

Listing Our snapshot of the best Registered Investment Advisers in the US

FT 300

The FT300 top registered investment advisers in the US listed alphabetically by state

Firm name	City	Client Segments Served			
		Retail (individuals with less than \$1 million)	HNW (individuals with \$1 million - \$10 million)	Ultra HNW (individuals with \$10 million+)	Institutional
ALABAMA					
HighTower Twickenham	Huntsville	✓	✓	✓	✓
Keel Point, LLC	Huntsville	✓	✓	✓	✓
The Welch Group, LLC	Birmingham	✓	✓	✓	✓
Warren Averett Asset Management, LLC	Birmingham		✓	✓	✓
ARIZONA					
Alpha Fiduciary	Phoenix	✓	✓	✓	✓
Galvin, Gaustad & Stein, LLC	Scottsdale	✓	✓	✓	
Miller Russell Associates	Phoenix	✓	✓	✓	✓
TCI Wealth Advisors, Inc	Tucson	✓	✓	✓	✓
United Planners Financial Services	Scottsdale	✓	✓		✓
ARKANSAS					
Lathrop Investment Management Corp	Little Rock		✓	✓	✓

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CALIFORNIA					
AMI Asset Management	Los Angeles	✓	✓	✓	✓
Atherton Lane Advisers, LLC	Menlo Park	✓	✓	✓	
Baker Street Advisors, LLC	San Francisco		✓	✓	
Beacon Pointe Advisors	Newport Beach	✓	✓	✓	✓
Blankinship & Foster, LLC	Solana Beach		✓	✓	
Boltwood Capital Management	Walnut Creek	✓	✓	✓	✓
California Financial Advisors	San Ramon	✓	✓	✓	
Callan Capital	La Jolla		✓	✓	
Camden Capital	Los Angeles	✓	✓	✓	✓
Cardiff Park Advisors	Carlsbad	✓	✓	✓	✓
Checchi Capital Advisers, LLC	Beverly Hills	✓	✓	✓	✓
Clifford Swan Investment Counsel	Pasadena		✓	✓	✓
Covington Capital Management	Los Angeles	✓	✓	✓	✓

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Dan Goldie Financial Services, LLC	Palo Alto	✓	✓	✓	✓
Dixon Financial Services, Inc	Lafayette	✓	✓	✓	✓
Dowling & Yahnke, LLC	San Diego		✓	✓	✓
Efficient Market Advisors	San Diego	✓	✓	✓	✓
First Foundation	Irvine		✓	✓	✓
First Republic Investment Management, Inc	San Francisco	✓	✓	✓	✓
Gamble Jones Investment Counsel	Pasadena	✓	✓	✓	✓
Gemmer Asset Management, LLC	Walnut Creek	✓	✓	✓	✓
Genovese Burford & Brothers	Sacramento	✓	✓	✓	✓
Golub Group	San Mateo		✓	✓	
Halbert Hargrove Global Advisors	Long Beach		✓	✓	✓
Hanson McClain Advisors	Sacramento	✓	✓	✓	✓
HighTower Advisors	Menlo Park		✓	✓	
HoyleCohen, LLC	San Diego	✓	✓	✓	✓
KCM Investment Advisors, LLC	San Rafael	✓	✓	✓	✓
Mission Wealth Management, LLC	Santa Barbara	✓	✓	✓	✓
Morton Capital Management	Calabasas	✓	✓	✓	✓
Nelson Roberts Investment Advisors	East Palo Alto		✓	✓	✓
Osborne Partners Capital Management, LLC	San Francisco		✓	✓	✓
Parallel Advisors	San Francisco	✓	✓	✓	✓
Personal Capital	Redwood City	✓	✓		
Pillar Pacific Capital Management, LLC	Pacifica	✓	✓	✓	✓
Polaris Wealth Advisers, LLC	San Rafael	✓	✓	✓	✓
Private Ocean	San Rafael	✓	✓	✓	✓
Pure Financial Advisors, Inc	San Diego	✓	✓	✓	
Raub Brock Capital Management	Larkspur	✓	✓	✓	✓
RS Crum Inc	Newport Beach	✓	✓		
Sand Hill Global Advisors	Palo Alto		✓	✓	✓
Saratoga Research & Investment Management	Saratoga	✓	✓	✓	✓
Savant Investment Group	San Francisco	✓	✓	✓	✓
Scharf Investments, LLC	Scotts Valley	✓	✓	✓	✓
Schnieders Capital Management, LLC	Pasadena	✓	✓	✓	✓
Sitrin Capital Portfolio Management	Century City	✓	✓		✓
The Advisory Group of San Francisco, LLC	San Francisco	✓	✓	✓	✓
The Presidio Group	San Francisco		✓	✓	✓
United Capital Financial Advisers, LLC	Newport Beach	✓	✓	✓	✓
Van Hulzen Asset Management, LLC	El Dorado Hills	✓	✓	✓	✓
Violich Capital Management	San Francisco	✓	✓	✓	✓
Willow Creek Wealth Management, Inc	Sebastopol	✓	✓	✓	✓
Yeske Buie	San Francisco	✓	✓	✓	
COLORADO					
BRC Investment Management, LLC	Greenwood Village	✓	✓		✓
Janiczek Wealth Management	Greenwood Village		✓	✓	
Wagner Wealth Management	Denver	✓	✓	✓	✓
CONNECTICUT					
Bradley, Foster & Sargent, Inc	Hartford	✓	✓	✓	✓
Connecticut Wealth Management, LLC	Farmington		✓	✓	✓
LLBH Private Wealth Management, LLC	Westport	✓	✓	✓	✓
NorthCoast Asset Management	Greenwich	✓	✓	✓	✓
Relyea Zuckerberg Hanson, LLC	Stamford		✓	✓	
DISTRICT OF COLUMBIA					
Avenir Corporation	Washington		✓	✓	✓
Farr, Miller & Washington, LLC	Washington	✓	✓	✓	✓
FLORIDA					
ARS Wealth Advisors	St. Petersburg	✓	✓	✓	
Bott-Anderson Partners, Inc	Jacksonville		✓	✓	✓
CPS Investment Advisors	Lakeland	✓	✓		✓
Cumberland Advisors	Sarasota	✓	✓	✓	✓
CV Advisors, LLC	Aventura			✓	✓
Evensky & Katz / Foldes Financial Wealth Management	Coral Gables	✓	✓	✓	✓
Finser International Corporation, Inc	Miami	✓	✓	✓	

