

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
LOUISIANA					
Goss Advisors	New Orleans	✓	✓	✓	✓
Resource Management, LLC	Metairie		✓	✓	
Stokes & Hubbell Capital Management, LLC	New Orleans	✓	✓	✓	✓
MARYLAND					
Baltimore-Washington Financial Advisors	Columbia	✓	✓	✓	✓
Bronfman Rothschild	Rockville	✓	✓	✓	✓
Heritage Investors Management Corp.	Bethesda	✓	✓	✓	✓
Horan Capital Management	Hunt Valley	✓	✓	✓	✓
Pinnacle Advisory Group	Columbia		✓		
Planning Solutions Group, LLC	Fulton	✓	✓	✓	✓
StratWealth	Columbia	✓	✓		✓
WBH Advisory, Inc.	Baltimore	✓	✓	✓	✓
WMS Partners, LLC	Towson		✓	✓	
MASSACHUSETTS					
Adviser Investments	Newton	✓	✓	✓	✓
Bainco International Investors, LLC	Boston		✓	✓	
Beaumont Financial Partners, LLC	Needham		✓	✓	✓
Choate Investment Advisors LLC	Boston		✓	✓	✓
Congress Wealth Management, LLC	Boston	✓	✓	✓	✓
Crestwood Advisors	Boston	✓	✓	✓	
Grimes & Company, Inc.	Westborough	✓	✓	✓	✓
Heritage Financial Services, LLC	Westwood		✓	✓	
Lexington Wealth Management	Lexington	✓	✓	✓	✓
New England Private Wealth Advisors, LLC	Wellesley		✓	✓	✓
Proficio Capital Partners LLC	Newton			✓	
SCS Financial	Boston			✓	✓
St. Germain Investment Management	Springfield	✓	✓	✓	✓
The Colony Group	Boston	✓	✓	✓	✓
TwinFocus Capital Partners	Boston			✓	✓
MICHIGAN					
Advance Capital Management	Southfield	✓	✓	✓	✓
Blue Chip Partners, Inc.	Farmington Hills	✓	✓	✓	✓
Center for Financial Planning, Inc.	Southfield	✓	✓	✓	✓
FormulaFolio Investments	Grand Rapids	✓	✓		
Provident Investment Management, Inc.	Novi	✓	✓	✓	✓
Retirement Wealth	Grand Rapids	✓	✓		
Vintage Financial Services, LLC	Ann Arbor	✓	✓	✓	
MINNESOTA					
Accredited Investors Wealth Management	Edina	✓	✓	✓	✓
AdvisorNet Financial	Minneapolis	✓	✓	✓	
Carlson Capital Management	Northfield	✓	✓	✓	✓
CliftonLarsonAllen Wealth Advisors, LLC	Minneapolis	✓	✓	✓	✓
EFS Advisors	Cambridge	✓	✓		
Gradient Investments, LLC	Arden Hills	✓	✓	✓	
JNBA Financial Advisors	Minneapolis	✓	✓	✓	✓
Minneapolis Portfolio Management Group LLC	Minneapolis	✓	✓	✓	✓
SilverOak Wealth Management LLC	Edina	✓	✓	✓	
Vector Wealth Management	Minneapolis	✓	✓	✓	✓
MISSISSIPPI					
Medley & Brown, LLC	Ridgeland	✓	✓	✓	✓
MISSOURI					
Buckingham Strategic Wealth	St. Louis	✓	✓	✓	✓
Frontier Wealth Management, LLC	Kansas City	✓	✓	✓	
Krilogy	St. Louis	✓	✓	✓	✓
Moneta Group	Clayton	✓	✓	✓	✓
Mosaic Family Wealth, LLC	St. Louis		✓	✓	✓
Plancorp	St. Louis	✓	✓	✓	✓
MONTANA					
Bitterroot Capital Advisors, LLC	Bozeman			✓	

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NEBRASKA					
