted as valid. By March, stacks of surveys had arrived and Crescendo began carefully scoring each wealth manager. Both positive and negative evaluations were included in the scoring. Only wealth managers with five years of experience in the financial services industry were considered.

Next, each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by FINRA (the Financial Industry Regulatory Authority) and other regulatory agencies.

Then, before finalizing the list, wealth managers were reviewed by a blue-ribbon panel. The blue-ribbon panel was comprised of individuals from within the financial services industry. Although panelist comments were incorporated into the final score, safeguards were built into the review process to reduce the ability of panel members to influence the composition of the final list on the basis of company affiliation.

Best in Client Satisfaction

The resulting list of 2008 FIVE STAR Wealth Managers represents those wealth managers, of those evaluated, in the Atlanta area, that scored highest in client satisfaction. These wealth managers, represent less than 3 percent of the wealth managers in the Atlanta area. Only 376 of the top-scoring wealth managers made this year's list. To make the list more user-friendly, wealth managers have been grouped based upon their primary financial service. Each wealth manager has also listed up to three additional financial services that they provide their clients.

Although this list will certainly be a useful tool for anyone looking for help in managing their financial world or implementing aspects of their financial strategies, it should not be considered exhaustive. Undoubtedly, there are many other excellent wealth managers who, for one reason or another, are not on this year's list.

[(1)] 2008 Consumer Survey, Quantitative Market Intelligence

Research Declarations:

As with any research or recognition program, it is important that we provide you the following declarations:

- **The 2008 FIVE STAR Wealth Managers do not pay a fee to be included in the research or the final list of FIVE STAR Best in Client Satisfaction Wealth Managers.**
- The overall evaluation score of a wealth manager reflects an average of all respondents and may not be representative of any one client's evaluation.
- The FIVE STAR Award is not indicative of the wealth managers future performance.
- Wealth managers may or may not use discretion in their practice and therefore may not manage their client's assets.
- The inclusion of a wealth manager on the FIVE STAR Wealth Manager list should not be construed as an endorsement of the wealth manager by Crescendo Business Services or *Atlanta Magazine*.
- Working with a FIVE STAR Wealth Manager or any wealth manager is no guarantee as to future investment success nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Crescendo in the future.
- For more information on the FIVE STAR Award and the research/selection methodology, go to: www.fivestarprofessional.com/wmresearch.

FIVE STAR WEALTH MANAGERS — BEST IN CLIENT SATISFACTION

INDEX OF WEALTH MANAGERS

List compiled by Crescendo Business Services. Names in boldface also appear in the profiles that follow. Wealth Manager additional financial services: AC=Accounting; BK=Banking; BP=Business Planning; CG=Charitable Giving; EP=Estate Planning; FP=Financial Planning; IN=Insurance; IV=Investments; LC=Long-term Care; TS=Trust Services; TX=Taxation; WP=Will Preparation

