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2014 Top Advisor Rankings: Oregon



Ranked #1: Thomas B. Gau ▶ Gau loves meeting with prospective clients because in going over their financial situations, he's always able to pinpoint something that needs fixing. "After 30 years, I still find that most investors have not sat down with someone who fully coordinated their tax planning with their investment and estate plans," he says. Gau, 56, was cited in Malcolm Gladwell's best-selling *The Tipping Point*—"Tom Gau happens to sell financial planning services," Gladwell wrote. "But he could, if he wanted to, sell absolutely anything." Yet Gau is also passionate about what happens after landing a new client. He provides well-rounded service, from investing to tax and estate-plan reviews. Rather than managing assets personally, Gau parcels clients' money out to trusted fund managers. His goal, he says, is not necessarily to crush the market, but to earn clients a good return while protecting their assets. -STEVE GARMHAUSEN

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Rank	'14	'13	Name	Firm	Location	CUSTOMERS					Total Asset (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)
						Individuals (Up to \$1mil)	High Net Worth (\$1-10 mil)	Ultra-High Net Worth (\$10 mil+)	Foundations	Endowments			
1	1		Thomas B. Gau	Retirement Planning Specialists	Ashland, Ore.		•	•			1471	2.6	5
2	N		James Beatty	UBS Financial Services	Portland, Ore.	•	•	•	•		550	2.5	5
3	5		James Wrenn	UBS Financial Services	Lake Oswego, Ore.	•	•		•	•	1910	5	5
4	6		Judith McGee	Raymond James	Portland, Ore.	•	•			•	375	1	5
5	8		Glen Clemans	Royal Alliance	Lake Oswego, Ore.	•	•				556	0.25	0.75
6	3		Charlene Carter	Raymond James	Eugene, Ore.	•	•	•			271	1.5	2
7	N		William Kiefel	Merrill Lynch Wealth Mgmt	Portland, Ore.	•	•	•			737	1	5
8	7		Robert Coussens	UBS Financial Services	Portland, Ore.	•	•	•		•	600	1.25	4
9	N		David R. Roe	Merrill Lynch Wealth Mgmt	Portland, Ore.	•	•	•			737	1	5
10	10		Randall Stender	Merrill Lynch Wealth Mgmt	Eugene, Ore.	•	•	•			292	0.9	5
11	9		Blaine Werner	Merrill Lynch Wealth Mgmt	Eugene, Ore.	•	•	•	•		283	2	5
12	N		David Christian	Merrill Lynch Wealth Mgmt	Portland, Ore.	•	•	•	•	•	503	2.1	3.5