

TOP 100 WOMEN FINANCIAL ADVISORS 2022

# BARRON'S

JUNE 20, 2022



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## 2022 Top 100 Women Financial Advisors

Here are America's Top Women Financial Advisors, as identified by *Barron's*. The ranking reflects the volume of assets overseen by the advisors and their teams, revenue generated for their firms, and the quality of the advisors' practices. An "N" indicates that the advisor wasn't ranked in that year.

Rank		Name	Firm	City	Client Types			Total Assets (\$mil)	Typical Account Size (\$mil)	Typical Net Worth (\$mil)
2022	2021				Individuals (Up to \$1 mil)	High Net Worth (\$1-10 mil)	Ultrahigh Net Worth (\$10 mil+)			
43	59	Carolyn Taylor	Weatherly Asset Management	Del Mar, Calif.		•	•	1,158	3.1	4.4

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# The Top 100 Women Financial Advisors for 2022

*The following has been excerpted*

## By Steve Garmhausen

For readers looking to find their match, our Top 100 Women ranking is a good place to start. The list reflects assets under management, revenue the advisors generate for their firms, and quality of their practices. Investment performance isn't an explicit criterion because clients pursue a range of goals, and achieving the highest returns isn't always first on the list. In many instances, asset preservation is the primary goal.

Although the financial advisor indus-

try remains overwhelmingly white and male, younger advisors entering the field are slowly changing that. Women hold just under a quarter of the respected Certified Financial Planner designations. Out of 92,055 CFP holders at the end of 2021, 21,504 were women, up 4% from 2020. The number of Black CFPs increased by more than 10%, and they now make up 1.8% of all holders. Hispanic CFPs now make up 2.7% of all holders, and their ranks grew by more than 15%.

Such progress could help to attract clients who had avoided working with

an advisor because of the industry's homogeneity. One reason the industry is growing more diverse is its shift in recent years away from the traditional single-practitioner model and toward teams.

It stands to reason that if you click with your advisor, you're more likely to heed their advice. And as advisor diversity grows, it's becoming easier to find wealth managers with strong skills and experience who also provide a good demographic fit.



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Criteria included AUM as of 03/31/2022, revenue, regulatory record, quality of the advisor's practices, and philanthropic work. Carolyn Taylor was invited by Barron's to participate in the nomination process and nominated by colleagues. 1,043 applications were submitted for consideration for the Top 100 Women ranking; Carolyn was ranked 43rd. Barron's uses a proprietary method to rank advisors based on the criteria above. Weatherly provides this data to Barron's in the form of a survey response. Publicly available data is verified by Barron's against SEC and FINRA reports. For further details on the methodology, please visit <https://www.weatherlyassetmgt.com/adv/>

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