ACCOUNTING

ACCOUNTING

Bruce Paulk
Clayton, Paulk & Associates
EP, FP, IV

ESTATE PLANNING

Marianna Batie
Sutherland
CG, TX, WP

Leonard F. Bittner
Magellan Planning Group
CG, IV, TS

Henry L. Bowden, Jr.
The Bowden Law Firm
CG, TX, WP

Frank H. Briggs
AXA Advisors/Briggs & Associates
EP, IN, IV

Richard Bryson
Morris & Bryson
TX, WP

Bruce Gaynes
Kitchens Kelley Gaynes
BP

Roger A. Kirschenbaum
Wagner, Johnson & Rosenthal
BP, TX, WP

Jeremy Lantz
Lantz & Reeves
BP, TS, WP

James H. Morgan, Jr.
Smith, Gambrell & Russell
BP, FP, TX

Richard M. Morgan
Morgan & Disalvo
CG, TX, WP

Chuck Nida
Peachtree Planning
IN, IV, LC

Tony Turner
Cohen Pollock Merlin & Small
BP, CG

Steve Voshall
Financial Benefit Group
EP, IN, IV

Joel Weitnauer
John Hancock
IN, LC

FINANCIAL PLANNING

Gary Abshier
Creative Financial Group
IV

Christopher Allessio
Edward Jones
IN, IV, LC

Charlie Anderson
Morgan Stanley
EP, IV

FINANCIAL PLANNING

Terry L. Anderson
Delta Community Credit Union
IN, IV, TS

Julianne Andrews
Atlanta Financial Associates
EP, IN, IV

Erik Anhaus
Ameriprise Financial
EP, IN, IV

Tracy Aufleger
Ameriprise Financial
EP, IN, IV

Shane Austin
Tegra Financial Partners
BP, EP, IV

Parks Avery
Welden Financial Services
EP, IN, IV

Lamar Barden
Peachtree Planning
FP, IN, IV

Larry J. Baugh
Baugh & Associates
BP, EP, IV

Michael Bean
Key Planning Financial Services
EP, IV

Michael Becher
John Hancock
IN, IV

Craig Belisle
GV Financial Advisors
CG, EP, IV

Philip Benedict
Benedict Financial Advisors
BP, IV, TS

Andrew J. Berg
Homrich & Berg
CG, EP, IV

Jeff Bernier
Tandem Growth Financial Advisors
IV

Nicholas Bhandari
Tegra Financial Partners
EP, IN, IV

Bruce Bickley
UBS Financial Services
BP, EP, IV

Brian Blough
Edward Jones
EP, IN, IV

Lisa Boone
Smith Barney
BP, EP, IV

Montague 'Cosmo' Boyd
Smith Barney
BK, EP, IV

FINANCIAL PLANNING

A. Sidney Browning
National Financial Services
BP, CG, EP

Kary Brownlee
Smith Barney/Citigroup
IN, IV

R. Todd Burkhalter
The Johnson Financial Group
EP, IN, IV

John H. Burt, Jr.
Peachtree Planning
IN, IV, LC

Preston Byers
ClearBridge Wealth Management
IV

Mark Byrnside
Ameriprise Financial
BP, IN, IV

Scarlott L. Cagle
Summit Wealth Management
EP, IV, TX

Charles Caldwell
CRC Financial
EP, IN, IV

William P. Canby
SunTrust Bank
EP, IV, BP

R. Mark Castle
Smith Barney
IN, IV, LC

Edward J. Chimino
National Benefit Services
IN

Jeff Chinery
RonaldBlue & Co./Everyday Steward
CG, IV, TX

Raj Chokshi
Niagara Financial Advisors
IN, IV, TX

Russell Clarke
Ameriprise Financial
BP, IN, IV

Jack Cohen
Robert W. Baird & Company
EP, IN, IV

Jeff Cohen
Nova Wealth Management Group
EP, IV, TX

Clayton J. Constant
Merrill Lynch
BP, EP, IV

Charles J. Costa III
Professional Planning Advisors
CG, EP, IV

Colby J. Craig
Merrill Lynch
IV

FINANCIAL PLANNING

Stephen R. Crocker
SunTrust Investment Services
IN, IV

Blair Cunningham
Signature FD
CG, EP, IV

Helga Cuthbert
Cuthbert Financial Guidance

Jeff Davis
Apogee Family Office
BP, EP, IV

Mark De Maine
De Maine Wealth Management
BP, EP, IV

Charles De Normandie
Ameriprise Financial
EP, IV

Daniel Dubay
PPA Advisors
BP, EP, IV

Michelle Duffy
