

LARGEST MONEY MANAGERS

RANKED BY ASSETS UNDER MANAGEMENT LOCALLY

Rank	Company Address Phone/Web site	Total assets under management with discretion (millions) as of 4/30		Assets tax-exempt (millions)	Minimum account (thousands)		Portfolio analysts on staff 4/2007	Asset mix (percent)				Chief investment officer Top local executive
		2007	2006		Collective	Individual		Stocks	Bonds	Cash	Other	
1	VICTORY CAPITAL MANAGEMENT INC. 127 Public Square, Cleveland 44114 (216) 689-4400/www.victoryconnect.com	\$60,922.0	\$57,988.0	\$53,418.0	\$5,000.0	\$1,000.0	55	41%	27%	32%	0	NA Robert L. Wagner
2	NATIONAL CITY PRIVATE CLIENT GROUP 1900 E. Ninth St., Cleveland 44114 (216) 222-2000/www.nationalcity.com	\$32,372.8	\$31,699.2	\$4,281.2	\$750.0	\$750.0	80	75%	19%	6%	0	Timothy L. Swanson Timothy J. Lathe
3	ALLEGIANT ASSET MANAGEMENT CO. 200 Public Square, Cleveland 44114 216-222-8699/www.allegiantassetmanagement.com	\$29,361.2	\$26,384.1	\$28,564.1	\$1,000.0	\$5,000.0	42	26%	27%	34%	13	NA John G. Abunassar
4	FIFTH THIRD ASSET MANAGEMENT INC. 600 Superior Ave. East, Cleveland 44114 800-786-8651/www.ftam.com	\$3,877.1	\$3,200.6	\$3,469.9	\$1,000,000.0	\$100,000.0	13	96%	0%	4%	0	E. Keith Wirtz James Kirk
5	SKY TRUST NA (1) 30050 Chagrin Blvd., Suite 150, Pepper Pike 44124 (216) 206-1999/www.skyfi.com	\$3,533.0	\$3,002.0	\$75.0	\$200.0	\$200.0	13	61%	31%	0%	8	Stephen Schenosky John Gulas
6	BOYD WATTERSON ASSET MANAGEMENT LLC 1801 E. Ninth St., Suite 1400, Cleveland 44114 (216) 771-3450/www.boydwatterson.com	\$3,119.2	\$3,054.6	\$2,431.0	\$5,000.0	\$100.0	13	12%	80%	8%	0	Clyde E. Bartter, Brian L. Gevry Clyde E. Bartter, Timothy M. Hyland, Brian L. Gevry
7	FIRSTMERIT BANK NA 106 S. Main St., Akron 44308 (888) 384-6388/www.firstmerit.com	\$2,620.0	\$2,540.0	\$705.6	\$0.0	\$500.0	14	54%	46%	0%	0	Robert M. Leggett Diana L. Hogg
8	LINCOLN FINANCIAL ADVISORS/SAGEMARK CONSULTING 28601 Chagrin Blvd., Ste. 300, Cleveland 44122 (216) 765-7400/www.lfa-sagemark.com	\$2,244.0	\$2,199.0	NA	NA	NA	4	45%	30%	10%	15	Ben Huddle, Tim Johnson Jeffrey Concepcion
9	BNY MELLON WEALTH MANAGEMENT 30195 Chagrin Blvd., Suite 350W, Cleveland 44124 (216) 464-4244/www.bnymellon.com	\$1,912.0	\$1,764.0	NA	\$1,000.0	\$1,000.0	12	60%	40%	0%	0	NA William G. Caster
10	GLENMEDE TRUST CO. 25825 Science Park Drive, Suite 110, Beachwood 44122 (216) 378-2900/www.glenmede.com	\$1,863.2	\$1,642.8	\$120.3	\$3,000.0	\$3,000.0	4	58%	25%	8%	9	Gordon B. Fowler Frank I. Harding
11	HUNTINGTON NATIONAL BANK 917 Euclid Ave., Suite 200, Cleveland 44115 (216) 515-6532/www.huntington.com	\$963.0	NA	\$174.0	\$100.0	\$300.0	36	41%	55%	4%	0	Chris Cwiklinski, Craig Hardy Jerry Kelsheimer
12	ANCORA ADVISORS LLC 2000 Auburn Drive, Suite 300, Cleveland 44122 (216) 825-4000/www.ancora.ws	\$961.2	\$842.8	\$105.8	\$1,000.0	\$1,000.0	5	27%	65%	8%	0	Denis J. Amato Frederick D. DiSanto
13	MAI WEALTH ADVISORS LLC 1360 E. Ninth St., Suite 1100, Cleveland 44114-1782 (216) 436-3500/www.maiwealth.com	\$853.1	\$1,230.9	\$163.8	NA	\$500.0	6	56%	37%	6%	1	Gerald H. Gray Richard J. Buoncore
14	WASMER, SCHROEDER & CO. 1111 Superior Ave., Suite 965, Cleveland 44114 (216) 622-0000/www.wasmerschroeder.com	\$664.0	\$435.0	\$565.0	NA	\$500.0	4	2%	93%	0%	5	NA John Majoros, Tom Richmond
