



America's Top Financial Advisory Firms 2025

In today's financial landscape, Americans want more than just advice—they want a trusted partner to help them achieve their financial goals. According to a [recent survey](#), over 77 percent of Americans feel uncertain about their financial future, highlighting the growing need for expert guidance.

The companies on America's Top Financial Advisory Firms 2025 are leading the charge, providing clients with the expertise, transparency and personalized attention they're looking for. These firms are not only helping individuals and businesses grow their wealth but empowering them to navigate complex financial decisions with confidence.

Newsweek is partnering with Plant-A Insights Group to highlight Registered Investment Advisers that go beyond the basics, offering innovative financial solutions, a commitment to fiduciary responsibility and a client-first approach.

We analyzed over 15,000 financial advisories registered with the SEC and scored them based on the following factors: asset performance, client performance, adviser expertise and client ratio, breadth of service offerings and conflicts of interest.

Companies like Facet Wealth, Sarofim Trust Co. and Shade Tree Advisors exemplify what it means to be a financial leader in today's market. When clients feel supported and informed,

We hope this ranking helps guide you toward a brighter financial future for you and your family.



Nancy Cooper
Global Editor in Chief

NEWSWEEK

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AUM = Assets Under Management / CAGR = Compound Annual Growth Rate

 

★★★★★	Facet Wealth	\$1 Billion - \$5 Billion	more than 100%	Baltimore	Maryland
★★★★★	Sarofim Trust Co.	\$5 Billion - \$10 Billion	60%-70%	Houston	Texas
★★★★★	Apollon Wealth Management	\$5 Billion - \$10 Billion	80%-90%	Mount Pleasant	South Carolina
★★★★★	The Cynosure Group	\$1 Billion - \$5 Billion	30%-40%	Salt Lake City	Utah

★★★★★	Shade Tree Advisors	\$500 Million - \$1 Billion	90%-100%	Saratoga Springs	New York
★★★★★	Cresset Asset Management	over \$10 Billion	60%-70%	Chicago	Illinois
★★★★★	BCP Advisors	up to \$100 Million	90%-100%	Miami	Florida
★★★★★	Econologics Financial Advisors	up to \$100 Million	more than 100%	Largo	Florida
★★★★★	Shuster Advisory Group	\$5 Billion - \$10 Billion	more than 100%	Honolulu	Hawaii
★★★★★	RMR Wealth Builders	\$1 Billion - \$5 Billion	60%-70%	Montclair	New Jersey
★★★★★	XP Advisory US	\$1 Billion - \$5 Billion	60%-70%	Miami	Florida
★★★★★	Geowealth Management	over \$10 Billion	60%-70%	Chicago	Illinois
★★★★★	Sage Mountain Advisors	\$1 Billion - \$5 Billion	80%-90%	Atlanta	Georgia
★★★★★	Advisory Alpha	\$1 Billion -	30%-40%	Holland	Michigan

		\$5 Billion			
★★★★★	Newday Funds	up to \$100 Million	more than 100%	Tiburon	California
★★★★★	Innovia Wealth	\$1 Billion - \$5 Billion	80%-90%	Grand Rapids	Michigan
★★★★★	Axxcess Wealth Management	\$5 Billion - \$10 Billion	50%-60%	Carlsbad	California
★★★★★	Clear Brook Advisors	\$500 Million - \$1 Billion	90%-100%	Boston	Massachusetts
★★★★★	Integrated Wealth Concepts	over \$10 Billion	50%-60%	Waltham	Massachusetts
★★★★★	Oneascent Financial Services	\$1 Billion - \$5 Billion	40%-50%	Birmingham	Alabama
★★★★★	Clearstead Advisors	over \$10 Billion	30%-40%	Cleveland	Ohio
★★★★★	Perennial Investment Advisors	\$1 Billion - \$5 Billion	40%-50%	Los Angeles	California

★★★★★	MMBG Investment Advisors Co.	\$1 Billion - \$5 Billion	30%-40%	Miami	Florida
★★★★★	Waverly Advisors	over \$10 Billion	30%-40%	Birmingham	Alabama
★★★★★	Nest Investments	up to \$100 Million	90%-100%	Conshohocken	Pennsylvania
★★★★★	Prosperity	\$1 Billion - \$5 Billion	30%-40%	Owings Mills	Maryland
★★★★★	Verum Partners	\$500 Million - \$1 Billion	30%-40%	Charlotte	North Carolina
★★★★★	Pathstone Family Office	over \$10 Billion	40%-50%	Englewood	New Jersey
★★★★★	Colter Lewis Investment Partners	\$1 Billion - \$5 Billion	60%-70%	Greenwich	Connecticut
★★★★★	Modera Wealth Management	over \$10 Billion	30%-40%	Westwood	New Jersey
★★★★★	Activest Wealth Management	\$500 Million - \$1 Billion	30%-40%	Aventura	Florida
★★★★★	Highline Wealth	\$250 Million -	30%-40%	Sherman Oaks	California

	Partners	\$500 Million			
★★★★★	CFM Advisors Inc	\$1 Billion - \$5 Billion	70%-80%	Hauppauge	New York
★★★★★	Fortis Capital Management	\$250 Million - \$500 Million	70%-80%	Bellevue	Washington
★★★★★	Coyle Capital	\$500 Million - \$1 Billion	40%-50%	Lakeway	Texas
★★★★★	Martha's Vineyard Investment Advisors	up to \$100 Million	10%-20%	West Tisbury	Massachusetts
★★★★★	Wiss Private Client Advisors	\$500 Million - \$1 Billion	30%-40%	Florham Park	New Jersey
★★★★★	Cannell & Spears	\$5 Billion - \$10 Billion	30%-40%	New York	New York
★★★★★	Robertson Stephens Wealth Management	\$1 Billion - \$5 Billion	50%-60%	San Francisco	California
★★★★★	ARI Group	up to \$100 Million	-	New York	New York

★★★★★	Quartz Partners	\$250 Million - \$500 Million	30%-40%	Saratoga Springs	New York
★★★★★	Alphacore Capital	\$1 Billion - \$5 Billion	50%-60%	La Jolla	California
★★★★★	Marquette Associates	over \$10 Billion	30%-40%	Chicago	Illinois
★★★★★	CLG LLC	\$500 Million - \$1 Billion	30%-40%	Long Beach	California
★★★★★	Sprott Asset Management USA	\$1 Billion - \$5 Billion	more than 100%	Darien	Connecticut
★★★★★	Waypoint Capital Advisors	\$500 Million - \$1 Billion	30%-40%	Minneapolis	Minnesota
★★★★★	Align Impact	\$500 Million - \$1 Billion	40%-50%	Santa Monica	California
★★★★★	Cerity Partners	over \$10 Billion	30%-40%	New York	New York
★★★★★	High Probability Advisors	\$500 Million - \$1 Billion	60%-70%	Pittsford	New York

★★★★★	Jazz Wealth Managers	\$250 Million - \$500 Million	70%-80%	Largo	Florida
★★★★★	T. Rowe Price Advisory Services	\$1 Billion - \$5 Billion	40%-50%	Owings Mills	Maryland
★★★★★	Veratis Advisors	\$1 Billion - \$5 Billion	more than 100%	Cary	North Carolina
★★★★★	Circle Wealth Management	over \$10 Billion	40%-50%	Summit	New Jersey
★★★★★	Murphy & Sylvest	\$250 Million - \$500 Million	10%-20%	Dallas	Texas
★★★★★	Ritholtz Wealth Management	\$5 Billion - \$10 Billion	30%-40%	New York	New York
★★★★★	Fielder Capital Group	\$500 Million - \$1 Billion	40%-50%	Nashville	Tennessee
★★★★★	Guidestone Advisors	\$1 Billion - \$5 Billion	60%-70%	Dallas	Texas
★★★★★	Perigon Wealth Management	\$5 Billion - \$10 Billion	50%-60%	San Francisco	California

★★★★★	Ashton Thomas Private Wealth	\$1 Billion - \$5 Billion	50%-60%	Scottsdale	Arizona
★★★★★	Vann Equity Management	\$500 Million - \$1 Billion	80%-90%	Plano	Texas
★★★★★	One Oak Capital Management	\$250 Million - \$500 Million	10%-20%	Purchase	New York
★★★★★	Balboa Wealth Partners	\$500 Million - \$1 Billion	40%-50%	Scottsdale	Arizona
★★★★★	Beacon Pointe Advisors	over \$10 Billion	40%-50%	Newport Beach	California
★★★★★	Covenant Wealth Advisors	\$250 Million - \$500 Million	20%-30%	Richmond	Virginia
★★★★★	Klosters Capital	\$250 Million - \$500 Million	10%-20%	Miami	Florida
★★★★★	Integral Investment Advisors	\$250 Million - \$500 Million	20%-30%	Turlock	California
★★★★★	Clearbrook Investment Solutions	up to \$100 Million	-	New York	New York

★★★★★	Brainvest Wealth Management	\$1 Billion - \$5 Billion	50%-60%	Miami	Florida
★★★★★	Falcon Wealth Planning	\$1 Billion - \$5 Billion	40%-50%	Ontario	California
★★★★★	Pine Valley Investments	\$1 Billion - \$5 Billion	30%-40%	Marlton	New Jersey
★★★★★	Phraction Management	\$250 Million - \$500 Million	30%-40%	Colchester	Connecticut
★★★★★	WCG Wealth Advisors	\$5 Billion - \$10 Billion	20%-30%	Las Vegas	Nevada
★★★★★	MPWM Advisory Solutions	\$250 Million - \$500 Million	30%-40%	Alpharetta	Georgia
★★★★★	Prime Capital Investment Advisors	over \$10 Billion	10%-20%	Overland Park	Kansas
★★★★★	Insigneo Advisory Services	\$1 Billion - \$5 Billion	30%-40%	Miami	Florida
★★★★★	Quantinno Capital Management	\$1 Billion - \$5 Billion	70%-80%	New York	New York