Ameriprise Financial
IV

Eric T. Duncan
Strategic Financial Partners
EP

Suzanne Durbin
GV Financial Advisors
CG, EP, IV

Kris Dwyer
LongView Wealth Management
IV

James D. Dykes
Peachtree Planning
IN, IV, TX

Keith Dykes
Peachtree Planning
CG, EP, IV

P. Christopher Ellington
WealthCreation Atlanta
EP, IN, IV

Kevin Ferguson
AXA Advisors
IV

Amanda S. Fischer
Oster & Fischer
EP, IV, LC

David Fisher
Signature FD
BP, EP, IV

Chris Fletcher
Fletcher Financial Planning
IN

Blake Flood
Consolidated Planning
EP, IN, IV

Emma Foulkes
Ameriprise Financial
IN, IV, TS

FINANCIAL PLANNING

Valerie Fricks
Capstone Financial Partners
EP, IN, IV

Kristen Fricks-Roman
Smith Barney
EP, IN, IV

George David Fritts
Ameriprise Financial
BP, IV

Chris Gabriel
UBS Financial Services
CG, IV, TS

Mary Ellen Garrett
Merrill Lynch
BP, EP, IV

Vance Garrison
Merrill Lynch
EP, IV, TS

David Gaynes
Gaynes Financial Services
BP, EP, IV

David Geller
GV Financial Advisors
BP, EP, IV

Margaret M. Graff
Ameriprise Financial
EP, IN, IV

William Grant
Banc of America Investment Services
EP, IV, TS

Charles B. Gray
GV Financial Advisors
EP, IN, IV

Brooks M. Gregory
Peachtree Planning
EP, IN, IV

Richard Grodzicki
Smith Barney
BP, EP

William G. Hammond
Hammond Investment Planning Corporation
IN, EP

Gary Lee Harr
Ameriprise Financial
EP, IN, IV

Steven Hayden
Atlanta Planning Group
IN, IV, LC

Robert Heisterberg
UBS Financial Services
BK, IV

Stan Helm
Wealth Creation Atlanta
BP, EP, IV

Mike Hines
Consolidated Planning
EP, IV, TS

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FINANCIAL PLANNING

Kurt Hirshman
UBS Financial Services
BP, EP, IV

Robert S. Hockett
Cambridge Southern Financial Advisors
BP, EP, IV

Jon Houk
JPH Advisory Group
IV

Lenard Iglar
Smith Barney
EP, IN, IV

Charles Jackle
Smith Barney
BK, IV, TS

Timothy Jeffrey
UBS Financial Services
IN, IV, LC

Ted Jenkin
Oxygen Financial
BP, IN, IV

Brian Jenkins
UBS Financial Services
BP, EP, IV

David Matthew Justice
Peachtree Planning
EP, IN, IV

Dr. Barry H. Kaplan
Cambridge Southern Financial Advisors
CG, EP, IV

Scott Kays
Kays Financial Advisory Corporation
IV

Brian Kazinec
Colvin, Kazinec & Associates
IN, IV, LC

Rick L. Kent
Allegiance Advantage Group/ Merit Retirement Advantage
IV

Patricia A. Koehn
Koehn Financial Group
IV, EP, CG

Tim Koenning
Magnolia Financial Advisors
EP, IN, IV

Margaret Kulyk
Kulyk & Associates
CG, EP, IV

William G. Lako, Jr.
The Henssler Financial Group
EP, IN, IV

Charles E. Lanford
Raymond James Financial Services
IN, IV, LC

FINANCIAL PLANNING

E.R. (Rocky) Lange
BB&T Wealth Management
BK, EP, IV

Richard Lenhardt
Capstone Financial Partners
IN, IV, LC

Peter Levy
Ameriprise Financial
BP, IN, IV

Scott Levy
MML Investors
EP, IN, IV

Marc Lewyn
GV Financial Advisors
BP, EP, IV

Christine Anne Lizaso
Smith Barney
BP, BK, IV

Richard Lombardi
Integrated Wealth Strategies
IV

Tom Maiwald
Lincoln Financial Advisors
IN, IV, LC

Mike Maltby
Morgan Stanley/The Maltby Group
BP, EP, IV

Marvin Mangham
Atlanta Planning Group
IN, IV, LC

Kari March
Roka Wealth Strategists
EP, LC, TX

Kurt Mattson
Northwestern Mutual Investment Services
