

Money managers

(Ranked by assets under management)

'07 Rank	Name Address	Phone Fax Web	Assets under management*	Assets allocation: actively managed U.S. equities*/U.S. fixed income*	Number of local employees	Type of investment manager	Local executive/ Title
1.	Delaware Investments 2005 Market St. Philadelphia, Pa. 19103 www.delawareinvestments.com	215-255-1200 NA	\$165,000	\$63,000 \$102,000	650	Diversified asset management firm	Partick Coyne president
2.	Aronson+Johnson+Ortiz 230 S. Broad St. Philadelphia, Pa. 19102 www.ajopartners.com	215-546-7500 215-546-7506	\$30,600	\$30,600 \$0	36	Independent	Theodore Aronson managing principal
3.	Glenmede 1650 Market St., Suite 1200 Philadelphia, Pa. 19103 www.glenmede.com	215-419-6000 215-419-6196	\$20,000	\$11,600 \$4,400	200	Specialize in wealth advisory services for private clients and asset management for institutions	A. E. (Al) Piscopo president/CEO
4.	Philadelphia International Advisors 1650 Market St., Suite 1400 Philadelphia, Pa. 19103 www.piadvisors.net	215-419-6704 NA	\$10,100	WND WND	34	Active international equities	Andy Williams CIO, lead portfolio manager
5.	Cooke & Bieler 1700 Market St. Philadelphia, Pa. 19103 www.cooke-bieler.com	215-567-1101 215-567-1681	\$9,596.4	\$9,483.3 \$113,100	30	Value	Samuel Ballam partner
6.	Schneider Capital Management 460 E. Swedesford Road Wayne, Pa. 19087 www.schneidercap.com	610-687-8080 610-687-6218	\$6,500	\$6,500 \$0	22	Independent institutional investment manager	Arnold Schneider president/CIO
7.	Chartwell Investment Partners 1235 Westlakes Drive, Suite 400 Berwyn, Pa. 19312 www.chartwellip.com	610-296-1400 610-296-1430	\$5,427	\$4,117 \$1,310	54	Independent investment adviser	Timothy Riddle managing partner/CEO
8.	PENN Capital Management Co. Inc. 457 Haddonfield Road Cherry Hill, N.J. 08002 www.penncapital.com	856-910-8181 856-910-8153	\$5,093	\$4,065 \$1,027	42	Equity and high-yield fixed income	Richard Hocker founder/chief investment officer
9.	BPG Properties 3000 Centre Square West, 1500 Market St. Philadelphia, Pa. 19102 www.bpgltd.com	215-496-0400 215-496-0431	\$5,000	NA NA	150	Private equity real estate fund manager	Daniel DiLella president/CEO
10.	myCIO Wealth Partners 2929 Cira Centre Philadelphia, Pa. 19104 www.myciowp.com/	267-295-2280 267-295-2279	\$4,300	\$2,000 \$1,400	21	Wealth manager with specialty in long/short equity	David Lees senior partner
11.	Haverford Trust Co. 3 Radnor Corporate Center Radnor, Pa. 19087 www.haverfordtrust.com	610-995-8700 610-995-8796	\$4,000	\$3,000 \$1,000	65	Quality growth	Joseph McLaughlin president
12.	Rittenhouse Asset Management Inc. 5 Radnor Corporate Center Radnor, Pa. 19087 www.nuveen.com/rittenhouse/	800-847-6369 610-293-2444	\$3,300	\$2,100 \$372	25	Large-cap growth	Michael Lewers managing director
13.	Bryn Mawr Trust Wealth Management 10 S. Bryn Mawr Ave. Bryn Mawr, Pa. 19010 www.bmtc.com	800-268-5005 610-526-2076	\$2,500	\$900 \$600	50	Asset allocator	Matthew Waschull EVP
14.	Church Capital Management 301 Oxford Valley Road Yardley, Pa. 19067 www.churchcapital.com	215-321-1900 215-321-1903	\$2,300	\$1,500 \$800	13	Growth at a reasonable price	Gregory Church CEO
15.	Logan Capital Management 6 Coulter Ave., Suburban Square Ardmore, Pa. 19003 www.logancapital.com	215-569-1100 215-851-9444	\$1,500	\$1,245 \$255	23	Registered investment manager	David Harrison chairman
TIE	Pennsylvania Trust Co. 5 Radnor Corporate Center Radnor, Pa. 19087 www.penitrust.com	610-975-4300 610-975-4324	\$1,500	\$1,000 \$500	36	Core manager	Richardson Merriman CEO
TIE	Rorer Asset Management 8 Tower Bridge Conshohocken, Pa. 19428 www.rorerasset.com	484-530-4300 484-530-3830	\$1,500	\$1,400 \$100	15	Relative value	Edward Rorer chairman
18.	Swarthmore Group Inc. 1717 Arch St., Suite 3810 Philadelphia, Pa. 19103 www.swarthmoregroup.com	215-557-9300 215-557-9305	\$1,495	\$816.5 \$678.7	15	Active	Paula Mandle president/CEO
19.	Millennium Wealth Management and Private Banking 30 Valley Stream Pkwy. Malvern, Pa. 19355 www.mwmpb.com	610-993-7500 610-993-8500	\$904	\$556.2 \$330.1	45	WND	John Eisele President
20.	BCG Securities Inc. 600 Delran Parkway Delran, N.J. 08036 www.bcgsecurities.com	888-394-2247 856-824-1475	\$350	\$123 \$2	23	Independent advisory firm, specializing in retirement plans	Robert Paglione CEO
21.	Coho Partners Ltd. 1 Tower Bridge, 100 Front St. W. Conshohocken, Pa. 19428 www.cohopartners.com	610-834-8001 610-834-0995	\$330	WND \$0	7	Large/mid-cap stable growth	Peter Thompson founder/ chief investment officer
22.	Blue Bell Private Wealth Management 470 Norristown Road, Suite 305 Blue Bell, Pa. 19422 www.bluebellpwm.com	610-825-3540 610-825-9690	\$300	\$285 \$15	9	Independent/RIA	Scott Miller chief investment officer/managing partner
23.	Key Financial Inc. 1560 McDaniel Drive West Chester, Pa. 19380 www.keyfinancialinc.com	610-429-9050 610-429-9279	\$271.8	\$193 \$78.8	10	Asset allocation	Patricia Brennan president
24.	TGS Financial Advisors 170 N. Radnor Chester Road, Suite 110 Radnor, Pa. 19087 www.tgsfinancial.com	610-892-9900 610-892-9830	\$220	\$80 \$50	15	Tactical asset allocation	David Burd registered representative
25.	Aberdeen Asset Management 1735 Market St., 37th Floor Philadelphia, Pa. 19103 www.aberdeen-asset.com	215-405-5700 215-405-2385	\$157.7	\$74 \$29,896	114	Asset management	Gary Bartlett CEO/head, fixed income

The List

LIST FACTS

NA=Not available
WND=Would not disclose
Ties listed alphabetically
Footnote:*In millions.

Source: Listed companies.

Information on this list was supplied by individual companies through questionnaires and could not be independently verified by the Philadelphia Business Journal. Merrill Lynch of Wayne declined to participate. Only those that responded to our inquiries were listed. If you wish to be surveyed when this list is next updated, or if you wish to be considered for other Lists, please visit www.biz-journals.com/philadelphia/bol_survey/ to complete a nomination form for your company.

Researched by: Sharon Oliver



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