

2010 LEADING PROVIDERS

Wealth Managers

OF THE
WESTERN
UNITED STATES

**THE PROVIDERS SELECTED
MEET OR EXCEED THE
CRITERIA BELOW**

RIA or IAR

Fee-Only or Fee-Based

15+ Years of Experience

Advanced
Certifications Held

No Unresolved Lawsuits
or Grievances

Comprehensive Range of
Wealth Management &
Financial Planning
Services Offered

^a Fourth Year Certified

^b Third Year Certified

^c Second Year Certified

¹ SECURITIES OFFERED THROUGH LPL FINANCIAL, MEMBER FINRA/SIPC.

² SECURITIES OFFERED THROUGH PACIFIC WEST SECURITIES, INC. MEMBER FINRA/SIPC. FINANCIAL ADVISORY SERVICES THROUGH PACIFIC WEST FINANCIAL CONSULTANTS, INC., A REGISTERED INVESTMENT ADVISOR.

³ SECURITIES AND INVESTMENT ADVISORY SERVICES OFFERED THROUGH WOODBURY FINANCIAL SERVICES, INC., MEMBER FINRA, SIPC AND REGISTERED INVESTMENT ADVISOR. STAFFORD WEALTH MANAGEMENT, LLC. AND WOODBURY FINANCIAL SERVICES, INC. ARE NOT AFFILIATED ENTITIES.

⁴ SECURITIES OFFERED THROUGH RAYMOND JAMES FINANCIAL SERVICES, INC. MEMBER FINRA/SIPC. SOMERSET WEALTH STRATEGIES IS INDEPENDENT OF RAYMOND JAMES FINANCIAL SERVICES, INC.

⁵ INVESTMENT ADVISORY SERVICES OFFERED THROUGH BROOKSTONE CAPITAL MANAGEMENT LLC, AN SEC REGISTERED INVESTMENT ADVISOR.

Pence Wealth Management, Inc.^{1,b}

5000 Birch Street, Suite 7600
Newport Beach, CA 92660
949-660-8777 ||
www.PenceWealthManagement.com
PWM helps grow and preserve clients' wealth through customized comprehensive financial planning using cash flow focused investment options delivered through unprecedented personalized service. Trusted by clients and their families nationwide.

Multop Financial^{2,a}

333 Calluna Court, Suite 205
Bellingham, WA 98226
877-671-7890 || www.multop.com
Multop Financial provides impressive customer service blended with skilled income tax planning and portfolio management for high-level financial strategies.

Stafford Wealth Management, LLC^{3,c}

2538 Anthem Village Drive, Suite 115
Henderson, NV 89052
702-433-2008 ||
www.staffordwealthmanagement.com
During his 28 year career in financial planning, Bill Stafford, CFP® has received numerous industry awards by providing outstanding estate and retirement planning services to both individuals and businesses.

Marathon Investment Programs^c

REGISTERED INVESTMENT ADVISOR

902 El Rancho Road
Santa Barbara, CA 93108
805 969 9646 || www.marathonip.com
With a long history of protecting their clients against large losses, Marathon is respected for generating consistent and superior returns, regardless of market direction.