IN, IV, LC

Maria H. McCann
Smith Barney
EP, IV

Jared McClure
Morgan Stanley
CG, IN, LC

James McGarvey
US Planning Group
IN, IV

Rob McGoldrick
Triad Advisors
AC, IV, TX

Kevin F. McGrath
UBS Financial Services
EP, IV, TS

Alan McKnight
Kays Financial Advisory Corporation
IV

Shawn Meade
Niagara Financial Advisors
IN, IV, TX

FINANCIAL PLANNING

J. Kevin Meaders
Magellan Planning Group
EP, TS, WP

Debbie Montgomery
DM Financial Planning
BP, EP

Wesley Moss
UBS Financial Services
BK, IN, IV

Barry V. Munro
Munro Legacy Planners

Bursell T. Munro
Ameriprise Financial
BP, IV, TX

Bobbie Munroe
Fraser Financial
IV

Erick Olson
Olson Associates
CG, EP, IV

Brian O'Neill
Creative Financial Group
EP, IV, TX

Stephan Oster
Oster & Fischer
EP, IV

Casey Patrick
Patrick Financial
BP, IN, IV

Donald W. Patrick
Integrated Financial Group
EP, IV, LC

Patrick Paxton
Investment Planning Advisors/Money Concepts
IN, IV, LC

Jeff Peller
Signature FD
BP, EP, IV

Phillip Pennartz
Vining Financial Services
IN, IV, LC

Virginia Persons
Smith Barney
EP, IN, IV

Richard (Scott) Phelan
Edward Jones
EP, TS

Jean F. Raines
First Command
IN, IV, LC

Jeremy Reese
Ameriprise Financial
IN, IV, LC

Patrick Renn
The Renn Wealth Management Group
BP, EP, IV

S. Neal Rhoney
Ameriprise Financial
EP, IN, IV

FINANCIAL PLANNING

Peyton Riley
Peachtree Planning
CG, EP, IV

Lisa Rinzler Lubel
Merrill Lynch
EP, IN, IV

Derrick Rivera
Ameriprise Financial
BP, IN, IV

Mike Ross
The Wealth Enhancement Group
BP, EP, IV

Harold Bradley Rouse
Chatuge Financial Solutions
IN, IV, LC

Nicky Rudd
Merrill Lynch
BP, EP, IV

Robert F. Rumley III
Merrill Lynch
CG, IN, IV

David Sandstrom
Ameriprise Financial
EP, IN, IV

Jonathan Sard
Sard Wealth Management Group
EP, IV, LC

Verma (Reneigh) Satterfield
Edward Jones
EP, IN, IV

Ron Savarese
UBS Financial Services

Lisa Taranto Schiffer
Tegra Financial Partners
BP, EP, IV

Laura Schilling
Financial Innovations
IN, IV, WP

Richard Schneiderman
Ameriprise Financial
IN, IV, LC

Al Searcy
Searcy, Weems-Scott & Cleare
EP, IN, IV

Marta Shen
Spring Street Financial
IN, IV

Tom Sherrill
Sherrill & Hutchins Financial Advisory
IV

Norman Shirley
Commonwealth Financial Planners
EP, IN, IV

Mike Skrynecki
Morgan Stanley
CG, IN, IV

FINANCIAL PLANNING

Felicia Speetjens
SunTrust Bank
BK, EP, IV

David Summers
Cornerstone Financial Advisors
EP, IN, IV

Jeff Taylor
Crescent Wealth Management
EP, IN, IV

Stephen Teague
Edward Jones
CG, EP, TS

Jennifer J. Thomas
The Henssler Financial Group
BP, EP, IV

W. Joe Thomas
SunTrust Bank
BK, EP, IV

Andre Van Horn
Merrill Lynch
CG, EP, IV

Marie Vidal
Raymond James Financial Services
BP, EP, IV

Waldemar Vidal
Raymond James Financial Services
BP, EP, IV

Steven Wisnewski
Waddell & Reed
EP, IN, IV

Shaun Wright
Merrill Lynch
EP, IV, TS

Timothy Wyrobek
Crescent Wealth Management
EP, IN, IV

Nicholas Yeomans
Yeomans Consulting Group
EP, FP, TX

Charles S. Zimmerman
Signature FD
EP, IN, IV

INSURANCE

Daniel Boaz
The Healthlife Group Agency
IV, LC

John A. Crawford
Northwestern Mutual
EP

Thomas Hebrank
Advanced Planning Solutions and The Center for Lifelong Planning
LC