★★★★★	Capital Creek Partners	\$1 Billion - \$5 Billion	50%-60%	Austin	Texas
★★★★★	Westwood Advisors	\$250 Million - \$500 Million	40%-50%	Dallas	Texas
★★★★★	Lido Advisors	over \$10 Billion	30%-40%	Los Angeles	California
★★★★★	Sequent Planning	\$250 Million - \$500 Million	30%-40%	Omaha	Nebraska
★★★★★	Clinton Investment Management	\$1 Billion - \$5 Billion	30%-40%	Stamford	Connecticut
★★★★★	Bulltack Wealth Management	\$1 Billion - \$5 Billion	40%-50%	Miami	Florida
★★★★★	Alexander Capital Wealth Management	up to \$100 Million	30%-40%	Red Bank	New Jersey
★★★★★	Aaron Wealth Advisors	\$1 Billion - \$5 Billion	50%-60%	Chicago	Illinois
★★★★★	Arin Risk Advisors	\$500 Million - \$1 Billion	50%-60%	Conshohocken	Pennsylvania

★★★★★	Aviso Wealth Management	\$250 Million - \$500 Million	30%-40%	Bellevue	Washington
★★★★★	Wealth Enhancement Advisory Services	over \$10 Billion	50%-60%	Plymouth	Minnesota
★★★★★	Logix Investments	up to \$100 Million	10%-20%	Cleveland	Ohio
★★★★★	Dimensional Fund Advisors	over \$10 Billion	5%-10%	Austin	Texas
★★★★★	Tectonic Advisors	\$1 Billion - \$5 Billion	20%-30%	Frisco	Texas
★★★★★	JFG Wealth Management	\$500 Million - \$1 Billion	40%-50%	Denver	Colorado
★★★★★	Avior Wealth Management	\$1 Billion - \$5 Billion	30%-40%	Omaha	Nebraska
★★★★★	Persium Advisors	\$250 Million - \$500 Million	20%-30%	Atlanta	Georgia
★★★★★	Blacktower Financial Management (US)	up to \$100 Million	20%-30%	Orlando	Florida

★★★★★	Pennington Partners & Co.	\$1 Billion - \$5 Billion	30%-40%	Bethesda	Maryland
★★★★★	Curated Wealth Partners	\$500 Million - \$1 Billion	50%-60%	El Segundo	California
★★★★★	ATCAP Partners	up to \$100 Million	40%-50%	Rockville	Maryland
★★★★★	RWA Wealth Partners	over \$10 Billion	20%-30%	Newton	Massachusetts
★★★★★	IDB Lido Wealth	up to \$100 Million	-	New York	New York
★★★★★	Fiduciary Alliance	\$1 Billion - \$5 Billion	50%-60%	Greenville	South Carolina
★★★★★	Manhattan West Asset Management	\$1 Billion - \$5 Billion	40%-50%	Los Angeles	California
★★★★★	Fifth Avenue Family Office	\$500 Million - \$1 Billion	10%-20%	Naples	Florida
★★★★★	Financial & Tax Architects	\$250 Million - \$500 Million	30%-40%	St. Louis	Missouri

★★★★★	401k Investment Professionals	up to \$100 Million	10%-20%	Wauunakee	Wisconsin
★★★★★	Angeles Wealth Management	\$1 Billion - \$5 Billion	40%-50%	Santa Monica	California
★★★★★	Quadrant Capital Group	\$1 Billion - \$5 Billion	30%-40%	Cincinnati	Ohio
★★★★★	Great Valley Advisor Group	\$5 Billion - \$10 Billion	30%-40%	Wilmington	Delaware
★★★★★	Custos Family Office	\$500 Million - \$1 Billion	30%-40%	Austin	Texas
★★★★★	Elevation Wealth Partners	\$250 Million - \$500 Million	20%-30%	Santa Rosa	California
★★★★★	Monere Wealth Management	up to \$100 Million	10%-20%	Schaumburg	Illinois
★★★★★	Hi-Line Capital Management	\$500 Million - \$1 Billion	10%-20%	Watertown	South Dakota
★★★★★	Castlekeep Investment Advisors	\$500 Million - \$1 Billion	5%-10%	Westport	Connecticut

★★★★★	Sage Advisory Services	over \$10 Billion	10%-20%	Austin	Texas
★★★★★	United Advisors America	\$250 Million - \$500 Million	30%-40%	Prosper	Texas
★★★★★	Stratos Wealth Advisors	\$1 Billion - \$5 Billion	50%-60%	Beachwood	Ohio
★★★★★	BlueChip Wealth Advisors	\$250 Million - \$500 Million	30%-40%	Milton	Georgia
★★★★★	Walkner Condon Financial Advisors	\$500 Million - \$1 Billion	40%-50%	Madison	Wisconsin
★★★★★	Cliffwater	over \$10 Billion	70%-80%	Marina Del Rey	California
★★★★★	Value Investment Professionals	up to \$100 Million	-	New York	New York
★★★★★	Winthrop Partners	up to \$100 Million	30%-40%	Buffalo	New York
★★★★★	Wick Capital Partners	\$250 Million - \$500 Million	30%-40%	Wayne	Pennsylvania
★★★★★	Concurrent Investment	\$5 Billion -	-	Tampa	Florida

	Advisors	\$10 Billion			
★★★★★	Kingswood Wealth Advisors	\$1 Billion - \$5 Billion	40%-50%	San Diego	California
★★★★★	Oak Harvest Investment Services	\$500 Million - \$1 Billion	40%-50%	Houston	Texas
★★★★★	Southstate Advisory	\$1 Billion - \$5 Billion	50%-60%	Columbia	South Carolina
★★★★★	CS Planning Corp.	\$500 Million - \$1 Billion	10%-20%	Portland	Oregon
★★★★★	Duncan Williams Asset Management	\$1 Billion - \$5 Billion	50%-60%	Memphis	Tennessee
★★★★★	W&S Brokerage Services	up to \$100 Million	-	Cincinnati	Ohio
★★★★★	Abound Wealth Management	\$1 Billion - \$5 Billion	30%-40%	Franklin	Tennessee
★★★★★	Blake Schutter Theil Wealth Advisors	\$250 Million - \$500 Million	-	Dayton	Ohio
★★★★★	Nicholas Hoffman &	\$5 Billion -	50%-60%	Atlanta	Georgia

	Company	\$10 Billion			
★★★★★	Waterloo Capital	\$1 Billion - \$5 Billion	10%-20%	Austin	Texas
★★★★★	Redhawk Wealth Advisors	\$1 Billion - \$5 Billion	10%-20%	Bloomington	Minnesota
★★★★★	Elite Life Management	up to \$100 Million	-	Erie	Pennsylvania
★★★★★	M.D. Sass	\$1 Billion - \$5 Billion	30%-40%	New York	New York
★★★★★	Farther Finance Advisors	\$1 Billion - \$5 Billion	-	San Francisco	California
★★★★★	Jackson Hole Capital Partners	\$500 Million - \$1 Billion	30%-40%	Tulsa	Oklahoma
★★★★★	Aprio Wealth Management	\$1 Billion - \$5 Billion	20%-30%	Atlanta	Georgia
★★★★★	Strategic Wealth Partners	\$1 Billion - \$5 Billion	30%-40%	Independence	Ohio

★★★★★	Live Oak Private Wealth	\$500 Million - \$1 Billion	40%-50%	Wilmington	North Carolina
★★★★★	Regan Capital	\$1 Billion - \$5 Billion	upto 5%	Dallas	Texas
★★★★★	Americana Partners	\$1 Billion - \$5 Billion	20%-30%	Houston	Texas
★★★★★	Soltis Investment Advisors	\$5 Billion - \$10 Billion	40%-50%	St. George	Utah
★★★★★	Clifford Capital Partners	\$250 Million - \$500 Million	10%-20%	Alpine	Utah
★★★★★	Connecticut Wealth Management	\$1 Billion - \$5 Billion	30%-40%	Farmington	Connecticut
★★★★★	Resonant Capital Advisors	\$1 Billion - \$5 Billion	30%-40%	Madison	Wisconsin
★★★★★	Kovitz Investment Group Partners	over \$10 Billion	20%-30%	Chicago	Illinois
★★★★★	INVST	\$1 Billion - \$5 Billion	30%-40%	Indianapolis	Indiana

★★★★★	Earned Wealth	up to \$100 Million	-	New York	New York
★★★★★	Wilian Securities	up to \$100 Million	-	Vadnais Heights	Minnesota
★★★★★	Buckhead Capital Management	\$1 Billion - \$5 Billion	30%-40%	Atlanta	Georgia
★★★★★	Navy Federal Investment Services	\$1 Billion - \$5 Billion	20%-30%	Vienna	Virginia
★★★★★	Global Financial Group Advisors	\$500 Million - \$1 Billion	10%-20%	Grand Rapids	Michigan
★★★★★	ABG Consultants	\$500 Million - \$1 Billion	5%-10%	Salt Lake City	Utah
★★★★★	Apollon Financial	\$250 Million - \$500 Million	-	Mount Pleasant	South Carolina
★★★★★	Coldstream Capital Management Inc.	\$5 Billion - \$10 Billion	20%-30%	Bellevue	Washington
★★★★★	Compound Family Offices	\$250 Million - \$500 Million	20%-30%	Sarasota	Florida

★★★★★	Strata Wealth Advisors	\$500 Million - \$1 Billion	30%-40%	Dallas	Texas
★★★★★	Heirloom Wealth Management	\$250 Million - \$500 Million	20%-30%	Greenwood Village	Colorado
★★★★★	KDT Advisors	up to \$100 Million	30%-40%	Brooklyn	New York
★★★★★	EP Wealth Advisors	over \$10 Billion	30%-40%	Torrance	California
★★★★★	Mission Wealth Management	\$5 Billion - \$10 Billion	30%-40%	Santa Barbara	California
★★★★★	Truewealth Advisors	\$250 Million - \$500 Million	40%-50%	Hoover	Alabama
★★★★★	Eaton-Cambridge	\$250 Million - \$500 Million	20%-30%	Phoenix	Arizona
★★★★★	PGIM Custom Harvest	\$1 Billion - \$5 Billion	90%-100%	Newark	New Jersey
★★★★★	Spyglass Capital Management	\$1 Billion - \$5 Billion	40%-50%	San Francisco	California

