

100 Best Financial Advisors

Epstein recognized in *Barron's* ranking

David Epstein, a Managing Director and Financial Advisor in Baird's Milwaukee office, has been recognized among the top 100 financial advisors at brokerage houses and banks nationwide in an article published April 22 in *Barron's*.

R.J. Shook, an independent researcher and author of the *Winner's Circle* books, compiled the list for *Barron's*.

Shook pored over the more than 7,000 nominations for this year's list, scrutinizing the financial advisors' regulatory and internal records, and interviewing their colleagues and clients, *Barron's* noted. The final 100 top financial advisors are those who have the most assets under management and who Shook believes follow the industry's best practices.

David has been a financial advisor at Baird for 22 years and has been the top-performing financial advisor in Baird's Private Client Group for the past five years. He has ranked among Baird's top 10% of Financial Advisors for 13 years.

"Our mission is to operate a comprehensive wealth management practice, with a highly qualified team, in order to provide the most professional, reliable and consistent financial advice to our clients," said David.

"We work with wealthy families across generations to preserve and transfer wealth to the next generation or back to the community," he added. "We help people avoid making bad financial decisions. Some relationships that have transitioned to our team have been with the firm for four decades."

"David is extraordinarily dedicated to his clients," said Mike Schroeder, Director of the Private Client Group.

"As our industry continues to change, David has put together a first-rate team that delivers the type of expertise and outstanding service that clients increasingly demand," Mike added.

In fact, the Epstein Calvelli team – consisting of David, Senior Investment Consultant Chris Calvelli and Registered Client Relationship Associates Monica Mullen and Jaci Mueller – won the Private Client Group's 2004 Team Award for the Central Region.

"It should come as no surprise that David is one of the top 100 financial advisors in the country," said Pat Powell, Managing Director and Milwaukee Branch Manager. "He places his clients' interests first, his work ethic is second to none and he has assembled a talented and energetic team that shares his passion for excellence."

David and the other winners will be featured in Shook's upcoming *Winner's Circle* books.