Ranked by number of financial planners in the county. Listed alphabetically in event of tie.

Rank	Name Address Area code: 203, unless otherwise noted Website	Top local executive Contact (bold) Email address Year firm established	Number of financial planners in county	Average AUM per client ($) Minimum annual fee ($)	Total AUM ($)	fee based	commission based	fee and commission based	estate planning	family and legal	investment management	philanthropy	risk management	tax planning	Other
						Planning/management services offered									
1	**Barnum Financial Group** (An office of MetLife) 6 Corporate Drive, Shelton 06484 513-6000 • barnumfinancialgroup.com	Paul Blanco pblanco@metlife.com 1950	51 (15 additional advisors in Westchester County, N.Y.)	WND	10 billion				✔	✔	✔	✔	✔	✔	Retirement planning, special needs planning, financial education, corporate benefits and business planning
2	**Northwestern Mutual - Stamford** 400 Atlantic St., Suite 3, Stamford 06901 653-2100 • stamford.nm.com	J. Philip Bender phil.bender@nmfn.com 1857	40	WND	265.2 million			✔	✔		✔		✔		Retirement, college, estate, corporate/small-business benefits, investments, risk management, and insurance, including life, long-term care and disability annuities
3	**Northwestern Mutual Financial - Fairfield** 1 Elliot Place, Suite 200, Fairfield 06824 259-3377 • fairfield.nm.com	Leonard DiCostanzo len.dicostanzo@nmfn.com 1857	35	WND	156.4 million			✔	✔		✔		✔		Retirement, college, estate, corporate/small-business benefits, investments, risk management, and insurance, including life, long-term care and disability annuities
4	**Janney Montgomery Scott LLC *** 2150 Post Road, Second floor, Fairfield 06824 • 256-1122 800 Post Road, Second floor, Darien 06820 • 655-8266 janney.com	Chris Wilkinson cwilkinson@janney.com 1832	22	183,000 NA	52.6 billion			✔	✔		✔	✔	✔	✔	Retirement income planning
5	**Northwestern Mutual Financial - Westport** 274 Riverside Drive, Fourth floor, Westport 06880 221-5200 • westport.nm.com	Mary Grace Lundstrom mary.lundstrom@nm.com 1857	20	WND	377.4 million			✔	✔		✔		✔		Retirement, college, estate, corporate/small business benefits, investments, risk management, and insurance, including life, long-term care and disability annuities
6	**HTG Investment Advisors Inc. *** 50 Locust Ave., New Canaan 06840 972-8262 • htginvestmentadvisors.com	H. Thomas Gnuse Allison Donaldson allison@htgadvisors.com 1993	7	1.6 million $3,000 for investment-only, $6,000 for financial planning	437 million	✔					✔				Retirement planning, college savings, charitable giving strategies and trust management
7	**Resnick Advisors** 20 Ketchum St., Westport 06880 226-8262 • resnickadvisors.com	Jay Caraviello Joanne Bock jbock@resnickadvisors.com 1990	6	WND	785 million	✔					✔				Financial planning and wealth management
8	**Reby Advisors LLC *** 44 Old Ridgebury Road, Danbury 06810 790-4949 • rebyadvisors.com	Bob Reby Laurie Ham laurie@rebyadvisors.com 1985	5	750,000 WND	350 million	✔			✔	✔	✔	✔	✔	✔	Estate planning, tax planning, insurance review, health care, bereavement, life insurance, retirement planning, family wealth preservation, education planning, charitable giving, income tax minimization, generational wealth and mortgage consultation
	Relyea Zuckerberg Hanson LLC 1 Landmark Square, Stamford 06901 355-0880 • rzhadvisors.com	Carl Zuckerberg carlz@rzhadvisors.com 2000	5	5 million 0	700 million	✔			✔	✔	✔	✔	✔	✔	Fiduciary trust management and divorce financial counseling
	Westport Resources 55 Greens Farm Road, Westport 06880 226-0222 • westportresources.com	John A. Vaccaro Ashley Schexnaildre finance@westportresources.com 1987	5	3 million 0	1.1 billion			✔	✔		✔	✔			Family office services
9	**Advanced Financial Advisors LLC *** Landmark Office Center 2 Old New Milford Road, Suite 3F, Brookfield 06804 796-0082 • planafa.com	John L. O'Brien Elizabeth Castellano elizabeth.castellano@lfg.com 1991	4	1.3 million 0	55 million			✔	✔		✔	✔	✔	✔	Financial, retirement and college planning
	LLBH Private Wealth Management LLC 33 Riverside Ave., Fifth floor, Westport 06880 683-1530 • llbhpwm.com	Jim Pratt-Heaney Courtney Davies cdavies@llbhpwm.com 2008	4	3-5 million 0	1.6 billion	✔			✔	✔	✔	✔	✔	✔	Next-generation and wealth transfer, risk management, asset protection, global custody, corporate services, offshore/captive insurance
10	**RDM Financial Group Inc. *** 1555 Post Road East, Westport 06880 255-0222 • rdmfinancial.com	Ronald D. Weiner Jill Bodossian rdm@rdmfinancial.com 1994	3	WND	600 million	✔					✔		✔		Business-succession planning, intergenerational wealth transition, executive benefits, life insurance analysis and planning, pension and defined contribution planning, individual retirement distribution and retirement income planning, health care and special-needs planning
11	**Tuttle Wealth Management LLC *** 1 Stamford Plaza, 263 Tresser Blvd., Ninth floor, Stamford 06901 888-723-2821 • tuttletactical.com	Matthew Tuttle mtuttle@tactical.com 2003	2	WND	200 million	✔					✔				Financial advisors, insurance agents and financial planners

This list is a sampling of financial planners and wealth management firms serving the region. If you wish your firm to be included in our next listing, please contact Danielle Renda at drenda@westfairinc.com.

NA Not available
WND Would not disclose.
* Information from the 2014 listing and updated using company websites when possible.