★★★★★	Castlepoint Wealth Advisors	\$500 Million - \$1 Billion	20%-30%	Oklahoma City	Oklahoma
★★★★★	Fort Sheridan Advisors	\$500 Million - \$1 Billion	20%-30%	Highland Park	Illinois
★★★★★	McAdam	\$1 Billion - \$5 Billion	30%-40%	Philadelphia	Pennsylvania
★★★★★	Dynamic Advisor Solutions	\$1 Billion - \$5 Billion	20%-30%	Phoenix	Arizona
★★★★★	Portfolio Medics	\$250 Million - \$500 Million	30%-40%	Bonita Springs	Florida
★★★★★	Heron Bay Capital Management	\$500 Million - \$1 Billion	-	Bloomfield Hills	Michigan
★★★★★	Service Academy Capital Management	\$500 Million - \$1 Billion	30%-40%	Dallas	Texas
★★★★★	Cogentblue Wealth Advisors	\$500 Million - \$1 Billion	-	Knoxville	Tennessee
★★★★★	Mercer Global Advisors	over \$10 Billion	30%-40%	Denver	Colorado

★★★★★	Westfuller Advisors	\$1 Billion - \$5 Billion	70%-80%	New York	New York
★★★★★	QP Global Family Offices	\$1 Billion - \$5 Billion	30%-40%	Greenwich	Connecticut
★★★★★	DGS Capital Management	\$250 Million - \$500 Million	30%-40%	Jersey City	New Jersey
★★★★★	Castleark Management	\$1 Billion - \$5 Billion	upto 5%	Chicago	Illinois
★★★★★	Andina Capital Management	\$500 Million - \$1 Billion	20%-30%	Lehi	Utah
★★★★★	NEPC	over \$10 Billion	30%-40%	Boston	Massachusetts
★★★★★	CAPTRUST	over \$10 Billion	20%-30%	Raleigh	North Carolina
★★★★★	MONECO Advisors	\$1 Billion - \$5 Billion	30%-40%	Fairfield	Connecticut
★★★★★	Uhler Vertich White Advisors	\$250 Million - \$500 Million	10%-20%	Fort Myers	Florida

★★★★★	Objective Capital Management	\$250 Million - \$500 Million	20%-30%	Pepper Pike	Ohio
★★★★★	Lavelle Capital	\$250 Million - \$500 Million	-	San Francisco	California
★★★★★	Encompass More Asset Management	up to \$100 Million	-	Danville	California
★★★★★	Stiles Financial Services Incorporated	\$250 Million - \$500 Million	more than 100%	Edina	Minnesota
★★★★★	Siebert AdvisorNXT	up to \$100 Million	30%-40%	New York	New York
★★★★★	Artemis Financial Advisors	\$250 Million - \$500 Million	10%-20%	Boston	Massachusetts
★★★★★	OneSeven	\$1 Billion - \$5 Billion	30%-40%	Beachwood	Ohio
★★★★★	Journey Advisory Group	\$1 Billion - \$5 Billion	40%-50%	Covington	Kentucky
★★★★★	Visionary Wealth Advisors	\$1 Billion - \$5 Billion	30%-40%	St. Louis	Missouri

★★★★★	McGlone Suttner Wealth Management	\$500 Million - \$1 Billion	40%-50%	Appleton	Wisconsin
★★★★★	The Sum	\$250 Million - \$500 Million	-	The Woodlands	Texas
★★★★★	Twelve Points Wealth Management	\$1 Billion - \$5 Billion	20%-30%	Concord	Massachusetts
★★★★★	Terra Wealth Management	\$250 Million - \$500 Million	-	High Point	North Carolina
★★★★★	Wise Wealth	\$250 Million - \$500 Million	10%-20%	Lee's Summit	Missouri
★★★★★	NorthRock Partners	\$5 Billion - \$10 Billion	30%-40%	Minneapolis	Minnesota
★★★★★	Apella Capital	\$1 Billion - \$5 Billion	40%-50%	West Hartford	Connecticut
★★★★★	Aston Capital Management	\$500 Million - \$1 Billion	10%-20%	Coral Gables	Florida
★★★★★	Solstein Capital	\$500 Million -	20%-30%	Menlo Park	California

		\$1 Billion			
★★★★★	Revolve Wealth Partners	\$1 Billion - \$5 Billion	20%-30%	Hackensack	New Jersey
★★★★★	Root Financial Partners	\$250 Million - \$500 Million	-	Solana Beach	California
★★★★★	Retirable	up to \$100 Million	-	New York	New York
★★★★★	One Group Wealth Partners	up to \$100 Million	-	Syracuse	New York
★★★★★	Prudent Investor Advisors	\$1 Billion - \$5 Billion	10%-20%	Folsom	California
★★★★★	Total Clarity Wealth Management	\$250 Million - \$500 Million	20%-30%	St. Charles	Illinois
★★★★★	Aristotle Capital Management	\$1 Billion - \$5 Billion	50%-60%	Sarasota	Florida
★★★★★	Kera Capital Partners	\$500 Million - \$1 Billion	-	San Jose	California
★★★★★	Resolute Advisors	\$1 Billion -	30%-40%	San Francisco	California

		\$5 Billion			
★★★★★	Moss Luse & Womble	\$250 Million - \$500 Million	30%-40%	Plano	Texas
★★★★★	Symphony Financial	\$500 Million - \$1 Billion	20%-30%	Houston	Texas
★★★★★	Waycross Partners	\$500 Million - \$1 Billion	40%-50%	Louisville	Kentucky
★★★★★	ShariaPortfolio	\$500 Million - \$1 Billion	60%-70%	Lake Mary	Florida
★★★★★	Daymark Wealth Partners	\$1 Billion - \$5 Billion	-	Cincinnati	Ohio
★★★★★	Ramirez Asset Management	\$5 Billion - \$10 Billion	30%-40%	New York	New York
★★★★★	Intrua Financial	\$1 Billion - \$5 Billion	20%-30%	Houston	Texas
★★★★★	Pinion Investment Advisors	\$250 Million - \$500 Million	20%-30%	Wichita	Kansas

★★★★★	FiduciaryVest	\$1 Billion - \$5 Billion	-	Atlanta	Georgia
★★★★★	Pallas Capital Advisors	\$1 Billion - \$5 Billion	-	Braintree	Massachusetts
★★★★★	Equita Financial Network	\$250 Million - \$500 Million	-	Fort Washington	Pennsylvania
★★★★★	Buck Wealth Strategies	\$250 Million - \$500 Million	-	Denver	Colorado
★★★★½	DBS Investment Advisers	up to \$100 Million	10%-20%	Bay City	Michigan
★★★★½	Secfi Advisory Limited	up to \$100 Million	-	New York	New York
★★★★½	Merit Financial Group	\$5 Billion - \$10 Billion	30%-40%	Alpharetta	Georgia
★★★★½	Wealth Watch Advisors	\$250 Million - \$500 Million	5%-10%	Englewood	Colorado
★★★★½	Thrive Wealth Management	\$1 Billion - \$5 Billion	30%-40%	Audubon	Pennsylvania

★★★★½	Class VI Family Office	\$1 Billion - \$5 Billion	30%-40%	Denver	Colorado
★★★★½	Tempus Wealth Planning	\$250 Million - \$500 Million	30%-40%	Irvine	California
★★★★½	Invex Advisors	\$500 Million - \$1 Billion	10%-20%	Coral Gables	Florida
★★★★½	Tidal Investments	over \$10 Billion	60%-70%	Milwaukee	Wisconsin
★★★★½	49 Wealth Management	\$500 Million - \$1 Billion	-	Austin	Texas
★★★★½	Transcend Capital Advisors	\$1 Billion - \$5 Billion	30%-40%	Madison	New Jersey
★★★★½	Savant Wealth Management	over \$10 Billion	30%-40%	Rockford	Illinois
★★★★½	New Potomac Partners	up to \$100 Million	5%-10%	North Bethesda	Maryland
★★★★½	Destiny Wealth Partners	\$500 Million - \$1 Billion	more than 100%	Tavares	Florida

★★★★½	Goalvest Advisory	\$250 Million - \$500 Million	40%-50%	New York	New York
★★★★½	Sequoia Financial Advisors	over \$10 Billion	30%-40%	Akron	Ohio
★★★★½	PGI Wealth Management	\$500 Million - \$1 Billion	-	Milton	Georgia
★★★★½	Coordinated Financial Services	\$250 Million - \$500 Million	-	Denver	Colorado
★★★★½	Obsidian Personal Planning Solutions	\$250 Million - \$500 Million	10%-20%	Rockville	Maryland
★★★★½	Collective Family Office	\$250 Million - \$500 Million	20%-30%	York	Pennsylvania
★★★★½	Journey Wealth Management	\$500 Million - \$1 Billion	20%-30%	Cleveland	Ohio
★★★★½	Clarendon Private	\$250 Million - \$500 Million	-	Boston	Massachusetts
★★★★½	Summit Global Investments	\$1 Billion - \$5 Billion	10%-20%	Bountiful	Utah

★★★★½	Alliance Advisory & Securities	\$500 Million - \$1 Billion	20%-30%	Westlake Village	California
★★★★½	New Horizon Financial Strategies	up to \$100 Million	-	Ithaca	New York
★★★★½	Princeton Global Asset Management	\$500 Million - \$1 Billion	20%-30%	Princeton	New Jersey
★★★★½	CBIZ Investment Advisory Services	\$5 Billion - \$10 Billion	30%-40%	Cleveland	Ohio
★★★★½	Varra Wealth Management	up to \$100 Million	-	Louisville	Colorado
★★★★½	H&H Retirement Design and Management, Inc.	up to \$100 Million	10%-20%	Las Vegas	Nevada
★★★★½	401K Generation	up to \$100 Million	5%-10%	Altamonte Springs	Florida
★★★★½	Lesko Securities	\$250 Million - \$500 Million	30%-40%	Vestal	New York
★★★★½	Ally Invest Advisors Inc.	\$1 Billion - \$5 Billion	40%-50%	Charlotte	North Carolina

★★★★½	TFB Advisors	\$500 Million - \$1 Billion	-	Overland Park	Kansas
★★★★½	The Patriot Financial Group	\$1 Billion - \$5 Billion	40%-50%	Walpole	Massachusetts
★★★★½	Fiducient Advisors	over \$10 Billion	30%-40%	Chicago	Illinois
★★★★½	Compass Advisory Group	\$500 Million - \$1 Billion	30%-40%	Melville	New York
★★★★½	XML Financial Group	\$1 Billion - \$5 Billion	40%-50%	Bethesda	Maryland
★★★★½	Media Wealth	up to \$100 Million	-	Pleasanton	California
★★★★½	JVL Wealth Strategies	\$500 Million - \$1 Billion	20%-30%	Wyoming	Michigan
★★★★½	Range Advisory	up to \$100 Million	-	McLean	Virginia
★★★★½	One Day In July	\$500 Million - \$1 Billion	20%-30%	Burlington	Vermont