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GenTrust Wealth Management	Miami		✓	✓	✓
Global Financial Private Capital, LLC	Sarasota	✓	✓	✓	✓
Heritage Investment Group, Inc	Pompano Beach	✓	✓	✓	✓
ProVise Management Group, LLC	Clearwater	✓	✓	✓	✓
Resource Consulting Group	Orlando	✓	✓	✓	✓
	Coral Gables	✓	✓	✓	✓
WaterOak Advisors	Winter Park	✓	✓	✓	✓
WE Family Offices	Miami			✓	
GEORGIA					
A. Montag & Associates	Atlanta		✓	✓	✓
Atlanta Capital Group	Atlanta	✓	✓	✓	✓
Atlantic Trust	Atlanta		✓	✓	✓
Balentine	Atlanta		✓	✓	✓
Berman Capital Advisors, LLC	Atlanta		✓	✓	✓
Brightworth	Atlanta	✓	✓	✓	✓
Capital Directions, LLC	Atlanta	✓	✓	✓	✓
Capital Investment Advisors	Atlanta	✓	✓		
Homrich Berg	Atlanta	✓	✓	✓	✓
SignatureFD, LLC	Atlanta	✓	✓	✓	
Smith & Howard Wealth Management	Atlanta	✓	✓	✓	✓
Southeast Asset Advisors, Inc	Thomasville		✓	✓	✓
Willis Investment Counsel	Gainesville		✓	✓	✓
HAWAII					
CKW Financial Group	Honolulu	✓	✓	✓	✓
ILLINOIS					
Altair Advisers, LLC	Chicago		✓	✓	
Balasa Dinverno Foltz, LLC	Itasca		✓	✓	✓
Brookstone Capital Management	Wheaton	✓	✓		
Brownson, Rehms & Foxworth	Chicago		✓	✓	✓
Cedar Hill Associates, LLC	Chicago		✓	✓	✓
Chicago Partners Wealth Advisors	Chicago	✓	✓	✓	✓
Cozad Asset Management, Inc	Champaign	✓	✓	✓	✓
HighPoint Advisor Group	Downers Grove	✓	✓	✓	✓
HighTower Advisors - The Lerner Group	Chicago	✓	✓	✓	✓
IPI Wealth Management, Inc	Decatur	✓	✓	✓	✓
JMG Financial Group, Ltd	Oak Brook		✓	✓	
Romano Wealth Management	Evanston	✓	✓	✓	
Savant Capital, LLC	Rockford	✓	✓	✓	✓
Stairway Partners, LLC	Chicago		✓	✓	✓
Strategic Wealth Partners, LLC	Deerfield	✓	✓	✓	✓
Whitnell	Oak Brook		✓	✓	
INDIANA					
Column Capital	Indianapolis	✓	✓	✓	✓
Donaldson Capital Management, LLC	Evansville	✓	✓	✓	✓
Valeo Financial Advisors	Indianapolis	✓	✓	✓	✓
IOWA					
World Trend Financial	Cedar Rapids	✓	✓	✓	
KANSAS					
Creative Planning, Inc	Leawood	✓	✓	✓	✓
Stepp & Rothwell, Inc	Overland Park	✓	✓	✓	
Sunrise Advisors	Leawood	✓	✓	✓	✓
KENTUCKY					
ARGI Investment Services, LLC	Louisville	✓	✓	✓	
MCF Advisors	Covington	✓	✓	✓	✓
Parthenon LLC	Louisville	✓	✓	✓	✓
LOUISIANA					
Resource Management, LLC	Metairie	✓	✓	✓	