Bridges Investment Management, Inc.	Omaha	✓	✓	✓	✓
Carson Wealth Management Group	Omaha	✓	✓	✓	
NEW HAMPSHIRE					
Vigilant Capital Management	Portsmouth	✓	✓	✓	✓
NEW JERSEY					
Advisors Capital Management, LLC	Ridgewood	✓	✓	✓	✓
CFS Investment Advisory Services, L.L.C.	Totowa	✓	✓	✓	✓
Circle Wealth Management	Summit		✓	✓	
Delta Financial Group, Inc.	Basking Ridge	✓	✓		
Massey Quick Simon	Morristown	✓	✓	✓	✓
Meyer Capital Group	Marlton	✓	✓	✓	✓
Modera Wealth Management, LLC	Westwood	✓	✓	✓	✓
Private Advisor Group, LLC	Morristown	✓	✓	✓	✓
RegentAtlantic	Morristown	✓	✓	✓	✓
Sax Wealth Advisors, LLC	Clifton	✓	✓	✓	✓
Withum Wealth Management	Red Bank	✓	✓	✓	✓
NEW MEXICO					
REDW Stanley Financial Advisors, LLC	Albuquerque	✓	✓	✓	✓
NEW YORK					
AJ Wealth	New York		✓	✓	
Alesco Advisors LLC	Pittsford		✓	✓	✓
AlphaCentric Advisors LLC	Huntington	✓	✓	✓	✓
Betterment	New York	✓	✓	✓	✓
Courier Capital, LLC	Buffalo	✓	✓	✓	✓
Douglas C. Lane & Associates	New York	✓	✓	✓	✓
HPM Partners LLC	New York		✓	✓	✓
Ingalls & Snyder LLC	New York	✓	✓	✓	✓
Joel Isaacson & Co., LLC	New York	✓	✓	✓	
Klingenstein Fields Wealth Advisors	New York	✓	✓	✓	
Ritholtz Wealth Management	New York	✓	✓	✓	✓
Sandhill Investment Management	Buffalo	✓	✓	✓	✓
Snowden Lane Partners	New York		✓	✓	✓
Strategic Financial Services, Inc.	Utica	✓	✓	✓	✓
Summit Trail Advisors	New York		✓	✓	✓
Tiedemann Advisors, LLC	New York			✓	✓
Wealthstream Advisors, Inc.	New York	✓	✓	✓	✓
NORTH CAROLINA					
Cardinal Capital Management, Inc.	Raleigh	✓	✓	✓	✓
Carroll Financial Associates, Inc.	Charlotte	✓	✓	✓	✓
Cornerstone Wealth	Huntersville	✓	✓	✓	✓
Novare Capital Management	Charlotte	✓	✓	✓	
Parsec Financial Management	Asheville	✓	✓	✓	✓
Stearns Financial Group	Chapel Hill		✓	✓	✓
Triad Financial Advisors, Inc. (TFA)	Greensboro	✓	✓	✓	
Willingdon Wealth Management	Huntersville	✓	✓	✓	✓
Woodward Financial Advisors, Inc.	Chapel Hill	✓	✓	✓	✓
OHIO					
Aurum Wealth Management	Mayfield Village	✓	✓	✓	✓
Bartlett Wealth Management	Cincinnati	✓	✓	✓	✓
Budros, Ruhlin & Roe, Inc.	Columbus	✓	✓	✓	✓
Carnegie Investment Counsel	Pepper Pike	✓	✓	✓	✓
Fairport Asset Management	Cleveland		✓	✓	
Hamilton Capital Management, Inc.	Columbus	✓	✓	✓	✓
Johnson Investment Counsel	Cincinnati	✓	✓	✓	✓
MAI Capital Management, LLC	Cleveland	✓	✓	✓	✓
Mariner Wealth Advisors - Cincinnati	Cincinnati	✓	✓	✓	✓
Prosperity Capital Advisors	Westlake	✓	✓		✓
SJS Investment Services	Sylvania	✓	✓	✓	✓
Summit Financial Strategies, Inc.	Columbus	✓	✓	✓	✓
Truepoint Wealth Counsel	Cincinnati		✓	✓	✓