FIVE STAR WEALTH MANAGERS — BEST IN CLIENT SATISFACTION

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INSURANCE

Scott Jeffries
Northwestern Mutual
BP, FP, IV

Lawton M. Nease II
Nease, Lagana, Eden & Culley
BP, CG, EP

Maury Shapiro
Financial Life Cycles/AXA Advisors
FP, IV, LC

Robert A. Sheats
Ashford Advisors/Park Ave. Securities
BP, IV

Joseph Strawbridge III
Strawbridge & Associates
FP, IV, LC

Andrew Williams
3P Enterprises
BP, FP, LC

Bryan D. Wulz
New York Life
BP, EP, FP

INVESTMENTS

Gary Alexander
Wachovia Securities

Marc Alexander
RBC Wealth Management
EP, IN, FP

Brad Alford
Alpha Capital Management

John M. Allen, Jr.
Legacy Financial Advisors
BP, EP, IN

Robert Amato
Smith Barney
BP, EP, FP

Frederick Arnold
Merrill Lynch
EP, FP, TS

Jay Bailey
Citadel Wealth Management
EP, IN, FP

Jeffrey A. Baumert
Advisor Financial Services
EP, FP

Melissa Bensman
Charles Schwab
FP

Barry Berlin
Atlantic Trust
CG, EP, FP

George Bird
Smith Barney
FP

Ralph Boardman
Tax & Financial Strategies

John Bolen
SunTrust Investment Services
FP, IN, LC

Carla Britton
Merrill Lynch
EP, FP, TS

Tula Burch
Principal Financial
EP, IN, FP

Jack Calhoun
Capital Directions
EP, IN, FP

Kelly Cannon
U.S. Trust/ Bank of America Private Wealth Management
EP, FP, TS

Bill Carnes
Citigroup Global Markets
EP, FP

Robert H. Carson, Jr.
Raymond James Financial Services
BP, EP, FP

Christopher Lewis Castellaw
Deutsch Bank/Alex Brown
EP, FP

T. Ned Castleberry
Edward Jones Investments
IN, LC

Alan Cole
TIAA CREF Financial Services
FP, IN, TS

Bob Cook
Edward Jones
EP, IV, LC

Dave Cook
Edward Jones
IN, LC

Diane Cook
SunTrust Investment Services
FP, IN, BK

Sean Cook
DCA Global Wealth Management
EP, IN, FP

Andy Copeland
Edward Jones
IN, LC, TS

Lillian Correa
Smith Barney
BP, EP, FP

Frank Corrigan
Morgan Stanley
FP

Mike Crego
Wachovia Securities

Douglas Crenshaw
Morgan Keegan
BP, EP, FP

Andrew Crews
Northern Trust
BK, FP, TS

David Cross
Merrill Lynch/The Cross Group
FP

William Curtis
Morgan Stanley/The Embleton Curtis Group
EP, IN, FP

Paul Damm
Wilmington Trust
CG, EP, TS

Chris Dardaman
Brightworth
EP, FP, TX

Ragan E. DeFreese
UBS Financial Services
EP, FP

Ben D. DeHaan
Lighthouse Financial Partners
BP, FP, IN

Tom Delahunt
Merrill Lynch
EP, IN, FP

Roland Deliniere
Wachovia Securities/A.G. Edwards

Patrick Desamours
Edward Jones
EP, IN, FP

Brian Doe
Merrill Lynch
FP, IN, BK

Stewart Eads
Eads & Heald Investment Counsel

Mark Elam
Genspring Family Offices

John F. Embleton
Morgan Stanley/The Embleton Curtis Group
EP, IN, FP

Timothy C. Escott
Maple Capital Management

Alan Evans
Securities America
FP, IN

William Fennell
Ameriprise Financial
FP, IN

Robert Fezza
Odyssey Personal Financial Advisors
EP, FP, LC

Tom Foster
Citigroup Global Markets
FP

Jean O'Brien Frank
Wachovia Securities

Stephen E. Frederick
Edward Jones
FP, IN, LC

Michael Friedman
Morgan Stanley

Jan Dahlin Geiger
LongView Wealth Management
EP, IN, FP

Timothy Gelinas
Senior Financial Planning
FP, IN, LC

Charles Germany
RonaldBlue & Co.
CG, EP, FP

Richard Gilmore
UBS Financial Services
EP, IN, FP

Monica Giuseffi
Edward Jones
EP, IV, TS

Alan Gotthardt
Brightworth
EP, FP, TX

Ellis Green
Green Wealth Management Group of Raymond James & Associates
FP

Roger S. Green
Green Financial Resources
EP, IN, FP

William Andrew Griffin
W A Griffin Financial Services
FP

Anthony Guinta
Homrich & Berg
CG, EP, FP

Robert David Haggard
Stanford Group
BK, FP

Anno Hardage
Corner Cap Investment Counsel
CG, EP, FP

Jack Harmon
Raymond James Financial Services
CG, EP, FP

William Harris
Buckhead Investment Partners
FP

Marc Heilweil
Specktrum Advisory Services

Rick Henderson
Cornerstone Financial Advisors