www.leadingproviders.com

GOLDLINE RESEARCH STRIVES TO PROVIDE OBJECTIVE RESEARCH ON PROFESSIONAL SERVICES COMPANIES. GOLDLINE RESEARCH DOES NOT PROVIDE A RANKING OF COMPANIES, AND THIS LIST SHOULD NOT BE CONSTRUED AS A "TOP 10" LIST. GOLDLINE RESEARCH'S EVALUATION OF WEALTH MANAGERS IS NOT BASED UPON INVESTMENT PERFORMANCE OR CLIENT INTERVIEWS. EACH OF THE WEALTH MANAGEMENT FIRMS PRESENTED ABOVE HAS COMPLETED AND PASSED THE RIGOROUS GOLDLINE RESEARCH CERTIFICATION PROCESS WHICH INCLUDES AN IN-DEPTH INTERVIEW, A REVIEW OF ALL SEC, FINRA AND STATE SECURITIES LICENSES AND FILINGS, AS APPLICABLE, AND A QUANTITATIVE ANALYSIS OF KEY FIRM AND MARKET DATA. EACH OF THE WEALTH MANAGEMENT FIRMS PRESENTED ABOVE HAS HELPED OFFSET THE COST OF PURCHASING THIS PAGE. ALTHOUGH GOLDLINE RESEARCH CONFIRMS THAT AT THE TIME OF INITIAL PUBLICATION OF THIS LIST THAT EACH COMPANY MEETS THE GENERAL CRITERIA ABOVE, NO PROMISE IS MADE THAT THEY WILL CONTINUE TO DO SO, OR THAT A PARTICULAR SERVICE PROVIDER IS APPROPRIATE FOR THE READER'S INDIVIDUAL CIRCUMSTANCE. ONLY YOU CAN DETERMINE THIS AFTER YOUR OWN INDEPENDENT INQUIRIES. ANY USE OF THE INFORMATION PROVIDED HEREIN IS AT YOUR OWN RISK. GOLDLINE RESEARCH DISCLAIMS ALL LIABILITY OR RESPONSIBILITY FOR INJURY ARISING FROM YOUR UTILIZATION OF THE INFORMATION CONTAINED HEREIN. COMPANIES ARE LISTED IN NO PARTICULAR ORDER AND NO COMPARISONS ARE MADE BETWEEN THE LISTED COMPANIES AND ANY UNLISTED COMPANIES. TO LEARN MORE ABOUT THE CERTIFICATION PROCESS, PLEASE VISIT WWW.LEADINGPROVIDERS.COM. GOLDLINE RESEARCH IS NOT AFFILIATED WITH FORBES® MAGAZINE.

The Investment Counsel Company^a

10000 West Charleston Boulevard, Suite 280
Las Vegas, NV 89135
702-871-8510 || www.iccnv.com

The Investment Counsel Company, Nevada's first independent investment management consulting firm, provides superior investment guidance, perspective and judgment to affluent families, corporations, foundations and endowments who expect and value the highest standard of integrity and personalized, competitive service.

Tellone Management Group, Inc.^b

6200 East Canyon Rim Road, Suite 201
Anaheim Hills, CA 92807
714-998-2290 || www.tellone.com

For over 30 years Tellone wealth managers have provided outstanding personal service & offer comprehensive financial, tax & estate planning, specializing in active investment management for individuals, trusts, IRA's and pensions.

Treiberg Wealth Management, Inc.^{1,b}

3573 East Sunrise Drive, Suite 115
Tucson, AZ 85718
520-232-0505 || www.lpl.com/treiberg
Providing customized investment strategies and comprehensive risk management, blending the resources of a large corporation with the flexibility of a small, independent firm. Founded on integrity, unbiased advice and sound investment principles.

Praetorian Guard^c

3775 Via Nona Marie, Suite 220
Carmel, CA 93923
877-474-9600 || www.praetorianguard.biz
Praetorian Guard provides comprehensive wealth management services for individuals, business owners and families. They specialize in coordinating your financial situation with your other professional advisors.

Somerset Wealth Strategies⁴

4600 S.W. Kelly Avenue
Portland, OR 97239
503-595-1333 || www.somersetws.com
With more than 19 years of experience as a retirement plan specialist and 435 million dollars under management (\$200 million at RJFS), Tom Hamlin Registered Principal at Somerset Wealth Strategies is among the leading wealth management professionals in the Pacific Northwest.

Secured Financial Solutions, LLC^{5,c}

14301 North 87th Street, Suite 116
Scottsdale, AZ 85260
800-957-5604 || www.anilvazirani.com
For more than 17 years, Secured Financial Solutions has been a leading provider of innovative solutions for asset preservation and estate protection.

415-892-9400