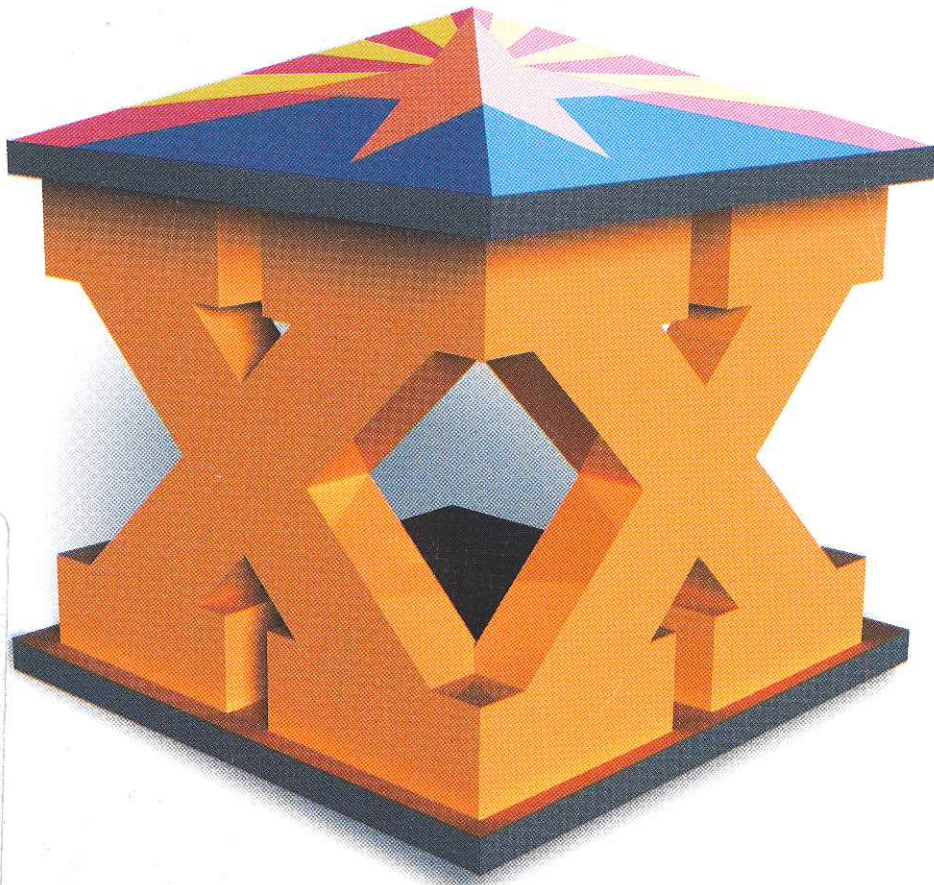


# RANKING

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# ARIZONA



20<sup>th</sup> Anniversary 1997-2017

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10  
last year

Front, from left: S. Taddie, D. Taddei, S. Rayner, S. Spagnola, R. Stern, M. Collum, C. Gibson. Back, from left: R. Elzholz, J. Reimer, P. LaMell, K. Taddie.  
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## STELLAR CAPITAL MANAGEMENT LLC

2200 E. Camelback Rd., #130, Phoenix, AZ 85016  
602-778-0307 · stellarmgt.com  
**Year Est:** 1984  
**Lic. Brokers:** 7  
**Principal(s):** Stephen Taddie

Stellar Capital Management provides professional custom-tailored investment management and exceptional personalized service. Its clients are a select group of people who seek a long-term, high-quality relationship with a stable investment firm staffed with talented and experienced people who care about providing the right solutions. The firm is well known in professional circles and has been a trusted investment fiduciary for decades. Stellar provides discretionary portfolio management for Individuals, Families, Charities, Foundations, Endowments, Retirement Plans, and Native American Indian Tribes, as well as discretionary, Section 3(38), and non-discretionary, Section 3(21), investment fiduciary services for Employer Sponsored 401(k) programs.

