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Contact Name	Firm	City & Contact Info	Credentials, Certifications and Degrees	Minimum Portfolio	Association(s)	Assets Managed	Yrs Exp	Fee and/or Commission Based
Ohio continued								
O'Dell, Jason M.	OJM Group	Cincinnati • (513) 791-7525 odell@ojmgroup.com • www.ojmgroup.com	MS	\$500K	FPA	\$300M	21	Fee Based
Roe, Daniel B.	Budros, Ruhlin & Roe Inc.	Columbus • (614) 481-6900 Droe@B-R-R.com • www.B-R-R.com	CFP®	\$500K	FPA, NAPFA, IMCA	\$1.8B	26	Fee Only
Ruhlin, Peggy M.	Budros, Ruhlin & Roe Inc.	Columbus • (614) 481-6900 pruhlin@B-R-R.com • www.B-R-R.com	CFP®, CPA, PFS	\$500K	FPA, NAPFA, AICPA	\$1B+	27	Fee Only
Sutliff, Brian T.	Summit Financial Strategies, Inc	Columbus • (614) 885-1115 brian@summitfin.com • www.summitfin.com	CFP®, ChFC®	\$300K	FPA, NAPFA	\$672M	20	Fee Only
Welsh, Eugene E.	Professional Management, Inc	Strongsville • (440) 572-5522 genew@professionalmanagementinc.com	CPA, PFS	\$250K	AICPA	\$100M	30	Fee Based
Oklahoma								
Owens, R. Todd	Baker Asset Management	Oklahoma City • (800) 937-2257 todd@bakerassetman.com	CFA®	\$500K	CFA Institute	\$100M	20+	Fee and Commission Based
Shoulders, Jana L.	Adams Hall Wealth Advisors	Tulsa • (918) 991-6910 • jana@adamshall.com	AEP, AIF®, CPA	\$250K	NAPFA	\$1.8B	31	Fee Only
Pennsylvania								
Amato, Michael J.	Independent Tax & Financial Planners, P.C.	Holland • (215) 354-0500 • www.ITFP.com	CFP®, CFS, CPA, PFS	No Minimum	FPA, AICPA	N/A	32	Fee and Commission Based
Burd, David A.	TGS Financial Advisors	Radnor • (610) 892-9900 • david@tgsfin.com www.tgsfin.com	CFP®	\$1M	FPA	\$115M+	35	Fee Based
DeMuth, Donald L.	Mighty Oak Strong America Investment Company	Mechanicsburgh • (717) 790-9001 don.mosaic@comcast.net Investwithmosaic.com	CFA®, CPA, MBA, PFS	\$100K	NAPFA, AICPA, CFA Institute, NSCHBC	\$73M	10+	Fee Only
Holtzman, James J.	Legend Financial Advisors, Inc	Pittsburgh • (412) 635-9210 legend@legend-financial.com www.legend-financial.com	CFP®, CPA	\$300K	FPA, AICPA	\$350M	15	Fee Only
Pearson, Diane M.	Legend Financial Advisors, Inc	Pittsburgh • (412) 635-9210 legend@legend-financial.com www.legend-financial.com	CFP®, PPC™, CDFA™	\$300K	FPA, NAPFA	\$350M	24	Fee Only
Petersen, Brady	Larson Financial Group	Pittsburgh • brady.petersen@larsonfinancial.com www.LarsonFinancial.com	None	Flexible	None	N/A	2	Fee Based or Commission Based
Stanasolovich, Louis P.	Legend Financial Advisors, Inc	Pittsburgh • (412) 635-9210 legend@legend-financial.com www.legend-financial.com	CFP®	\$300K	FPA, NAPFA, IMCA	\$350M	31	Fee Only
Rhode Island								
Jones, Shaun Michael	Diamond State Financial Group	Pawtucket • (302) 547-5447 shaun.jones@dsfg.com • www.dsfg.com	CFP®, CFS	\$250K	MDRT, NAIFA	\$30M	12	Fee Based
South Carolina								
 Armstrong, Regi	Armstrong Wealth Management Group	Florence • (843) 292-9997 armstrongwealth@lpl.com www.armstrongwealth.com	CPWA®	\$250K	FSI, IMCA	\$180M	16	Fee Based
LePew, Marsha G.	LePew Financial Services, Inc	Rock Hill • (803) 329-5125 marsha@lephew.com • www.lephew.com	CFP®, ChFC®, CPA, PFS	\$250K	NAPFA, AICPA	\$136M	20+	Fee Only
Pavia, Nicholas C.	Commonwealth Financial Group	Daniel Island • (843) 884-4545 Nick.Pavia@commonwealthfg.com	None	Flexible	FPA	\$10M	8	Fee Based
South Dakota								
Hallstrom, Mikael	Larson Financial Group	Sioux Falls mikael.hallstrom@larsonfinancial.com www.LarsonFinancial.com	None	Flexible	FPA	N/A	5	Fee Based or Commission Based

There are no listings for the following states: AK, AR, HI, ID, ME, MS, MT, OR, VT, WY