

top 300 registered investment advisers in the US listed by state

Company	City	Client segments served			
		Retail (<\$1 million)	High Net Worth (\$1 million - \$10 million)	Ultra-High Net Worth (\$10 million +)	Institutional
Clifford Swan Investment Counselors	Pasadena		✓	✓	✓
CoastEdge Partners, LLC	La Jolla		✓	✓	
Corient Capital Partners	Newport Beach		✓	✓	✓
Cornerstone Capital, Inc.	Palo Alto		✓	✓	✓
Destination Wealth Management	Walnut Creek	✓	✓	✓	✓
Dowling & Yahnke, LLC	San Diego		✓	✓	✓
Efficient Market Advisors	La Jolla	✓	✓	✓	✓
Ensemble Capital Management	Burlingame	✓	✓	✓	✓
EP Wealth Advisors	Torrance	✓	✓	✓	✓
Financial Engines	Sunnyvale	✓	✓		✓
First Republic Investment Management	San Francisco	✓	✓	✓	✓
Gurtin Municipal Bond Management	Solana Beach		✓	✓	
HighTower San Diego	San Diego	✓	✓	✓	
HoyleCohen LLC	San Dlego	✓	✓	✓	✓
Index Fund Advisors, Inc.	Irvine	✓	✓	✓	✓
Kayne Anderson Rudnick Investment Management, LLC	Los Angeles	✓	✓	✓	✓
L&S Advisors, Inc.	Los Angeles	✓	✓	✓	✓
Lido Advisors LLC	Los Angeles	✓	✓	✓	✓
Litman Gregory Asset Management	Larkspur	✓	✓	✓	✓
Loring Ward	San Jose	✓	✓	✓	✓
LourdMurray	Beverly Hills	✓	✓	✓	
Main Street Research LLC	Sausalito	✓	✓	✓	✓
Parallel Advisors LLC	San Francisco	✓	✓	✓	✓
Personal Capital	San Francisco	✓	✓	✓	
Pillar Pacific Capital Management	Pacifica	✓	✓	✓	✓
PlanMember Financial Corporation	Carpinteria	✓	✓		✓
Polaris Greystone Financial Group, LLC	San Rafael	✓	✓	✓	✓
Pure Financial Advisors, Inc.	San Diego	✓	✓		
Rand & Associates	San Francisco	✓	✓	✓	✓
Raub Brock Capital Management	Larkspur	✓	✓	✓	✓
Reilly Financial Advisors	La Mesa	✓	✓	✓	✓
Sand Hill Global Advisors, LLC	Palo Alto		✓	✓	✓
Sierra Investment Management, Inc.	Santa Monica	✓	✓	✓	✓
Signature Estate & Investment Advisors, LLC	Los Angeles	✓	✓	✓	✓
Steel Peak Wealth Management, LLC	Woodland Hills	✓	✓	✓	
The Bahnsen Group at HighTower	Newport Beach	✓	✓	✓	✓
United Capital Financial Advisers, LLC	Newport Beach	✓	✓	✓	✓
WealthSource Partners	Arroyo Grande	✓	✓	✓	✓
Weatherly Asset Management	Del Mar		✓	✓	✓
West Coast Financial, LLC	Santa Barbara	✓	✓	✓	✓
Wetherby Asset Management	San Francisco		✓	✓	
Willow Creek Wealth Management	Sebastopol		✓	✓	✓
COLORADO					
Carnick & Kubik Group, LLC	Denver	✓	✓	✓	
Colorado Financial Management	Boulder	✓	✓	✓	✓
The Institute for Wealth Management	Denver	✓	✓		✓
CONNECTICUT					
Belpointe Asset Management LLC	Greenwich	✓	✓	✓	✓
Coastal Bridge Advisors	Westport		✓	✓	
Greenwich Investment Management, Inc.	Stamford	✓	✓	✓	✓
MJP Wealth Advisors	Farmington	✓	✓	✓	
RDM Financial Group at HighTower	Westport		✓	✓	
DELAWARE					
Affinity Wealth Management LLC	Wilmington	✓	✓	✓	✓
DISTRICT OF COLUMBIA					
Alexandria Capital LLC	Washington	✓	✓	✓	✓
FLORIDA					
BigSur Partners	Miami			✓	
Day Hagan Asset Management	Sarasota	✓	✓	✓	✓
Dimension Capital Management	Miami		✓	✓	✓
GenTrust, LLC	Miami		✓	✓	✓
Heritage Investment Group, Inc.	Pompano Beach	✓	✓	✓	✓