15	LAKEPOINT INVESTMENT PARTNERS LLC 1100 Superior Ave., Suite 1325, Cleveland 44114 (216) 621-6001/www.lakepoint.org	\$586.0	\$561.0	\$188.0	\$500.0	\$500.0	4	76%	17%	7%	0	Mary Lynn Laughlin, Douglas Y. Wang Mary Lynn Laughlin, Douglas Y. Wang
16	BEAR STEARNS (2) 3201 Enterprise Parkway, Beachwood 44122 216-831-1503/www.bearstearns.com	\$500.0	\$0.0	\$122.0	\$1,000.0	\$1,000.0	3	50%	20%	15%	15	Phillip Irvin Michael Zweig
17	NORTHERN TRUST BANK 127 Public Square, Suite 5150, Cleveland 44114 (216) 566-5415/www.northerntrust.com	\$484.0	\$442.0	NA	\$1,000.0	\$1,000.0	2	65%	27%	6%	2	John D. Southworth Michael A. Cogan
18	GREENLEAF CAPITAL MANAGEMENT 20600 Chagrin Blvd., Shaker Heights 44122 (216) 752-8900/www.greenleafcapital.com	\$446.6	\$407.3	\$140.4	NA	\$1,000.0	7	59%	32%	10%	0	Richard L. Alt, James A. Blue Geoffrey J. Greenleaf
19	GOODE INVESTMENT MANAGEMENT INC. 50 Public Square, Suite 1700, Cleveland 44113 (216) 771-9000/www.goodeinvestment.com	\$426.7	\$438.3	\$426.7	NA	NA	2	0%	100%	0%	0	Bruce T. Goode Bruce T. Goode
20	WINSLOW ASSET MANAGEMENT INC. 25201 Chagrin Blvd., Suite 185, Beachwood 44122 (216) 360-4700/www.winslowasset.com	\$394.0	\$336.6	\$271.0	\$2,000.0	\$2,000.0	4	76%	17%	7%	0	Gerald W. Goldberg, Walter J. Henry Gerald W. Goldberg, Susan Akers
21	SPERO-SMITH INVESTMENT ADVISERS INC. 3601 Green Road, Suite 102, Beachwood 44122 (216) 464-6266/www.sperosmith.com	\$355.1	\$316.4	\$119.2	\$500.0	\$500.0	5	68%	18%	14%	0	Mary E. Lord Robert C. Smith
22	NORTH POINT PORTFOLIO MANAGERS CORP. 5910 Landerbrook Drive, Suite 160, Mayfield Heights 44124 (440) 720-1100	\$353.9	\$306.7	\$234.7	NA	\$1,000.0	3	69%	31%	0%	0	Diane M. Stack Ronald J. Lang
23	SEQUOIA FINANCIAL GROUP LLC 121 S. Main St., Suite 300, Akron 44314 (330) 375-9480/www.sequoia-financial.com	\$353.0	\$288.0	NA	\$500.0	\$500.0	2	58%	37%	5%	0	Darian Chen Tom A. Haight
24	RAV FINANCIAL SERVICES, LLC 2000 Auburn Drive, Suite 310, Beachwood 44122 (216) 831-4900/www.ravfinancial.com	\$307.0	\$282.0	\$131.0	\$500.0	\$500.0	3	60%	15%	10%	15	David M. Taucher Robert A. Valente
25	FIRST FIDUCIARY INVESTMENT COUNSEL 1375 E. Ninth St., Suite 2450, Cleveland 44114 (216) 623-7700/www.firstfiduciary.com	\$291.0	\$263.0	NA	\$250.0	\$250.0	4	88%	4%	8%	0	Mary F. Anderson Mary F. Anderson
26	CARNEGIE CAPITAL ASSET MANAGEMENT CO. 1228 Euclid Ave., Suite 1100, Cleveland 44115 (216) 781-4440/www.carnegie-capital.com	\$243.5	\$191.8	NA	\$250.0	\$250.0	5	65%	30%	5%	0	James W. Chandler George R. Mateyo
27	LORAIN NATIONAL BANK 457 Broadway Ave., Lorain 44052 (440) 244-6000/www.4lnb.com	\$208.9	NA	\$10.3	\$50.0	\$100.0	NA	58%	35%	5%	2	Craig J. Berteau Craig J. Berteau, Daniel E. Klimas

Source: Information is supplied by the companies unless footnoted. Crain's Cleveland Business does not independently verify the information and there is no guarantee these listings are complete or accurate. We welcome all responses to our lists and will include omitted information or clarifications in coming issues. Business lists and The Book of Lists are available to purchase at www.craainscleveland.com (1) Acquired by Huntington Bancshares Inc. on July 1, 2007. (2) The Cleveland office opened in Feb. 2007.

RESEARCHED BY Deborah W. Hillyer