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MARYLAND					
Baltimore Washington Financial Advisors	Columbia	✓	✓	✓	✓
FBB Capital Partners	Bethesda	✓	✓	✓	✓
Greenspring Wealth Management	Towson	✓	✓	✓	✓
Heritage Investors Management	Bethesda	✓	✓	✓	✓
Wagner Bowman Management Corp	Baltimore	✓	✓	✓	✓
WMS Partners, LLC	Towson		✓	✓	
MASSACHUSETTS					
Adviser Investments	Newton	✓	✓		
Athena Capital Advisors, LLC	Lincoln			✓	✓
Atlas Private Wealth Management, LLC	North Adams	✓	✓		
Aureus Asset Management	Boston		✓	✓	✓
Ballentine Partners, LLC	Waltham	✓	✓	✓	
Breckinridge Capital Advisors, Inc	Boston	✓	✓	✓	✓
Choate Investment Advisors	Boston		✓	✓	✓
Congress Wealth Management, LLC	Boston	✓	✓	✓	✓
Grimes & Company, Inc	Westborough	✓	✓	✓	
Montis Financial, LLC	Waltham	✓	✓	✓	
North American Management Corp	Boston		✓	✓	✓
SCS Financial	Boston			✓	✓
TFC Financial Management, Inc	Boston	✓	✓	✓	
The Colony Group	Boston	✓	✓	✓	✓
Welch & Forbes LLC	Boston	✓	✓	✓	✓
Wellesley Investment Advisors, Inc	Wellesley	✓	✓	✓	✓
Wilkins Investment Counsel, Inc	Boston		✓	✓	✓
MICHIGAN					
Center for Financial Planning, Inc	Southfield	✓	✓	✓	
Flexible Plan Investments, Ltd	Bloomfield Hills	✓	✓		
LJPR, LLC	Troy	✓	✓	✓	✓
Mainstay Capital Management, LLC	Grand Blanc	✓	✓	✓	✓
Rehmann Financial	Saginaw	✓	✓		✓
Retirement Funding Advisors, Inc	Troy	✓	✓	✓	✓
Retirement Income Solutions, Inc	Ann Arbor	✓	✓	✓	
Zhang Financial	Portage	✓	✓	✓	✓
MINNESOTA					
JNBA Financial Advisors	Minneapolis	✓	✓	✓	✓
SilverOak Wealth Management, LLC	Edina	✓	✓	✓	
Vector Wealth Management	Minneapolis	✓	✓	✓	
MISSISSIPPI					
Medley & Brown, LLC	Ridgeland	✓	✓	✓	✓
MISSOURI					
Buckingham Asset Management	St. Louis	✓	✓	✓	✓
Frontier Wealth Management, LLC	Kansas City	✓	✓	✓	✓
Larson Financial Group, LLC	St. Louis	✓	✓	✓	✓
Matter Family Office	St. Louis		✓	✓	
Moneta Group	Clayton		✓	✓	✓
Plancorp, LLC	St. Louis	✓	✓	✓	✓
RubinBrown Advisors	Clayton	✓	✓	✓	✓
Zemenick & Walker, Inc	St Louis	✓	✓	✓	✓
MONTANA					
Stack Financial Management	Whitefish	✓	✓	✓	✓
NEBRASKA					
Carson Wealth Management Group	Omaha	✓	✓	✓	
NEVADA					
HighTower Las Vegas	Henderson	✓	✓	✓	✓