★★★★½	Emergent Financial Services	\$1 Billion - \$5 Billion	upto 5%	Charlottesville	Virginia
★★★★½	Concentrum Wealth Management	\$500 Million - \$1 Billion	30%-40%	San Jose	California
★★★★½	Orion Portfolio Solutions	over \$10 Billion	40%-50%	Omaha	Nebraska
★★★★½	Maia Wealth	\$250 Million - \$500 Million	-	Denver	Colorado
★★★★½	Marble Trail Advisors	\$250 Million - \$500 Million	20%-30%	Middlebury	Vermont
★★★★½	Sophis Investments	up to \$100 Million	30%-40%	New York	New York
★★★★½	Match Grade Advisors	\$250 Million - \$500 Million	10%-20%	Greenville	South Carolina
★★★★½	True Wealth Design	\$500 Million - \$1 Billion	30%-40%	Akron	Ohio
★★★★½	First Advisors National	\$250 Million - \$500 Million	20%-30%	Atlanta	Georgia

★★★★½	Legacy Capital Wealth Partners	\$1 Billion - \$5 Billion	30%-40%	Little Rock	Arkansas
★★★★½	Tamar Securities	\$1 Billion - \$5 Billion	20%-30%	Woodland Hills	California
★★★★½	Alera Investment Advisors	\$1 Billion - \$5 Billion	30%-40%	Deerfield	Illinois
★★★★½	Virtera Partners	\$250 Million - \$500 Million	-	Pepper Pike	Ohio
★★★★½	Wellspring Financial Advisors	\$1 Billion - \$5 Billion	20%-30%	Cleveland	Ohio
★★★★½	Rooted Planning Group	up to \$100 Million	20%-30%	Corning	New York
★★★★½	Global Strategic Investment Solutions	\$1 Billion - \$5 Billion	30%-40%	Scottsdale	Arizona
★★★★½	Rogan & Associates	\$500 Million - \$1 Billion	10%-20%	Safety Harbor	Florida
★★★★½	Sigfig Wealth Management	\$1 Billion - \$5 Billion	40%-50%	San Francisco	California

★★★★½	Keener Financial Planning	\$250 Million - \$500 Million	10%-20%	Keller	Texas
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
	Financial	\$1 Billion			
★★★★½	American Fundstars	up to \$100 Million	-	Newport Beach	California
★★★★½	Smart Portfolios	up to \$100 Million	upto 5%	Lake Forest Park	Washington
★★★★½	Fisher Investments	over \$10 Billion	20%-30%	Plano	Texas
★★★★½	Global Retirement Partners	over \$10 Billion	20%-30%	San Rafael	California
	S.E.E.D.	\$250 Million -			
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
		Billion			
★★★★½	Home For Hybrids	\$5 Billion -	-	Las Vegas	Nevada

		\$10 Billion			
★★★★½	Claro Advisors	\$1 Billion - \$5 Billion	20%-30%	Boston	Massachusetts
★★★★½	LEO Wealth	\$1 Billion - \$5 Billion	20%-30%	Hurst	Texas
★★★★½	Chicago Capital	\$1 Billion - \$5 Billion	10%-20%	Chicago	Illinois
★★★★½	The Baldwin Group	\$1 Billion - \$5 Billion	20%-30%	Bethesda	Maryland
★★★★½	Fi3 Financial Advisors	\$500 Million - \$1 Billion	20%-30%	Indianapolis	Indiana
★★★★½	TCP Asset Management	\$500 Million - \$1 Billion	20%-30%	Columbus	Ohio
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Investments	\$10 Billion	-	Washington	Columbia
★★★★½	Regis Management	\$1 Billion -	-	Denver	Colorado

	Company	\$5 Billion			
★★★★½	One Capital Management	\$5 Billion - \$10 Billion	30%-40%	Westlake Village	California
★★★★½	Imperial Capital Partners	\$5 Billion - \$10 Billion	-	Hollywood	Florida
★★★★½	Trajan Wealth	\$1 Billion - \$5 Billion	30%-40%	Scottsdale	Arizona
★★★★½	Foster Victor Wealth Advisors	\$1 Billion - \$5 Billion	30%-40%	Greenville	South Carolina
★★★★½	Fiat Wealth Management	\$250 Million - \$500 Million	-	Wayzata	Minnesota
★★★★½	Asset Strategy Consultants	\$5 Billion - \$10 Billion	-	Hunt Valley	Maryland
		\$500 Million			
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Wealth	\$100 Million	-	NEW YORK	NEW YORK

★★★★½	Moody Aldrich Partners	\$500 Million - \$1 Billion	10%-20%	Marblehead	Massachusetts
★★★★½	Squire Wealth Advisors	\$250 Million - \$500 Million	10%-20%	Orem	Utah
★★★★½	Navigate Wealth Management	\$250 Million - \$500 Million	10%-20%	Birmingham	Alabama
★★★★½	Professional Financial Advisors	\$250 Million - \$500 Million	20%-30%	North Platte	Nebraska
★★★★½	Element Pointe Family Office	\$500 Million - \$1 Billion	10%-20%	Miami	Florida
★★★★½	Pioneer Family Office	\$500 Million - \$1 Billion	10%-20%	North Miami Beach	Florida
★★★★½	Dougherty Wealth Advisors	\$250 Million - \$500 Million	20%-30%	Wayzata	Minnesota
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Magnolia Capital Advisors	\$1 Billion -	20%-30%	Jackson	Mississippi

		\$5 Billion			
★★★★½	Seaview Investment Managers	\$1 Billion - \$5 Billion	20%-30%	Coral Gables	Florida
★★★★½	Carlson Financial	\$500 Million - \$1 Billion	20%-30%	Topeka	Kansas
★★★★½	Aptus Capital Advisors	\$5 Billion - \$10 Billion	30%-40%	Fairhope	Alabama
★★★★½	Ulrich Investment Consultants	\$1 Billion - \$5 Billion	20%-30%	Albuquerque	New Mexico
★★★★½	The H Group Washington	up to \$100 Million	20%-30%	Portland	Oregon
★★★★½	Allworth Financial	over \$10 Billion	40%-50%	Folsom	California
★★★★½	Lawson Kroeker	\$500 Million - \$1 Billion	10%-20%	Omaha	Nebraska
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Ignite Planners	\$500 Million - \$1 Billion	40%-50%	San Clemente	California

		\$1 Billion			
★★★★½	Advisors Capital Management	\$5 Billion - \$10 Billion	20%-30%	Ridgewood	New Jersey
★★★★½	EQ Wealth Advisors	\$250 Million - \$500 Million	-	Dallas	Texas
★★★★½	PFG Advisors	\$1 Billion - \$5 Billion	20%-30%	Phoenix	Arizona
★★★★½	Aldrich Wealth	\$5 Billion - \$10 Billion	20%-30%	Lake Oswego	Oregon
★★★★½	Ruggaard & Associates	\$250 Million - \$500 Million	10%-20%	Hudson	Ohio
★★★★½	Peconic Partners	\$1 Billion - \$5 Billion	30%-40%	New York	New York
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Enhancing Capital	Million - \$500 Million	upto 5%	Harrisburg	Pennsylvania

★★★★½	Clear Investment Research	\$5 Billion - \$10 Billion	5%-10%	Alpharetta	Georgia
★★★★½	BPP Wealth Solutions	up to \$100 Million	30%-40%	Basking Ridge	New Jersey
★★★★½	Garde Capital	\$1 Billion - \$5 Billion	10%-20%	Seattle	Washington
★★★★½	Diversified	\$1 Billion - \$5 Billion	30%-40%	Wilmington	Delaware
★★★★½	Sentry Advisors	\$1 Billion - \$5 Billion	10%-20%	San Francisco	California
★★★★½	Multnomah Group	\$1 Billion - \$5 Billion	10%-20%	Portland	Oregon
★★★★½	Cross Border Wealth	up to \$100 Million	20%-30%	New York	New York
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Marshall & Sterling Wealth Advisors	Million - \$1 Billion	40%-50%	Poughkeepsie	New York

★★★★½	Mutual Advisors	\$5 Billion - \$10 Billion	30%-40%	Omaha	Nebraska
★★★★½	Aspen Wealth Management	\$250 Million - \$500 Million	20%-30%	Fort Worth	Texas
★★★★½	LJI Wealth Management	\$500 Million - \$1 Billion	20%-30%	Indianapolis	Indiana
★★★★½	Clare Market Investments	\$250 Million - \$500 Million	20%-30%	Dallas	Texas
★★★★½	Plan A Wealth	\$250 Million - \$500 Million	20%-30%	Lincoln	Nebraska
★★★★½	Tranquility Partners	\$500 Million - \$1 Billion	20%-30%	Brentwood	Tennessee
★★★★½	Leelyn Smith	\$500 Million - \$1 Billion	20%-30%	Geneva	Illinois
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Centerpoint Advisory Group	up to \$100 Million	-	Overland Park	Kansas

★★★★½	FFT Wealth Management	\$1 Billion - \$5 Billion	10%-20%	Philadelphia	Pennsylvania
★★★★½	Oak Wealth Advisors	\$250 Million - \$500 Million	10%-20%	Northbrook	Illinois
★★★★½	Wealthspire Advisors	over \$10 Billion	30%-40%	New York	New York
★★★★½	Core Capital Management & Research	\$1 Billion - \$5 Billion	40%-50%	Houston	Texas
★★★★½	Accel Wealth Management	\$500 Million - \$1 Billion	20%-30%	Waverly	Iowa
★★★★½	Asio Capital	\$250 Million - \$500 Million	30%-40%	Lexington	Kentucky
★★★★½	Hollander Asset Management	\$500 Million - \$1 Billion	5%-10%	Miami	Florida
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Johnson Wealth	\$5 Billion - \$10 Billion	10%-20%	Milwaukee	Wisconsin