BP, EP, FP

Gene W. Hanssler
The Henssler Financial Group
BP, EP, FP

David Higgins
Smith Barney
IN, TS

Andrew Hill
SunTrust Investment Services
FP, IN, BK

Lee W. Hollingsworth
Lee W. Hollingsworth
BP, CG, EP

Rich Houghton
Raymond James Financial Services
EP, FP

John E. Howard
Resource Planning Group
BP, EP, FP

Brian C. Huber
Wachovia Securities

Matthew Hudgins
Mosaic Wealth Management
FP

William Hyde
UBS Financial Services
EP, FP

James Jasmin
Morgan Stanley
EP, IN, FP

Lee A. Jenkins
Jenkins Wealth Advisors
FP

Jason Joffe
Morgan Stanley
EP, FP, TS

Edward Johnson
Morgan Keegan
FP

Jeffrey T. Jones
SunTrust Investment Services
FP

Robert Jones
Reliance Securities
EP, IN, LC

Thomas H. Jones
UBS Financial Services
IV

Mark Kantor
Smith Barney
FP, IN

Dwight Kees
American Wealth Management
FP, IN, LC

Scott L. Keller
The Henssler Financial Group
BP, EP, FP

Warren T. Kennett II
Wachovia Securities

William Kring
Kring Financial Management
EP

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INVESTMENTS

Linda Kuryloski
Edward Jones
IN, LC

David B. Kusiel
Morgan Stanley
CG, EP, FP

Scott Lewis
Merrill Lynch
BP, FP, TS

Damon Limberis
Merrill Lynch
EP, FP, TS

Henry Lins
Scott & Stringfellow
CG

Matthew Lipscom
Ashford Advisors/Park Ave. Securities
BP, FP, IN

Fredrick Livingston
Planmark Capital Management
BP, EP, FP

Eric Lloyd
Advanced Financial Strategists
EP, FP

Deborah Lucente
Charles Schwab/Private Client
FP, IN

Lawrence Makepeace
Merrill Lynch
CG, EP, TS

Gary B. Martin
Wilmington Trust
EP, IN, TS

David E. Mattox
Charles Schwab
BK

Jim McDaniel
Smith Barney/Citigroup
CG, EP, FP

James C. McElroy, Jr.
Atlantic Trust
EP, FP, TS

Michael J. Merlin
Smith Barney
BP, EP, FP

Janet T. Miller
Rowland & Company

Anthony Montag
A. Montag & Associates
FP

Hugh T. Moody
Merrill Lynch/Private Banking & Investment Group
EP, FP, TS

Danny Moore
Atlanta Capital
EP, FP, LC

Dan Moss
UBS Financial Services
EP, IN, FP

William R. Mumpower
Ashford Advisors/Park Ave. Securities
BP, FP

Les Netter
Morgan Stanley
IN, IV, LC

Matthew P. Newall
Smith Barney
EP, FP, TS

Derek Nowatzki
Edward Jones
IN

David W. O'Brien
Wachovia Securities

Ray Padron
Brightworth
EP, FP, TX

William Pahl
Smith Barney
BK, FP

Douglas Palfrey
JP Morgan Company/Bear Stearns
BP, EP, FP

Lynda Parker
Raymond James Financial Services
FP

Anthony M. Petro
Princor Financial
BP, EP, IN

Robert Pierson
RBC Wealth Management
FP, TS

David Polstra
Brightworth
EP, FP, TX

Robert Prater
Morgan Stanley
EP, FP, TS

Warren Prehmus
Prehmus Financial
CG, EP, FP

Alan Proctor
Morgan Stanley
BP, EP, FP

Travis Propst
Merrill Lynch
BK, FP

David Pursell
Morgan Stanley
FP

Michael Reiner
Capital Investment Advisors
EP, FP, TX

Joe Rollins
Rollins Financial Counseling
EP, FP, TX

Greg Rose
Merrill Lynch
BP, BK, FP

Douglas Ross
Smith Barney

Jay M. Rottner
Morgan Keegan
EP, FP, TS

Mark Rowland
Rowland & Company

Harvey Schneider
Wachovia Securities
FP

Richard (Dick) Schubert
Atlanta Consulting Group/ Morgan Keegan

Jeffrey Schultz
Morgan Keegan
BP, EP, FP

Jonathan Seidel
UBS Financial Services
FP, IN

Roger Shaffer
Alexander Key
EP, IN, FP

Alfred M. Shams
Midsouth Capital

Kay Shirley
Financial Development Corporation
FP, LC, TX

Alan Marshall Smith
Morgan Stanley
FP

Robert F. Snow
Scott & Stringfellow
CG

William B. Spalding
Bill Spalding Financial Services
IN

William J. Stanton
LPL Financial
CG, EP, FP

Lane Steinberger
Alexander Investment Advisory
BP, FP

Brady Stoor
Charles Schwab
CG, FP, BK

Richard B. Taylor
HLB Advisory Services
BP, FP, IN

Shannon Thomason
Morgan Stanley
EP, IN, FP

Russ Thornton
Thornton Wealth Management
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