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NEW JERSEY					
Advisors Capital Management, LLC	Ridgewood	✓	✓		✓
CFS Investment Advisory Services, LLC	Totowa	✓	✓	✓	✓
Circle Wealth Management, LLC	Summit		✓	✓	✓
Condor Capital Management	Martinsville	✓	✓	✓	✓
Lassus Wherley	New Providence	✓	✓	✓	✓
Massey Quick & Co. LLC	Morristown		✓	✓	✓
Meyer Capital Group	Marlton	✓	✓	✓	✓
Modera Wealth Management, LLC	Westwood	✓	✓	✓	✓
Private Advisor Group, LLC	Morristown	✓	✓	✓	✓
RegentAtlantic	Morristown	✓	✓	✓	✓
NEW MEXICO					
REDW Stanley Financial Advisors, LLC	Albuquerque	✓	✓	✓	✓
NEW YORK					
Altfest Personal Wealth Management	New York	✓	✓	✓	
Barrett Asset Management, LLC	New York		✓	✓	
Betterment	New York	✓	✓		
Bruderman Brothers, LLC	Suffern	✓	✓		
Capital Management Group of New York	New York	✓	✓		✓
City National Rochdale	New York	✓	✓	✓	✓
Clear Harbor Asset Management, LLC	New York	✓	✓	✓	✓
Constellation Wealth Advisors, LLC	New York			✓	✓
Courier Capital Corporation	Buffalo	✓	✓	✓	✓
Dynasty Wealth Management, LLC	New York		✓	✓	
Evercore Wealth Management, LLC	New York		✓	✓	✓
Financial Partners Capital Management, LLC	New York		✓	✓	✓
Forbes Family Trust	New York		✓	✓	✓
HPM Partners	New York		✓	✓	✓
HSW Advisors, HighTower	New York		✓	✓	✓
Joel Isaacson & Co.	New York		✓	✓	
Klingman & Associates, LLC	New York	✓	✓	✓	✓
Lebenthal Asset Management, LLC	New York	✓	✓	✓	✓
M. Griffith Investment Services, Inc	New Hartford	✓	✓		
Morse, Towey and White Group	New York	✓	✓	✓	
Offit Capital	New York			✓	✓
Ramius	New York	✓	✓	✓	✓
RCL Advisors, LLC	New York		✓	✓	✓
Silvercrest Asset Management Group	New York City		✓	✓	✓
Snowden Lane Partners	New York	✓	✓	✓	✓
Tiedemann Wealth Management	New York		✓	✓	✓
NORTH CAROLINA					
Carroll Financial Associates, Inc	Charlotte	✓	✓	✓	✓
Delegate Advisors	Chapel Hill			✓	
Novare Capital Management	Charlotte	✓	✓	✓	
Parsec Financial	Asheville	✓	✓	✓	✓
Stearns Financial Group	Greensboro	✓	✓	✓	✓
OHIO					
Bartlett & Co., LLC	Cincinnati	✓	✓	✓	✓
Budros, Ruhlin & Roe, Inc	Columbus	✓	✓	✓	✓
Carnegie Investment Counsel	Pepper Pike	✓	✓	✓	✓
Cincinnati Asset Management, Inc	Cincinnati	✓	✓	✓	✓
Cornerstone Capital Advisors	Uniontown	✓	✓	✓	✓
Fairport Asset Management	Cleveland		✓	✓	
Fairway Wealth Management, LLC	Independence		✓	✓	
Foster & Motley, Inc	Cincinnati	✓	✓	✓	✓
Hamilton Capital Management, Inc	Columbus	✓	✓	✓	✓
Harvest Financial Advisors, LLC	West Chester	✓	✓	✓	
MAI Capital Management, LLC	Cleveland	✓	✓	✓	✓
McDonald Partners, LLC	Cleveland	✓	✓	✓	✓
OBS Financial Services, Inc	Whitehouse	✓	✓	✓	✓
RiverPoint Capital Management	Cincinnati	✓	✓	✓	✓