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Investacorp Advisory Services, Inc.	Miami	✓	✓	✓	✓
Resource Consulting Group	Orlando		✓	✓	✓
Ruggie Wealth Management	Tavares	✓	✓	✓	✓
Steinberg Global Asset Management, Ltd.	Boca Raton	✓	✓	✓	✓
Valor Advisors LLC	Miami			✓	
WaterOak Advisors	Winter Park	✓	✓	✓	✓
WE Family Offices	Miami			✓	
GEORGIA					
Asset Preservation Advisors	Atlanta	✓	✓	✓	✓
Berman Capital Advisors, LLC	Atlanta		✓	✓	✓
BIP Wealth, LLC	Atlanta	✓	✓	✓	✓
Brightworth	Atlanta	✓	✓	✓	✓
Cahaba Wealth Management	Atlanta	✓	✓	✓	✓
Capital Directions	Atlanta	✓	✓	✓	✓
Capital Investment Advisors	Atlanta	✓	✓		
Cedar Rowe Partners	Atlanta	✓	✓	✓	
CIBC Atlantic Trust Private Wealth Management	Atlanta	✓	✓	✓	✓
CornerCap Investment Counsel	Atlanta		✓	✓	✓
Homrich Berg	Atlanta	✓	✓	✓	✓
JOYN	Atlanta		✓	✓	
Merit Financial Advisors	Alpharetta	✓	✓	✓	
Rollins Financial, Inc.	Atlanta	✓	✓	✓	✓
Stewardship Financial Advisors	Stockbridge	✓	✓	✓	
TrueWealth, LLC	Atlanta	✓	✓	✓	
ILLINOIS					
Altair Advisers LLC	Chicago		✓	✓	
Balasa Dinverno Foltz LLC	Itasca		✓	✓	✓
Brownson, Rehms & Foxworth	Chicago		✓	✓	✓
Capstone Financial Advisors	Downers Grove	✓	✓	✓	✓
Chicago Partners Wealth Advisors	Chicago	✓	✓	✓	✓
Crescent Grove Advisors	Lake Forest		✓	✓	✓
Dearborn Partners, LLC	Chicago	✓	✓	✓	✓
EMBREE FINANCIAL Group	Chicago	✓	✓	✓	✓
Forum Financial Management, LP	Lombard	✓	✓	✓	✓
HighPoint Advisor Group, LLC	Downers Grove	✓	✓	✓	✓
IHT Wealth Management	Chicago	✓	✓	✓	
IPI Wealth Management, Inc.	Decatur	✓	✓	✓	✓
JMG Financial Group, Ltd.	Downers Grove		✓	✓	
Private Vista LLC	Chicago	✓	✓	✓	✓
RMB Capital	Chicago	✓	✓	✓	✓
Savant Capital, LLC	Rockford	✓	✓	✓	✓
Segall Bryant & Hamill	Chicago	✓	✓	✓	✓
Strategic Wealth Partners	Deerfield	✓	✓	✓	✓
The Lerner Group at HighTower	Deerfield	✓	✓	✓	✓
The Mather Group	Chicago		✓	✓	
Vivaldi Capital Management	Chicago	✓	✓	✓	✓
INDIANA					
Bedel Financial Consulting	Indianapolis	✓	✓	✓	
Donaldson Capital Management, LLC	Evansville	✓	✓	✓	✓
Lakeside Wealth Management	Chesterton	✓	✓	✓	✓
The Windsor Group, Ltd.	Indianapolis	✓	✓	✓	✓
Valeo Financial Advisors, LLC	Indianapolis	✓	✓	✓	✓
IOWA					
Foster Group	West Des Moines	✓	✓	✓	✓
KANSAS					
Creative Planning, Inc.	Leawood	✓	✓	✓	✓
Financial Advisory Service, Inc.	Leawood	✓	✓	✓	✓
Mariner Wealth Advisors	Overland Park	✓	✓	✓	✓
KENTUCKY					
ARGI Investment Services	Louisville	✓	✓	✓	✓
Stegner Investment Associates, Inc.	Louisville		✓	✓	✓