**COMPANY STRENGTHS:** "Most successful professional service firms are built on referrals. Stellar built its reputation on its seasoned professional staff that averages over 30 years of investment experience and its dedicated operational staff, one client at a time. The entire team takes its responsibilities seriously, and go the extra mile to improve client outcomes."

## 2 Versant Capital Management Inc.

2394 E. Camelback Rd., #100, Phoenix, AZ 85016  
602-635-3760 · versantcm.com  
**last year**  
**Year Est:** 2006 **Lic. Brokers:** 4  
**Principal(s):** Elizabeth Shabaker, COO  
**Special Services:** Investment advisory services, financial planning, special support in coordinating affairs with other professional advisors

## 3 MRA Associates

3200 E. Camelback Rd., #300, Phoenix, AZ 85018  
602-468-1232 · mraassociates.com  
**last year**  
**Year Est:** 1991 **Lic. Brokers:** 0  
**Principal(s):** M. Feldman, B. Lemon, C. Burroughs, K. Garrett, M. Rzepka, D. Westra, R. Bucklew, N. Erickson  
**Special Services:** Private wealth management, investment advisory, tax services

## 4 RBC Wealth Management, LLC

2398 E. Camelback Rd., #700, Phoenix, AZ 85016  
602-381-5300 · rbcwm-usa.com  
**last year**  
**Year Est:** 1909 **Lic. Brokers:** 48  
**Principal(s):** WND  
**Special Services:** Full-service wealth management firm

## 5 Raymond James Scottsdale

14850 N. Scottsdale Rd., #155, Scottsdale, AZ 85254  
480-365-6880 · raymondjamesaz.com  
**last year**  
**Year Est:** 1962 **Lic. Brokers:** 40  
**Principal(s):** Tom La Porte, managing director, Scottsdale complex manager  
**Special Services:** Personalized financial guidance, financial and estate planning, portfolio management, trust services, banking services

## 6 Thompson Wealth Management

17470 N. Pacesetter Way, Scottsdale, AZ 85255  
877-619-8001 · twmpln.com  
**last year**  
**Year Est:** 2010 **Lic. Brokers:** 2  
**Principal(s):** Neal Thompson  
**Special Services:** Financial planning, retirement strategies and investment management services

## 7 First Financial Equity Corporation

7373 N. Scottsdale Rd., #D-120, Scottsdale, AZ 85253  
480-951-0079 · ffec.com  
**last year**  
**Year Est:** 1985 **Lic. Brokers:** 92  
**Principal(s):** George E. Fischer, president  
**Special Services:** Estate/retirement planning, stocks and bond, corporate retirement plans

## 8 Keystone Wealth Partners

3115 S. Price Rd., Chandler, AZ 85248  
480-782-1034 · keystonewealthpartners.com  
**last year**  
**Year Est:** 2014 **Lic. Brokers:** 2  
**Principal(s):** WND  
**Special Services:** Specializes in independent, objective financial advice, estate planning and tax planning

## 9 Stonegate Capital Advisors

7373 N. Scottsdale Rd., #D245, Scottsdale, AZ 85253  
602-953-8450 · stonegateprivateclient.com  
**last year**  
**Year Est:** 2002 **Lic. Brokers:** 5  
**Principal(s):** Jameson Van Houten, CEO  
**Special Services:** Wealth management, investment portfolio services, business and personal tax planning, estate and family wealth planning

## 10 BNY Mellon Wealth Management

2415 E. Camelback Rd., Ste #700, Phoenix, 85016  
602-258-1875 · bnymellonwealthmanagement.com  
**last year**  
**Year Est:** 1784 **Lic. Brokers:** WND  
**Principal(s):** Robert Martin, regional president; Chad Maze, senior director  
**Special Services:** Protecting and growing your wealth with customized strategies and services