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St. Clair Advisors	Mayfield Heights		✓	✓		Oxbow Advisors, LLC	Austin		✓	✓	
Summit Financial Strategies	Columbus	✓	✓			Portfolio Advisory Council, LLC	Houston	✓	✓	✓	✓
Truepoint Wealth Counsel	Cincinnati	✓	✓	✓	✓	Segment Wealth Management, LLC	Houston	✓	✓	✓	✓
						SFMG Wealth Advisors	Plano	✓	✓	✓	
OKLAHOMA						South Texas Money Management, Ltd	San Antonio	✓	✓	✓	✓
Adams Hall Wealth Advisors	Tulsa	✓	✓	✓	✓	Stratford Consulting, LLC	Addison		✓	✓	
Retirement Investment Advisors, Inc	Oklahoma City	✓	✓	✓	✓	Tolleson Wealth Management	Dallas			✓	
Tom Johnson Investment Management, LLC	Oklahoma City	✓	✓	✓	✓	True North Advisors, LLC	Dallas	✓	✓	✓	✓
OREGON						UTAH					
AKT Wealth Advisors LP	Lake Oswego	✓	✓	✓	✓	Soltis Investment Advisors, LLC	St George	✓	✓	✓	✓
Sloy, Dahl & Holst, Inc	Portland	✓	✓	✓	✓						
TRUE Private Wealth Advisors	Salem	✓	✓	✓	✓	VERMONT					
						Manchester Capital Management, LLC	Manchester		✓	✓	✓
PENNSYLVANIA											
Bergin, Roberts & Co. LLC	Blue Bell	✓	✓	✓	✓	VIRGINIA					
Clark Capital Management Group, Inc	Philadelphia	✓	✓	✓	✓	Burney Company	Falls Church	✓	✓	✓	✓
CooksonPeirce Wealth Management	Pittsburgh	✓	✓	✓	✓	Cassaday & Company, Inc	McLean	✓	✓	✓	
Cornerstone Advisors Asset Management, Inc	Bethlehem	✓	✓	✓	✓	Davenport Asset Management	Richmond	✓	✓		✓
HBKS Wealth Advisors	Erie	✓	✓	✓		Davidson & Garrard, Inc	Lynchburg	✓	✓	✓	✓
HJ Wealth Management, LLC	Plymouth Meeting	✓	✓	✓	✓	Edelman Financial Services, LLC	Fairfax	✓	✓		
Hunter Associates	Pittsburgh	✓	✓	✓	✓	Glassman Wealth Services	Tysons	✓	✓	✓	✓
Mill Creek Capital Advisors, LLC	Conshohocken		✓	✓	✓	HighTower VWG Wealth Management	Vienna		✓	✓	✓
Permit Capital Advisors, LLC	West Conshohocken		✓	✓	✓	JoycePayne Partners	Richmond	✓	✓	✓	✓
RTD Financial Advisors, Inc	Philadelphia	✓	✓	✓	✓	Lara, May & Associates, LLC	Falls Church	✓	✓		✓
Sage Financial Group	West Conshohocken	✓	✓	✓		Mason Investment Advisory Services, Inc	Reston	✓	✓	✓	✓
Wescott Financial Advisory Group, LLC	Philadelphia	✓	✓	✓	✓	Pagnato Karp, HighTower	Reston		✓	✓	✓
						Partners in Financial Planning, LLC	Salem	✓	✓	✓	✓
RHODE ISLAND						Sullivan, Bruyette, Speros & Blayney	McLean		✓	✓	✓
Endurance Wealth Management	Providence	✓	✓		✓	Verus Financial Partners	Richmond	✓	✓		✓
						Wilbanks, Smith & Thomas Asset Management, LLC	Norfolk	✓	✓	✓	✓
TENNESSEE											
Highland Capital Management, LLC	Memphis	✓	✓	✓	✓	WASHINGTON					
Patriot Investment Management Group, Inc	Knoxville	✓	✓	✓	✓	Brighton Jones	Seattle	✓	✓	✓	✓
TD Capital Management, LLC	Memphis	✓	✓	✓	✓	Bristlecone Advisors	Seattle		✓	✓	✓
TrustCore Financial Services, Inc	Brentwood	✓	✓	✓	✓	Fisher Investments	Camas	✓	✓	✓	✓
Waddell & Associates, Inc	Memphis	✓	✓	✓	✓	Greene Wealth Management, LLC	Seattle	✓	✓	✓	✓
						HighTower Bellevue	Bellevue	✓	✓	✓	✓
TEXAS						Laird Norton Wealth Management	Seattle		✓	✓	✓
Beaird Harris	Dallas	✓	✓	✓	✓	Moss Adams Wealth Advisors, LLC	Seattle	✓	✓	✓	✓
Chilton Capital Management, LLC	Houston	✓	✓	✓	✓	Threshold Group, LLC	Seattle		✓	✓	✓
Covenant Multifamily Offices, LLC	San Antonio	✓	✓	✓	✓						
Durbin Bennett Private Wealth Management, LLC	Austin		✓	✓	✓	WISCONSIN					
Financial Synergies Asset Management	Houston	✓	✓	✓	✓	Annex Wealth Management, LLC	Elm Grove	✓	✓	✓	✓
Frost Investment Advisors, LLC	San Antonio		✓	✓	✓	Madison Investment Advisors	Madison	✓	✓	✓	✓
Galapagos Partners, LP	Houston	✓	✓	✓	✓						