★★★★½	PracticeCFO Investments	\$250 Million - \$500 Million	-	San Diego	California
★★★★½	Riversedge Advisors	\$500 Million - \$1 Billion	20%-30%	Wilmington	Delaware
★★★★½	Rockwood Wealth Management	\$1 Billion - \$5 Billion	20%-30%	New Hope	Pennsylvania
★★★★½	Smith Brothers Financial	\$500 Million - \$1 Billion	-	Glastonbury	Connecticut
★★★★½	GenTrust	\$1 Billion - \$5 Billion	20%-30%	Miami	Florida
★★★★½	Lumiere Financial Group	up to \$100 Million	-	New York	New York
★★★★½	The Retirement Planning Group	\$1 Billion - \$5 Billion	20%-30%	Leawood	Kansas
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Courier Capital	Billion - \$5 Billion	10%-20%	Buffalo	New York

★★★★½	Certior Financial Group	\$250 Million - \$500 Million	10%-20%	King of Prussia	Pennsylvania
★★★★½	Revisor Wealth Management	\$1 Billion - \$5 Billion	-	Akron	Ohio
★★★★½	Stelac Advisory Services	\$1 Billion - \$5 Billion	10%-20%	New York	New York
★★★★½	Venturi Wealth Management	\$1 Billion - \$5 Billion	10%-20%	Austin	Texas
★★★★½	Fort Point Capital Partners	\$1 Billion - \$5 Billion	10%-20%	San Francisco	California
★★★★½	Talson Capital Management	\$500 Million - \$1 Billion	5%-10%	Darien	Connecticut
★★★★½	Arta Finance Wealth Management	up to \$100 Million	-	Mountain View	California
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Pasadena Private Wealth	\$1 Billion - \$5 Billion	20%-30%	Pasadena	California

★★★★½	Hobbs Group Advisors	\$250 Million - \$500 Million	20%-30%	Columbia	South Carolina
★★★★½	Merit Financial Partners	\$250 Million - \$500 Million	20%-30%	Maspeth	New York
★★★★½	Sepio Capital	\$5 Billion - \$10 Billion	10%-20%	Salt Lake City	Utah
★★★★½	Financial Focus	\$500 Million - \$1 Billion	20%-30%	Carlsbad	California
★★★★½	Scissortail Wealth Management	\$250 Million - \$500 Million	20%-30%	Tulsa	Oklahoma
★★★★½	VectorGlobal IAG	\$1 Billion - \$5 Billion	30%-40%	Miami	Florida
★★★★½	Alta Wealth Advisors	\$250 Million - \$500	20%-30%	Woburn	Massachusetts
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Paragon Advisors	\$500 Million - \$1 Billion	20%-30%	College Station	Texas

★★★★½	Clear Haven Capital Management	\$250 Million - \$500 Million	40%-50%	New York	New York
★★★★½	Wambolt & Associates	\$500 Million - \$1 Billion	20%-30%	Littleton	Colorado
★★★★½	Olio Financial Planning	\$250 Million - \$500 Million	20%-30%	McLean	Virginia
★★★★½	Empirical Wealth Management	\$5 Billion - \$10 Billion	20%-30%	Seattle	Washington
★★★★½	1900 Wealth Management	\$1 Billion - \$5 Billion	30%-40%	San Antonio	Texas
★★★★½	Two West Capital Advisors	\$1 Billion - \$5 Billion	10%-20%	Overland Park	Kansas
★★★★½	Lake Street Private Wealth	\$500 Million - \$1 Billion	20%-30%	Chicago	Illinois
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Traynor Capital Management	\$1 Billion -	30%-40%	Malvern	Pennsylvania

		\$5 Billion			
★★★★½	Baybridge Capital Group	up to \$100 Million	30%-40%	Pleasanton	California
★★★★½	Brighton Jones	over \$10 Billion	10%-20%	Seattle	Washington
★★★★½	Suncoast Equity Management	\$1 Billion - \$5 Billion	20%-30%	Tampa	Florida
★★★★½	Prosperitas Financial	\$250 Million - \$500 Million	-	Valencia	California
★★★★½	Withum Wealth Management	\$1 Billion - \$5 Billion	20%-30%	Red Bank	New Jersey
★★★★½	Signal Advisors Wealth	\$250 Million - \$500 Million	-	Detroit	Michigan
★★★★½	Cary Street Partners	\$5 Billion - \$10 Billion	30%-40%	Richmond	Virginia
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State

★★★★½	Palo Alto Wealth Advisors	\$500 Million - \$1 Billion	20%-30%	Palo Alto	California
★★★★½	Wealth Management CPAs	up to \$100 Million	-	Salt Lake City	Utah
★★★★½	Sage Capital Advisors	\$500 Million - \$1 Billion	10%-20%	Sioux Falls	South Dakota
★★★★½	Avestar Capital	\$1 Billion - \$5 Billion	30%-40%	New York	New York
★★★★½	Paradigm Wealth Management	\$250 Million - \$500 Million	10%-20%	Westlake	Ohio
★★★★½	Financial Advisors Network	\$500 Million - \$1 Billion	20%-30%	Tustin	California
★★★★½	Principle Wealth Partners	\$1 Billion - \$5 Billion	20%-30%	Madison	Connecticut
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Intellicents Investment Solutions Inc.	\$5 Billion - \$10 Billion	5%-10%	Albert Lea	Minnesota

★★★★½	Sandy Cove Advisors	\$250 Million - \$500 Million	20%-30%	Hingham	Massachusetts
★★★★½	Evoke Advisors	over \$10 Billion	-	Los Angeles	California
★★★★½	Little House Capital	\$500 Million - \$1 Billion	20%-30%	Braintree	Massachusetts
★★★★½	Flourish Wealth Management	\$250 Million - \$500 Million	20%-30%	Edina	Minnesota
★★★★½	Sentinel Pension Advisors Inc.	\$5 Billion - \$10 Billion	10%-20%	Wakefield	Massachusetts
★★★★½	Tandem Investment Advisors Inc.	\$1 Billion - \$5 Billion	40%-50%	Charleston	South Carolina
★★★★½	TLWM	\$250 Million - \$500 Million	10%-20%	San Antonio	Texas
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Chicago Partners Investment Group	\$1 Billion - \$5 Billion	20%-30%	Chicago	Illinois

★★★★½	Bouchey Financial Group	\$1 Billion - \$5 Billion	20%-30%	Troy	New York
★★★★½	Mayfair Advisory Group	\$500 Million - \$1 Billion	-	Birmingham	Alabama
★★★★½	Adaptive Financial Consulting	\$250 Million - \$500 Million	20%-30%	Beachwood	Ohio
★★★★½	Visionary Horizons	\$250 Million - \$500 Million	10%-20%	Knoxville	Tennessee
★★★★½	Tschetter Group	\$1 Billion - \$5 Billion	20%-30%	Bellevue	Washington
★★★★½	SBB Research Group	\$1 Billion - \$5 Billion	40%-50%	Northbrook	Illinois
★★★★½	Nomad Fintech Inc.	up to \$100 Million	-	Menlo Park	California
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Amicus Financial Advisors	\$250 Million - \$500 Million	20%-30%	Lubbock	Texas

★★★★½	Paces Ferry Wealth Advisors	\$250 Million - \$500 Million	10%-20%	Atlanta	Georgia
★★★★½	SGL Financial	up to \$100 Million	20%-30%	Buffalo Grove	Illinois
★★★★½	Capital Wealth Planning	\$5 Billion - \$10 Billion	50%-60%	Naples	Florida
★★★★½	Tradition Wealth Management	\$1 Billion - \$5 Billion	20%-30%	Edina	Minnesota
★★★★½	Bigsur Wealth Management	\$1 Billion - \$5 Billion	5%-10%	Miami	Florida
★★★★½	MAS Advisors	\$1 Billion - \$5 Billion	20%-30%	Miami	Florida
★★★★½	WealthEdge Investment Advisors	\$250 Million - \$500 Million	10%-20%	New York	New York
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Hub Investment Partners	\$5 Billion - \$10 Billion	-	Austin	Texas

★★★★½	Oak Crest Advisory	up to \$100 Million	-	Rochester	New York
★★★★½	Montrose Advisors Incorporated	\$250 Million - \$500 Million	20%-30%	New York	New York
★★★★½	Bancolumbia Capital Advisers	up to \$100 Million	-	Miami	Florida
★★★★½	The Main Street Group	\$250 Million - \$500 Million	20%-30%	Glen Allen	Virginia
★★★★½	Gill Capital Partners	\$500 Million - \$1 Billion	20%-30%	Denver	Colorado
★★★★½	Red Door Wealth Management	\$1 Billion - \$5 Billion	30%-40%	Memphis	Tennessee
★★★★½	Inscription Capital	\$1 Billion - \$5 Billion	20%-30%	Houston	Texas
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Investment Management	\$100 Million	10%-20%	Houston	Texas

★★★★½	Private Advisory Group	\$500 Million - \$1 Billion	20%-30%	Redmond	Washington
★★★★½	DecisionPoint Financial	\$500 Million - \$1 Billion	20%-30%	Mesa	Arizona
★★★★½	PASI Investments	\$500 Million - \$1 Billion	10%-20%	Farmington	Connecticut
★★★★½	Sovereign Financial Group	\$500 Million - \$1 Billion	20%-30%	Stamford	Connecticut
★★★★½	Steelpeak Wealth	\$1 Billion - \$5 Billion	20%-30%	Woodland Hills	California
★★★★½	Sloy Dahl & Holst	\$1 Billion - \$5 Billion	10%-20%	Vancouver	Washington
★★★★½	BCS Private Wealth	\$250 Million - \$500	20%-30%	Rumson	New Jersey
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Lifeworks Advisors	\$250 Million -	-	Grand Rapids	Michigan

		\$500 Million			
★★★★½	Operose Advisors	\$1 Billion - \$5 Billion	-	Milwaukee	Wisconsin
★★★★½	Retirement Plan Advisors	\$1 Billion - \$5 Billion	20%-30%	Chicago	Illinois
★★★★½	U.S. Capital Wealth Advisors	\$5 Billion - \$10 Billion	30%-40%	Houston	Texas
★★★★½	Jackson Square Capital	\$250 Million - \$500 Million	10%-20%	San Francisco	California
★★★★½	Crestwood Advisors Group	\$5 Billion - \$10 Billion	10%-20%	Boston	Massachusetts
★★★★½	United Financial Planning Group	up to \$100 Million	20%-30%	Hauppauge	New York
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Management Associates Inc.	\$1 Billion - \$5 Billion	10%-20%	Minneapolis	Minnesota

