



**TIBURON STRATEGIC ADVISORS**

Strategy Consultants to Financial Institutions

*Financial Advisor Profiles Series*

**Tax & Financial Planning Accountant Profiles:  
Learning Best Practices by Profiling Leading Firms**

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Develop Appropriate Sales & Marketing Methodologies .....	
Build Necessary People & Technology Support Infrastructure .....	
Define Business Goals & Develop Written Plans .....	

Fee-Based Financial Advisor & Independent Broker/Dealer Reps Best Positioned for Success .....	
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Fee-Based Financial Advisors .....	
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Independent Broker/Dealer Reps.....	
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### **Benchmarking Categories View**

Target Markets.....	
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Products & Services.....	
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Sales & Marketing .....	
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Human Capital .....	
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Technology .....	
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### **Profiles of Leading Financial Planning Accountants**

Deloitte, Touche, & Tahamatsu CPAs .....	
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Ellen Boling's Team.....	
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Anthony DeCello's Team .....	
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Nancy Vella's Team.....	
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Bruce Weininger's Team.....	
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Ernst & Young CPAs.....	
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Michael Bearer's Team.....	
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Beltram Schaeffer's Team .....	
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KPMG CPAs .....	
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William Goldberg's Team.....	
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BKD CPAs .....	
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BKD Investment Advisors .....	
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Gelfond Hochstadt Pangburn CPAs .....	
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Gelfond Hochstadt Pangburn.....	
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Goldstein Enright Financial Advisors .....	
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Grant Thornton CPAs.....	
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Grant Thornton Accounting Firm.....	
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Other CPAs.....	
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Ted Alvarez.....	
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Asset Strategies.....	
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Jay Betzer.....	
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Cassaday & Company .....	
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Centermark Public Accountants & Consultants .....	
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Michael Chesser .....  
 John Clark .....  
 Clifton Gunderson Financial Services .....  
 Richard Courtier .....  
 Patricia Dudas .....  
 Delbert Exeter.....  
 Allen Farnum .....  
 Roy Faulkinbury.....  
 Frank, Rimerman, & Company .....  
 Frederiksen Crawford Financial Advisors .....  
 Lynn Freer .....  
 Goar, Endris & Walker .....  
 Hamel Associates .....  
 Sharon Ishizaki .....  
 James Shambo .....  
 Keats, Connelly, & Associates .....  
 Brian Kohute's Team .....  
 Rob Kosters .....  
 Lattimore, Black, Morgan, & Cain .....  
 J. Lenzinger .....  
 Steven Levey's Team .....  
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 Mitchell Freedman Accountancy .....  
 John O'Brien.....  
 Frank Ovanin .....  
 Donald Payne .....  
 Pitt, Ryan & Linnear.....  
 Plante & Moran Financial Services .....  
 Puckett Financial Advisors (Brian Puckett Retirement Advisors).....  
 Jack Robishaw .....  
 Rowling, Dold, & Associates .....  
 RSM McGladrey .....  
 Walter Saltzman .....  
 Schiffman, Grow, & Company.....  
 Schwartz & Hofflich.....  
 Tax & Financial Group .....  
 TaxNet.com .....  
 Vitale Caturano & Company .....  
 Jim Welton.....