



# WEALTH MANAGEMENT *readers' choice*

*As the leader of a business,* it's your job to constantly look toward the future. Growth, acquisitions, mergers – these are the primary focus of the CEO. Yet, while you're looking forward, do you have someone watching your back? You've done the heavy lifting. Now you just need someone to secure the fruits of your labor. That's where your wealth manager comes in.

By providing guidance for both your personal and professional investments, wealth managers ensure that you'll be able to enjoy the dividends of your accomplishments for years to come. Wealth managers are much more than business partners – they're trusted advisers that are here to help for the long haul.

In the following pages, wealth managers from the Greater Philadelphia region are listed alphabetically by last name with their firm name and expertise. In addition, our readers let us know why they believe that their wealth manager is the best in the business.

*Compiled by Will Beaudouin*

**EDWARD BLUMENTHAL, executive vice president, accredited wealth management adviser**

**Stedmark Partners at Janney Montgomery Scott LLC**  
*Financial planning and wealth management*

"Ed and his expert team take a thoughtful, holistic, prudent and personalized approach to investment and financial planning." – **SCOTT FREEDMAN, president, Monitorforhire.com**

**CHRISTOPHER C. BRADLEY, CFP, senior vice president**

**The Bradley Group at UBS**  
*Financial wealth planning*

"Chris has done a tremendous job in helping Excellis with its financial planning and 401(k) programs." – **WAYNE SEMISCH, CEO, Excellis Interactive**

**MICHAEL C. BREE, CFP, CLU, ChFC, principal and co-founder**

**Pillar Wealth Advisors, LLC**  
*Financial planning*

"Mike has been a tremendous asset to both me and to my company by providing creative financial planning solutions in the areas of benefit plans, life insurance and wealth accumulation that have helped me achieve my personal and professional goals." – **ROBERT SIEGFRIED, president and CEO, The Siegfried Group**

**KIMBERLY J. BRUMBAUGH, LUTCF founder and CEO**

**Brumbaugh Wealth Management Group, an Office of MetLife**  
*Estate planning, wealth transfer, special needs planning and business succession planning*

"Kim Brumbaugh's outstanding strengths as a wealth management professional include her thorough knowledge of investment alternatives, absolute dedication to detail and follow up and, most importantly, her passion to do what is in the best interests of her clients." – **BRIAN THRELFALL, executive vice president of sales and marketing, Giorgio Foods, Inc.**

**JAMES DY, CFP, AAMS, AWMA, partner**

**Main Street Wealth Management, LLC**  
*Estate conservation and business succession*

"James is by far one of the most knowledgeable, intelligent and personable wealth advisers on the East Coast." – **VICTOR BARTON, CEO, Biz Dev Executives, LLC**

**ROBERT F. FISCHER, CPA, shareholder**

**Fischer, Cunnane & Associates, LTD**  
*Family, tax management and business advisory*

"Bob Fischer afforded me both short- and long-term strategies for managing our family's resources with tax-savvy options. His thoughtful recommendations and familiar style gained my trust and respect and assured me of the firm's highest fiduciary standards with my accounts." – **KAYTE CONNELLY, CSO, Best Principled Solutions LLC**

*Note: This list is based on readers' responses and does not reflect the opinions of SmartCEO magazine.*

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