★★★★½	Omega Wealth Management	\$250 Million - \$500 Million	20%-30%	Arlington	Virginia
★★★★½	Hahn Financial Group	up to \$100 Million	20%-30%	Sioux Falls	South Dakota
★★★★½	Breakwater Capital Group	\$500 Million - \$1 Billion	-	Paramus	New Jersey
★★★★½	Omni 360 Wealth	up to \$100 Million	-	Plainsboro	New Jersey
★★★★½	Adamo Capital Family Office	\$1 Billion - \$5 Billion	-	Miami	Florida
★★★★½	Henrickson Nauta Wealth Advisors	\$500 Million - \$1 Billion	20%-30%	Belmont	Michigan
★★★★½	Oakmont Wealth Advisory	\$250 Million - \$500 Million	10%-20%	Reston	Virginia
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Krilogy Financial	Billion - \$5 Billion	10%-20%	St. Louis	Missouri

★★★★½	Life Line Wealth Management	\$250 Million - \$500 Million	20%-30%	Beverly Hills	California
★★★★½	Marcum Wealth	\$1 Billion - \$5 Billion	20%-30%	Cleveland	Ohio
★★★★½	Financial Harvest	\$250 Million - \$500 Million	20%-30%	Winter Park	Florida
★★★★½	Zermatt Wealth Partners	up to \$100 Million	-	San Diego	California
★★★★½	Optima Asset Management	\$500 Million - \$1 Billion	-	New York	New York
★★★★½	Howard Bailey Securities	\$250 Million - \$500 Million	30%-40%	Fort Wayne	Indiana
★★★★½	Solomon API	\$250 Million - \$500 Million	upto 5%	Rockledge	Florida
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Spectrum Investment Advisors	Million - \$1 Billion	20%-30%	Mequon	Wisconsin

★★★★½	Benjamin F. Edwards Wealth Management	\$500 Million - \$1 Billion	20%-30%	St. Louis	Missouri
★★★★½	Carnegie Wealth Management	\$250 Million - \$500 Million	20%-30%	Berwyn	Pennsylvania
★★★★½	Consolidated Portfolio Review Corp	\$500 Million - \$1 Billion	30%-40%	Woodbury	New York
★★★★½	Front Row Advisors	\$250 Million - \$500 Million	10%-20%	Tiburon	California
★★★★½	Iron Gate Global Advisors	\$500 Million - \$1 Billion	30%-40%	North Salt Lake	Utah
★★★★½	Flagship Wealth Advisors	\$250 Million - \$500 Million	20%-30%	Wakefield	Massachusetts
★★★★½	Morling Financial Advisors	\$500 Million - \$1 Billion	20%-30%	Fremont	California
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Wright Investors Service Inc.	\$1 Billion -	upto 5%	Shelton	Connecticut

		\$5 Billion			
★★★★½	Archer Investment Corporation	\$500 Million - \$1 Billion	10%-20%	Carmel	Indiana
★★★★½	Bright Futures Wealth Management	\$250 Million - \$500 Million	20%-30%	Webster	New York
★★★★½	LNW Wealth Management	\$1 Billion - \$5 Billion	20%-30%	Seattle	Washington
★★★★½	Stairway Partners	\$1 Billion - \$5 Billion	20%-30%	Chicago	Illinois
★★★★½	Peddock Capital Advisors	\$500 Million - \$1 Billion	10%-20%	Braintree	Massachusetts
★★★★½	Elwood & Goetz Wealth Advisory Group	\$500 Million - \$1 Billion	20%-30%	Athens	Georgia
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
	ADVISORS	\$10 Billion			

★★★★½	New World Advisors	\$500 Million - \$1 Billion	10%-20%	Hingham	Massachusetts
★★★★½	LifInvest Wealth Management	\$250 Million - \$500 Million	upto 5%	Miami	Florida
★★★★½	Piedmont Capital Management	\$250 Million - \$500 Million	20%-30%	Greensboro	North Carolina
★★★★½	Insight Folios	\$250 Million - \$500 Million	20%-30%	Charlotte	North Carolina
★★★★½	Syon Capital	\$1 Billion - \$5 Billion	-	San Francisco	California
★★★★½	Vernal Point Advisors	\$1 Billion - \$5 Billion	10%-20%	San Francisco	California
★★★★½	Highland Financial	\$250 Million - \$500	10%-20%	Wayne	New Jersey
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★½	Oakridge Management Group	\$1 Billion -	-	Darien	Connecticut

		\$5 Billion			
★★★★½	Drive Wealth Advisers	\$1 Billion - \$5 Billion	30%-40%	Lehi	Utah
★★★★½	Lyell Wealth Management	\$1 Billion - \$5 Billion	20%-30%	Menlo Park	California
★★★★½	Ceeto Capital Group	\$250 Million - \$500 Million	10%-20%	Coral Gables	Florida
★★★★½	Full Sail Capital	\$1 Billion - \$5 Billion	20%-30%	Oklahoma City	Oklahoma
★★★★½	CWM	over \$10 Billion	20%-30%	Omaha	Nebraska
★★★★½	Choate Investment Advisors	\$5 Billion - \$10 Billion	10%-20%	Boston	Massachusetts
		\$1 Billion			
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
	Management	\$1 Billion			
★★★★½	McQueen Financial	over \$10	20%-30%	Clawson	Michigan

	Advisors II	Billion			
★★★★½	Thurston Springer Advisors	\$1 Billion - \$5 Billion	10%-20%	Indianapolis	Indiana
★★★★½	ORBA Wealth Advisors	\$250 Million - \$500 Million	-	Chicago	Illinois
★★★★	Jacobson & Schmitt Advisors	\$250 Million - \$500 Million	10%-20%	Middleton	Wisconsin
★★★★	WMG Financial Advisors	\$500 Million - \$1 Billion	30%-40%	Knoxville	Tennessee
★★★★	Nations Financial Group	\$1 Billion - \$5 Billion	20%-30%	Cedar Rapids	Iowa
★★★★	SFI Advisors	up to \$100 Million	10%-20%	Montclair	New Jersey
★★★★	RIP Wealth	\$1 Billion - \$1 Billion	20%-30%	Atlanta	Georgia
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
		Million			

★★★★★	Endowment Wealth Management	\$250 Million - \$500 Million	10%-20%	Appleton	Wisconsin
★★★★★	Oakwell Private Wealth Management	\$250 Million - \$500 Million	20%-30%	Austin	Texas
★★★★★	Sellwood Consulting	\$1 Billion - \$5 Billion	30%-40%	Portland	Oregon
★★★★★	Harbor Advisory Corporation	\$250 Million - \$500 Million	20%-30%	Portsmouth	New Hampshire
★★★★★	Johnson Financial Group	\$1 Billion - \$5 Billion	20%-30%	Denver	Colorado
★★★★★	Advocacy Wealth Management	\$1 Billion - \$5 Billion	20%-30%	Atlanta	Georgia
★★★★★	Pacific Point Advisors	up to \$100 Million	-	Rancho Santa Fe	California
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	EGI Financial	\$250 Million - \$500 Million	10%-20%	Akron	Ohio

★★★★★	Crumly and Associates	\$500 Million - \$1 Billion	30%-40%	Springfield	Illinois
★★★★★	Midwest Capital Advisors	\$500 Million - \$1 Billion	20%-30%	Grand Rapids	Michigan
★★★★★	Black Swift Group	\$250 Million - \$500 Million	10%-20%	Boulder	Colorado
★★★★★	Parallel Advisors	\$5 Billion - \$10 Billion	20%-30%	San Francisco	California
★★★★★	Petros Family Wealth	up to \$100 Million	-	Bloomington	Minnesota
★★★★★	Olympus Wealth Management	\$500 Million - \$1 Billion	30%-40%	Cottonwood Heights	Utah
★★★★★	Golden Reserve Retirement	up to \$100 Million	-	Dublin	Ohio
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Strategic Investment Advisors	Million - \$1 Billion	30%-40%	Livonia	Michigan

★★★★★	MD Financial / Vestment Financial	up to \$100 Million	30%-40%	Chanhassen	Minnesota
★★★★★	Black Diamond Financial	\$500 Million - \$1 Billion	10%-20%	Towson	Maryland
★★★★★	Capita Financial Network	\$1 Billion - \$5 Billion	30%-40%	Sandy	Utah
★★★★★	Sandbox Financial Partners	\$250 Million - \$500 Million	30%-40%	Bethesda	Maryland
★★★★★	Global Financial Private Client	\$500 Million - \$1 Billion	10%-20%	Sarasota	Florida
★★★★★	Credit Capital Investments	up to \$100 Million	upto 5%	Livingston	New Jersey
★★★★★	Intrepid Capital Management	\$500 Million - \$1 Billion	5%-10%	Jacksonville Beach	Florida
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Oarsman Capital	Million - \$1 Billion	5%-10%	Milwaukee	Wisconsin

★★★★★	Halter Ferguson Financial	\$250 Million - \$500 Million	20%-30%	Carmel	Indiana
★★★★★	Andersen	\$1 Billion - \$5 Billion	20%-30%	McLean	Virginia
★★★★★	ThirtyNorth Investments	\$250 Million - \$500 Million	10%-20%	New Orleans	Louisiana
★★★★★	MV Capital Management	\$1 Billion - \$5 Billion	10%-20%	Bethesda	Maryland
★★★★★	Campbell Wealth Management	\$1 Billion - \$5 Billion	20%-30%	Alexandria	Virginia
★★★★★	Park Capital Management	\$250 Million - \$500 Million	20%-30%	Madison	Wisconsin
★★★★★	Aljian Capital Management	\$250 Million - \$500	20%-30%	Carson City	Nevada
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	G2 Capital Management	\$500 Million - \$1 Billion	20%-30%	Columbus	Ohio

