The top 300 registered investment advisers in the US listed by state

		Client segments served			
Company	City	Retail (<$1 million)	High Net Worth ($1 million - $10 million)	Ultra-High Net Worth ($10 million +)	Institutional
ALABAMA					
Bridgeworth, LLC	Birmingham	✓	✓	✓	
HighTower Twickenham	Huntsville		✓	✓	✓
Keel Point, LLC	Huntsville	✓	✓	✓	✓
Porter White & Company	Birmingham		✓	✓	✓
Warren Averett Asset Management, LLC	Birmingham	✓	✓	✓	✓
ARIZONA					
MRA Associates	Phoenix	✓	✓	✓	✓
TCI Wealth Advisors, Inc.	Tucson	✓	✓	✓	✓
TFO Phoenix, Inc.	Phoenix	✓	✓	✓	✓
Versant Capital Management, Inc.	Phoenix		✓	✓	
CALIFORNIA					
AdvicePeriod	Los Angeles	✓	✓	✓	✓
Apriem Advisors	Irvine	✓	✓	✓	
Aspiriant	Los Angeles		✓	✓	
B|O|S	San Francisco		✓	✓	✓
Bailard, Inc.	Foster City	✓	✓	✓	✓
Burton Enright Welch	Walnut Creek	✓	✓	✓	✓
Cambria Investment Management, LP	El Segundo	✓	✓	✓	✓
Cardiff Park Advisors	San Marcos	✓	✓	✓	✓
Check Capital Management Inc.	Costa Mesa	✓	✓	✓	✓
Churchill Management Group	Los Angeles	✓	✓	✓	✓

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 DIego	✓	✓	✓	✓
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	✓	✓	✓	✓
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, Rehmus & 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		✓	✓	✓
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			✓	
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		✓	✓	✓
OKLAHOMA					
Exencial Wealth Advisors	Oklahoma City	✓	✓	✓	✓
Tom Johnson Investment Management, LLC	Oklahoma City	✓	✓	✓	✓
OREGON					
Ferguson Wellman Capital Management	Portland	✓	✓	✓	✓
McGee Wealth Management, Inc.	Portland	✓	✓	✓	✓
TRUE Private Wealth Advisors	Salem	✓	✓	✓	✓
PENNSYLVANIA					
Alpha Architect	Broomall	✓	✓	✓	✓
BLB&B Advisors, LLC	Ambler	✓	✓	✓	✓
CooksonPeirce Wealth Management	Pittsburgh	✓	✓	✓	✓
Fort Pitt Capital Group, LLC	Pittsburgh	✓	✓	✓	✓
HBKS Wealth Advisors	Erie	✓	✓	✓	✓
Hoover Financial Advisors	Malvern	✓	✓	✓	
Ironview Capital Management LLC	King of Prussia	✓	✓	✓	✓
JFS Wealth Advisors	Hermitage	✓	✓	✓	✓
Mill Creek Capital Advisors, LLC	Conshohocken	✓	✓	✓	✓
myCIO Wealth Partners, LLC	Philadelphia			✓	✓
Northeast Financial Group, Inc.	Tannersville	✓	✓	✓	✓
Radnor Financial Advisors, LLC	Wayne	✓	✓	✓	
RTD Financial	Philadelphia		✓	✓	✓
The Good Life Companies	Reading	✓	✓		
Veritable, LP	Newtown Square		✓	✓	✓
Waldron Private Wealth	Bridgeville		✓	✓	✓
RHODE ISLAND					
Capital Wealth Management	West Warwick	✓	✓	✓	✓
TENNESSEE					
Rather & Kittrell	Knoxville	✓	✓	✓	✓

TrustCore, LLC	Brentwood	✓	✓	✓	✓
TEXAS					
360 Wealth Management	Dallas	✓	✓	✓	
Avalon Advisors, LLC	Houston		✓	✓	✓
Financial Synergies Wealth Advisors, Inc.	Houston	✓	✓	✓	✓
Frontier Investment Management Company	Dallas	✓	✓	✓	✓
Legacy Asset Management, Inc.	Houston	✓	✓		✓
Level Four Advisory Services, LLC	Plano	✓	✓	✓	✓
Money Matters with Ken Moraif	Plano	✓	✓		✓
Pin Oak Investment Advisors, Inc.	Houston		✓	✓	
RAA	Addison	✓	✓		
Sather Financial Group, Inc.	Victoria	✓	✓	✓	✓
Smith Anglin Financial, LLC	Dallas	✓	✓	✓	✓
Syntal Capital Partners, LLC	Midland	✓	✓	✓	
Venturi Wealth Management, LLC	Austin		✓	✓	✓
UTAH					
The Insight Group	Salt Lake City	✓	✓		✓
VIRGINIA					
Acorn Financial Advisory Services, Inc.	Reston	✓	✓	✓	
Bogart Wealth	McLean	✓	✓	✓	
Burney Company	Reston	✓	✓	✓	✓
Cary Street Partners Investment Advisory LLC	Richmond	✓	✓	✓	✓
Cassaday & Company, Inc.	McLean	✓	✓	✓	
CJM Wealth Advisers, Ltd.	Fairfax	✓	✓	✓	✓
Edelman Financial Services, LLC	Fairfax	✓	✓	✓	✓
Mason Investment Advisory Services, Inc.	Reston	✓	✓	✓	✓
Signature Family Wealth Advisors	Norfolk		✓	✓	✓
Sullivan, Bruyette, Speros & Blayney, LLC	McLean		✓	✓	✓
The Capital Management Corporation	Glen Allen	✓	✓	✓	✓
WASHINGTON					
Brighton Jones	Seattle	✓	✓	✓	✓
Coldstream Wealth Management	Bellevue	✓	✓	✓	✓
Empirical Wealth Management	Seattle	✓	✓	✓	✓
Evergreen Gavekal	Bellevue	✓	✓	✓	✓
Fisher Investments	Camas	✓	✓	✓	✓
Garde Capital	Seattle		✓	✓	✓
Merriman Wealth Management	Seattle	✓	✓	✓	
Petersen Hastings Investment Management	Kennewick	✓	✓	✓	✓
WISCONSIN					
Advisors' Pride, Inc.	Appleton	✓	✓	✓	✓
Annex Wealth Management, LLC	Elm Grove	✓	✓	✓	✓
Cleary Gull Advisors, a Johnson Financial Group Company	Milwaukee	✓	✓	✓	✓
Heck Capital Advisors	Rhinelander	✓	✓	✓	✓
Sadoff Investment Management	Milwaukee	✓	✓	✓	✓
SVA Plumb Wealth Management, LLC	Madison	✓	✓	✓	✓