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BusinessWeek

Financial Advisers' Best Ideas

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Insights from veteran advisers

By Karyn McCormack and Lauren Young

When it comes to selecting a financial adviser fancy academic degrees, posh offices, and a big client portfolio may be impressive, but knowledge and skill are what distinguish an outstanding adviser from a good adviser. "Anybody who claims to be an expert in investing had better have a lot of experience," says Jack Waymire, founder of the Paladin Registry, a service that ranks financial advisers for individual investors.

BusinessWeek asked Waymire to comb the Paladin database of more than 1,000 independent financial advisers for the most seasoned pros. Advisers, who are scored on a 100-point system, receive the maximum number of points for 15 years of experience. (Many of the top-ranked advisers on *BusinessWeek's* list have 20-plus years in the trenches.) They also get top scores if they hold at least two major certifications, such as Chartered Financial Analyst and Certified Financial Planner.

To be included in the registry, advisers need to have a clean compliance record. They must be independent with fees as the primary form of compensation.

The search yielded 50 advisers with a combined almost 900 years of experience. *BusinessWeek* spoke with 14 of these veteran advisers about how they are positioning their client's portfolios right now.

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Leslie Merrithew
Merrithew & Thorsten in San Diego

Merrithew believes in diversifying by taking stakes in alternative asset classes like commodities—he likes the Pimco Commodity Real Return Fund. When the stock market rebounds, Merrithew and his partner, Brandon Thorsten, who have a combined 35 years of expertise, expect large companies to lead the way. Funds that stand to gain from a large-cap rally, he says, include Mairs and Power Growth Fund, Tweedy Browne Value Fund, Thornburg Value, and Oakmark Select.

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