★★★★★	Meridian Wealth Advisors	\$1 Billion - \$5 Billion	20%-30%	Austin	Texas
★★★★★	Axia Advisory Corp	\$1 Billion - \$5 Billion	5%-10%	Indianapolis	Indiana
★★★★★	Vawter Financial	\$250 Million - \$500 Million	10%-20%	Columbus	Ohio
★★★★★	Total Wealth Planning	\$1 Billion - \$5 Billion	10%-20%	Cincinnati	Ohio
★★★★★	Requisite Capital Management	\$1 Billion - \$5 Billion	10%-20%	Dallas	Texas
★★★★★	Heritage Financial	\$250 Million - \$500 Million	20%-30%	Gainesville	Virginia
★★★★★	Fortitude Family Office	\$500 Million - \$1 Billion	-	Scottsdale	Arizona
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Bay Colony Advisory Group	\$1 Billion - \$5 Billion	20%-30%	Concord	Massachusetts

★★★★★	Aton Financial	\$250 Million - \$500 Million	10%-20%	San Juan	Puerto Rico
★★★★★	Windrock Wealth Management	\$250 Million - \$500 Million	20%-30%	Naperville	Illinois
★★★★★	Drake & Associates	\$250 Million - \$500 Million	20%-30%	Waukesha	Wisconsin
★★★★★	Lexaurum Advisors	\$500 Million - \$1 Billion	10%-20%	Overland Park	Kansas
★★★★★	Vestor Capital	\$1 Billion - \$5 Billion	10%-20%	Chicago	Illinois
★★★★★	Knights of Columbus Asset Advisors	over \$10 Billion	upto 5%	New Haven	Connecticut
★★★★★	Watts Gwilliam & Company	\$500 Million - \$1 Billion	10%-20%	Gilbert	Arizona
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Sgtor wealth Advisory Group	Million - \$1 Billion	20%-30%	West Seneca	New York

★★★★★	Providence Capital Advisors	\$500 Million - \$1 Billion	20%-30%	Charlotte	North Carolina
★★★★★	Sterling Wealth Management	\$250 Million - \$500 Million	20%-30%	Champaign	Illinois
★★★★★	Benefit Financial Services Group	\$1 Billion - \$5 Billion	20%-30%	Irvine	California
★★★★★	Paradiem	\$250 Million - \$500 Million	10%-20%	Covington	Louisiana
★★★★★	Acima Private Wealth	\$250 Million - \$500 Million	10%-20%	Richmond	Virginia
★★★★★	Potomac Fund Management, Inc.	\$1 Billion - \$5 Billion	50%-60%	Miami	Florida
★★★★★	The Pinnacle Financial	\$1 Billion - \$5 Billion	20%-30%	Rockville Centre	New York
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Hixon Zuercher Capital Management	\$250 Million -	20%-30%	Findlay	Ohio

		\$500 Million			
★★★★★	Petra Financial Advisors Inc.	\$250 Million - \$500 Million	20%-30%	Colorado Springs	Colorado
★★★★★	Meadow Creek Wealth Advisors	\$500 Million - \$1 Billion	20%-30%	Atlanta	Georgia
★★★★★	Proprietary Capital	\$1 Billion - \$5 Billion	20%-30%	Denver	Colorado
★★★★★	Hardy Reed	\$1 Billion - \$5 Billion	10%-20%	Tupelo	Mississippi
★★★★★	Greenspring Advisors	\$5 Billion - \$10 Billion	10%-20%	Towson	Maryland
★★★★★	Rocky Mountain Advisers	\$1 Billion - \$5 Billion	10%-20%	Salina	Kansas
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
	Strategists	\$5 Billion			

★★★★★	Dew Wealth Management	\$250 Million - \$500 Million	10%-20%	Scottsdale	Arizona
★★★★★	Sendero Wealth Management	\$5 Billion - \$10 Billion	20%-30%	San Antonio	Texas
★★★★★	Forvis Mazars Wealth Advisors	\$5 Billion - \$10 Billion	20%-30%	Springfield	Missouri
★★★★★	Brooklyn Fi	up to \$100 Million	-	Brooklyn	New York
★★★★★	Everest Financial Group	\$500 Million - \$1 Billion	20%-30%	Minneapolis	Minnesota
★★★★★	Legacy Advisors	\$1 Billion - \$5 Billion	10%-20%	Plymouth Meeting	Pennsylvania
★★★★★	Traction Financial Partners	up to \$100 Million	-	Encampment	Wyoming
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Empirical Asset Management	Million - \$500 Million	20%-30%	Wellesley	Massachusetts

★★★★★	Cahaba Wealth Management	\$1 Billion - \$5 Billion	20%-30%	Atlanta	Georgia
★★★★★	Mainsail Financial Group	up to \$100 Million	-	Bellevue	Washington
★★★★★	Provenance Wealth Advisors	\$1 Billion - \$5 Billion	40%-50%	Fort Lauderdale	Florida
★★★★★	Schechter Investment Advisors	\$1 Billion - \$5 Billion	30%-40%	Birmingham	Michigan
★★★★★	Patton Albertson Miller Group	\$1 Billion - \$5 Billion	20%-30%	Chattanooga	Tennessee
★★★★★	Morton Brown Family Wealth	\$250 Million - \$500 Million	20%-30%	Allentown	Pennsylvania
★★★★★	Cypress Financial Planning	\$250 Million - \$500 Million	20%-30%	Haddon Heights	New Jersey
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Ryan Wealth Management	\$250 Million - \$500 Million	20%-30%	Yuba City	California

★★★★★	Grassi Investment Management	\$1 Billion - \$5 Billion	5%-10%	Santa Clara	California
★★★★★	The Investment Counsel Company of Nevada	\$1 Billion - \$5 Billion	10%-20%	Las Vegas	Nevada
★★★★★	O'Shaughnessy Asset Management	\$5 Billion - \$10 Billion	5%-10%	Stamford	Connecticut
★★★★★	Ellsworth Advisors	\$500 Million - \$1 Billion	10%-20%	Hudson	Ohio
★★★★★	MtM Financial Group	\$250 Million - \$500 Million	10%-20%	Bethlehem	Pennsylvania
★★★★★	Elgethun Capital Management	\$500 Million - \$1 Billion	10%-20%	Sioux Falls	South Dakota
★★★★★	Haven Wealth	\$250 Million - \$500 Million	10%-20%	Washington	Texas
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	4J Wealth Management	up to \$100 Billion	10%-20%	Alexandria	Virginia

		Million			
★★★★★	Founders Financial Alliance	\$500 Million - \$1 Billion	20%-30%	Raleigh	North Carolina
★★★★★	Post Resch Tallon Group	\$250 Million - \$500 Million	10%-20%	Pittsford	New York
★★★★★	Independent Advisor Alliance	over \$10 Billion	20%-30%	Charlotte	North Carolina
★★★★★	Charter Wealth Management	up to \$100 Million	-	Raleigh	North Carolina
★★★★★	Valeo Financial Advisors	\$5 Billion - \$10 Billion	10%-20%	Carmel	Indiana
★★★★★	Marietta Wealth Management	\$1 Billion - \$5 Billion	10%-20%	Marietta	Georgia
★★★★★	Seven Springs Wealth Group	\$500 Million - \$1 Billion	10%-20%	Brentwood	Tennessee
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State

★★★★★	Mendota Financial Group	\$250 Million - \$500 Million	10%-20%	Madison	Wisconsin
★★★★★	Argus Investors' Counsel	up to \$100 Million	-	New York	New York
★★★★★	Penobscot Investment Management Company	\$1 Billion - \$5 Billion	10%-20%	Boston	Massachusetts
★★★★★	O'Boyle Wealth Management	\$250 Million - \$500 Million	20%-30%	Beverly Hills	California
★★★★★	Baker Avenue Asset Management	\$1 Billion - \$5 Billion	10%-20%	San Francisco	California
★★★★★	Riverview Capital Advisers	\$500 Million - \$1 Billion	20%-30%	Boston	Massachusetts
★★★★★	Aspen Grove Capital	\$5 Billion - \$10 Billion	10%-20%	Avon	Colorado
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Continuum Advisory	\$1 Billion - \$5 Billion	20%-30%	Eagle	Idaho

★★★★★	Pine Ridge Advisers	\$1 Billion - \$5 Billion	30%-40%	New York	New York
★★★★★	Verde Capital Management	\$500 Million - \$1 Billion	10%-20%	Clarkston	Michigan
★★★★★	Colton Groome Financial Advisors	\$250 Million - \$500 Million	20%-30%	Asheville	North Carolina
★★★★★	Epiq Capital Group	\$1 Billion - \$5 Billion	20%-30%	San Francisco	California
★★★★★	Trail Ridge Investment Advisors	up to \$100 Million	10%-20%	Fort Collins	Colorado
★★★★★	Novapoint Capital	\$250 Million - \$500 Million	20%-30%	Atlanta	Georgia
★★★★★	Better Money Decisions	\$250 Million - \$500 Million	10%-20%	Santa Fe	New Mexico
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Silverlake Wealth Management	Million - \$500 Million	20%-30%	Williston	Vermont

★★★★★	Alpha Architect	\$500 Million - \$1 Billion	5%-10%	Havertown	Pennsylvania
★★★★★	Bogart Wealth	\$1 Billion - \$5 Billion	20%-30%	McLean	Virginia
★★★★★	Shayne & Jacobs	\$250 Million - \$500 Million	10%-20%	Nashville	Tennessee
★★★★★	NFP Retirement	over \$10 Billion	10%-20%	Aliso Viejo	California
★★★★★	Vizcaya Capital	\$250 Million - \$500 Million	-	Miami	Florida
★★★★★	Ranch Capital Advisors	\$250 Million - \$500 Million	20%-30%	Sarasota	Florida
★★★★★	Investment Partners Asset Management	up to \$100 Million	10%-20%	Metuchen	New Jersey
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Adams Wealth Management	Million - \$1 Billion	20%-30%	Logan	Utah

★★★★★	Bridges Investment Management Inc.	\$5 Billion - \$10 Billion	10%-20%	Omaha	Nebraska
★★★★★	Independent Wealth Network	\$250 Million - \$500 Million	10%-20%	Urbandale	Iowa
★★★★★	DAI Wealth	up to \$100 Million	upto 5%	Atlanta	Georgia
★★★★★	Wealthcare Investment Partners	\$500 Million - \$1 Billion	30%-40%	Portsmouth	Rhode Island
★★★★★	The Gleason Group	\$500 Million - \$1 Billion	20%-30%	Prospect	Kentucky
★★★★★	Sharper & Granite	\$250 Million - \$500 Million	10%-20%	El Segundo	California
★★★★★	Alaska Wealth Advisors	\$500 Million - \$1 Billion	10%-20%	Anchorage	Alaska
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Breed's Hill Capital	Billion - \$5 Billion	20%-30%	Boston	Massachusetts

