



# Oklahoma's Financial Advisors

*Oklahoma Magazine* presents the 2009 directory of the state's leading financial professionals along with sound recommendations for choosing the right advisor to handle your money.

Nominating Firm	Advisor/Manager Name	Assets Under Management	Yrs. Experience	Title	City	Certifications	Individuals	Business	Foundations/Endowments	Retirement	Found on Page
Pinnacle Investment Advisors	Joel Kantor	\$41,000,000	27	Portfolio Manager	Tulsa	CFP	•	•	•	•	
Pinnacle Investment Advisors	R. Brett Kramer	\$350,000,000	24	Managing Partner	Tulsa	CPA, CFA	•	•	•	•	
Pinnacle Investment Advisors	David M. Poarch	\$350,000,000	26	Managing Partner	Tulsa		•	•	•	•	
Pinnacle Investment Advisors	Julie L. Skye	\$24,000,000	20	Portfolio Manager	Tulsa		•	•	•	•	
Puckett Financial Advisors	Dennis Packard	\$105,000,000	12	Financial Advisor	Oklahoma City		•	•	•	•	
Puckett Financial Advisors	Brian Puckett		17	Financial Advisor	Oklahoma City	CFP, CPA, PFS, JD	•	•	•	•	
Raymond James Financial Services	Mike Mazzei	\$76,000,000	20	Branch Manager	Tulsa	CFP	•	•	•	•	
Raymond James Financial Services	David Moore	\$63,000,000	19	Certified Financial Planner	Tulsa	RFC	•	•	•	•	
Raymond James Financial Services	Derrick Sands	\$89,000,000	10	Certified Financial Planner	Tulsa	CFP, CLU, ChFC	•	•	•	•	
<b>Retirement Investment Advisors</b>	<b>Tracy A. Atwood</b>	<b>\$19,520,000</b>	<b>21</b>	<b>Executive VP</b>	<b>Oklahoma City</b>	<b>CFP, RFC, Series 7, 63, 65, 8, 24, 4, 53 and Insurance</b>	•	•	•	•	<b>130</b>
<b>Retirement Investment Advisors</b>	<b>Joseph Bowie</b>	<b>\$112,642,000</b>	<b>20</b>	<b>Co-Pres. and CEO</b>	<b>Oklahoma City</b>	<b>CFP, Series 65</b>	•	•	•	•	<b>130</b>
<b>Retirement Investment Advisors</b>	<b>Carol Ringrose Alexander</b>	<b>\$64,942,000</b>		<b>Executive VP</b>	<b>Oklahoma City</b>	<b>CFP, AIF, Series 7, 63, 65</b>	•	•	•	•	<b>130</b>
<b>Retirement Investment Advisors</b>	<b>Randy Thurman</b>	<b>\$116,364,000</b>	<b>19</b>	<b>Co-Pres. and CFO</b>	<b>Oklahoma City</b>	<b>CFP, CPA, PFS, NFLPA, Series 7, 63</b>	•	•	•	•	<b>130</b>
Southwest Financial Service	David A. Cole	\$100,000,000	38	Managing Partner	Tulsa	CPA, Personal Financial Specialist	•	•	•	•	
The Private Bank at Bank of Oklahoma	Todd Hoffman	\$600,000,000	16	Client Advisor	Tulsa	Certified Family Business Specialist, Series 7, 24, 63, 66	•	•	•	•	
The Private Bank at Bank of Oklahoma	John Howk		23	Trust Officer	Tulsa	Chartered Wealth Manager, Certified Trust and Financial Advisor, Series 7, 63, 65	•	•	•	•	
Tom Johnson Investment Management	Douglas A. Haws	\$432,700,000	14	VP and Portfolio Manager	Oklahoma City	CFA	•	•	•	•	
Tom Johnson Investment Management	Richard H. Parry		27	Pres. and Chief Investment Officer	Oklahoma City	CFA	•	•	•	•	
Tom Johnson Investment Management	Cory J. Robinson		8	Trader and Portfolio Manager	Oklahoma City	CFA, Financial Risk Manager	•	•	•	•	
Tom Johnson Investment Management	Steven G. Schenk		24	VP and Portfolio Manager	Oklahoma City	CFA	•	•	•	•	
Tom Johnson Investment Management	Edward L. (Ned) Schrems		24	VP and Portfolio Manager	Oklahoma City	CFA	•	•	•	•	
UBS Financial Services	Christopher Derr	\$158,000,000	25	Senior VP – Investments	Tulsa		•	•	•	•	
<b>UBS Financial Services</b>	<b>Norman P. Fisher</b>	<b>\$209,000,000, \$200,000,000 external</b>	<b>28</b>	<b>Senior VP – Investments</b>	<b>Tulsa</b>	<b>CIMA, Senior Institutional Consulting Group Program</b>	•	•	•	•	<b>128</b>
UBS Financial Services	Donald R. Jackson	\$190,000,000, \$20,000,000 external	15	Senior VP – Investments	Tulsa	CFP, CIMA	•	•	•	•	
<b>UBS Financial Services</b>	<b>Bryan Johnson</b>	<b>\$297,000,000</b>	<b>28</b>	<b>Senior VP – Investments</b>	<b>Tulsa</b>		•	•	•	•	<b>129</b>
UBS Financial Services	Chris K. Meyers	\$150,000,000	19	CIMA, First VP	Oklahoma City	CIMA	•	•	•	•	
UBS Financial Services	Allen F. Staples	\$225,000,000	26	Senior VP, Investments, Corporate Services; Financial Advisor	Oklahoma City	CFP, Series 7, 63, 65	•	•	•	•	