★★★★★	Rose Capital Advisors	\$500 Million - \$1 Billion	10%-20%	Miami Beach	Florida
★★★★★	Cassady Schiller Wealth Management	\$500 Million - \$1 Billion	10%-20%	Cincinnati	Ohio
★★★★★	Frazier Financial Advisors	\$500 Million - \$1 Billion	10%-20%	Columbus	Ohio
★★★★★	CX Institutional	\$1 Billion - \$5 Billion	30%-40%	Auburn	Indiana
★★★★★	Federmann Financial Advisors	up to \$100 Million	10%-20%	Rocky Point	New York
★★★★★	Millennium Advisory Services	\$500 Million - \$1 Billion	20%-30%	Glen Allen	Virginia
★★★★★	Gilbert & Cook	\$1 Billion - \$5 Billion	20%-30%	West Des Moines	Iowa
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Kohmann Bosshard Financial Services	\$500 Million - \$1 Billion	20%-30%	Akron	Ohio

★★★★★	BLVD Private Wealth, LLC	up to \$100 Million	-	Prospect	Kentucky
★★★★★	SWMG	up to \$100 Million	10%-20%	Fort Worth	Texas
★★★★★	Clark Asset Management	\$250 Million - \$500 Million	-	Portsmouth	New Hampshire
★★★★★	Perennial Advisors	\$500 Million - \$1 Billion	10%-20%	New York	New York
★★★★★	AAF Wealth Management	\$500 Million - \$1 Billion	10%-20%	Westborough	Massachusetts
★★★★★	Collaborative Wealth Management	\$250 Million - \$500 Million	10%-20%	Lake Mary	Florida
★★★★★	Fairbanks Capital Management	\$250 Million - \$500 Million	10%-20%	Rancho Santa Fe	California
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Washington Financial Advisors	Billion - \$5 Billion	20%-30%	Columbia	Maryland

★★★★★	Mowery & Schoenfeld Wealth Management	\$250 Million - \$500 Million	-	Lincolnshire	Illinois
★★★★★	Howard Financial Services	\$1 Billion - \$5 Billion	10%-20%	Dallas	Texas
★★★★★	New Republic Capital	\$1 Billion - \$5 Billion	-	Charlotte	North Carolina
★★★★★	Core Wealth Advisors	\$500 Million - \$1 Billion	10%-20%	Lakeland	Florida
★★★★★	Dock Street Asset Management, Inc.	\$500 Million - \$1 Billion	10%-20%	Palm Beach	Florida
★★★★★	Blue Water Wealth	\$250 Million - \$500 Million	10%-20%	Portland	Oregon
★★★★★	Carmichael Hill & Associates	\$250 Million - \$500	10%-20%	Gaithersburg	Maryland
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Schwartz & Co.	\$5 Billion -	10%-20%	Bloomfield Hills	Michigan

		\$10 Billion			
★★★★★	Peninsula Wealth	\$500 Million - \$1 Billion	10%-20%	San Francisco	California
★★★★★	Iron Horse Wealth Management	\$250 Million - \$500 Million	20%-30%	Johnston	Iowa
★★★★★	Crewe Advisors	\$1 Billion - \$5 Billion	10%-20%	Salt Lake City	Utah
★★★★★	Regent Peak Wealth Advisors	\$500 Million - \$1 Billion	20%-30%	Atlanta	Georgia
★★★★★	Narwhal Capital Management	\$1 Billion - \$5 Billion	10%-20%	Marietta	Georgia
★★★★★	Formidable Asset Management	\$500 Million - \$1 Billion	10%-20%	Cincinnati	Ohio
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Asset Management	\$1 Billion - \$5 Billion	-	Omaha	Nebraska

★★★★★	Broyhill Asset Management	up to \$100 Million	-	Charlotte	North Carolina
★★★★★	IHT Wealth Management	\$1 Billion - \$5 Billion	30%-40%	Chicago	Illinois
★★★★★	Denver PWM	\$500 Million - \$1 Billion	10%-20%	Denver	Colorado
★★★★★	Laidlaw Wealth Management	\$500 Million - \$1 Billion	30%-40%	New York	New York
★★★★★	Regatta Capital Group	\$1 Billion - \$5 Billion	20%-30%	El Segundo	California
★★★★★	Francis Financial	\$500 Million - \$1 Billion	10%-20%	New York	New York
★★★★★	Signify Wealth	up to \$100 Million	10%-20%	St. Louis	Missouri
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Teamwork Financial Advisors	Million - \$1 Billion	30%-40%	San Antonio	Texas

★★★★★	Clear Creek Advisors	\$250 Million - \$500 Million	20%-30%	Denver	Colorado
★★★★★	Allied Investment Advisors	\$500 Million - \$1 Billion	20%-30%	Billings	Montana
★★★★★	Luken Investment Analytics	up to \$100 Million	10%-20%	Brentwood	Tennessee
★★★★★	Wealthstream Advisors	\$1 Billion - \$5 Billion	10%-20%	New York	New York
★★★★★	Pinnacle Wealth Advisors	\$500 Million - \$1 Billion	20%-30%	Nashville	Tennessee
★★★★★	Mengis Capital Management	\$500 Million - \$1 Billion	20%-30%	Portland	Oregon
★★★★★	Grey Rock Asset Management	\$250 Million - \$500 Million	-	Dallas	Texas
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Kings Path Partners	\$1 Billion - \$5 Billion	10%-20%	Sugar Land	Texas

★★★★★	Sax Wealth Advisors	\$1 Billion - \$5 Billion	10%-20%	Parsippany	New Jersey
★★★★★	Naples Global Advisors	\$1 Billion - \$5 Billion	10%-20%	Naples	Florida
★★★★★	Quadcap Wealth Management	\$500 Million - \$1 Billion	10%-20%	Frisco	Texas
★★★★★	Capitol Private Wealth Group	\$250 Million - \$500 Million	10%-20%	Vienna	Virginia
★★★★★	Livlife Capital Partners	\$250 Million - \$500 Million	10%-20%	Southborough	Massachusetts
★★★★★	IMA Financial Group	\$500 Million - \$1 Billion	10%-20%	Wichita	Kansas
★★★★★	Fortitude Advisory	\$250 Million - \$500	20%-30%	Gig Harbor	Washington
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
★★★★★	Hoey Investments	\$250 Million -	20%-30%	Coatesville	Pennsylvania

		\$500 Million			
★★★★★	Lifestyle Asset Management	\$250 Million - \$500 Million	10%-20%	Friendswood	Texas
★★★★★	Boyd Wealth Management	\$250 Million - \$500 Million	20%-30%	Sacramento	California
★★★★★	TVAMP	\$500 Million - \$1 Billion	20%-30%	Knoxville	Tennessee
★★★★★	Evolution Advisers	up to \$100 Million	5%-10%	Richmond	Virginia
★★★★★	ACAS LLC	\$250 Million - \$500 Million	10%-20%	Rancho Santa Fe	California
★★★★★	Boulay Financial Advisors	\$1 Billion - \$5 Billion	20%-30%	Eden Prairie	Minnesota
	N.F.W.	\$1 Billion - \$5 Billion			
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
	Management Corp.	\$10 Billion			

★★★★★	Onyx Bridge Wealth Group	\$500 Million - \$1 Billion	-	Tarrytown	New York
★★★★★	American Capital Advisory	up to \$100 Million	10%-20%	Ketchum	Idaho
★★★★★	NWK Group	\$500 Million - \$1 Billion	20%-30%	San Francisco	California
★★★★★	Shakespeare Wealth Management	\$250 Million - \$500 Million	10%-20%	Pewaukee	Wisconsin
★★★★★	Legacy Financial Strategies	\$500 Million - \$1 Billion	10%-20%	Overland Park	Kansas
★★★★★	Choreo	over \$10 Billion	20%-30%	Rockford	Illinois
★★★★★	Stratos Wealth Partners	over \$10 Billion	10%-20%	Beachwood	Ohio
		\$250			
Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
	Group	Million			

METHODOLOGY

Plant-A Insights Group and **Newsweek** have partnered to identify **America's Top Financial Advisory Firms 2025**. We analyzed over 15,000 Financial advisories registered with the SEC, and then applied the following methodology to identify the best of the best.

We began by shortlisting firms with **more than \$20 million assets under management (AUM)**, a minimum of **3 wealth advisors**, at least **5 individual clients**, and **at least two years of SEC registration**. Firms were also screened for clean disciplinary records and availability of portfolio management services to individual investors. These shortlisted firms were then analyzed and scored based on the following factors:

- **Asset Performance:** Growth in assets under management indicates both financial performance and the health of a firm's client base, the cornerstones of advisory excellence. We include both short-term (Sept 2024 vs Sept 2023) and long-term (CAGR Sept 2019 to Sept 2024) measures of asset growth in our scoring model.
- **Client Performance:** Great advisories retain their clients and attract new ones. We again include both short and long-term measures of client base growth/shrinkage for short term (Sept 2024 vs Sept 2023) and long term (CAGR Sept 2019 to Sept 2024).
- **Adviser Expertise and Client Ratio:** We include measures that capture the credentialed expertise of each firm as well as their client-to-adviser ratio.
- **Breadth of service offerings:** Great firms offer a bundle of related services for their investors. We considered the number of other wealth advisory services in our scoring model, such as financial planning services and pension consulting services.
- **Conflicts of interests:** The best advisories work to prevent conflicts of interest; firms with conflicts of interests are penalized in the scoring model.

We calculate a score for each firm. The **top 750 Financial Advisory Firms** have been recognized as **America's Top Financial Advisory Firms 2025**. The performance of

Star Rating	Name	Total AUM Range - Sep 2024	AUM CAGR over 5 years*	Main Office City	Main Office State
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publicly available data sources from the time period in question. Newsweek and Plant-A Insights make no claim to the completeness of the firms examined.

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The Rankings are generated from Investment Adviser Information Reports data sourced from SEC for the month of September 2024. They are inherently a reflection of historical data and may not include subsequent developments, unforeseen events, or additional data not covered during the research period. The results of this ranking should not be used as sole source of information for future deliberation. The information provides through this list should rather be considered in conjunction with other available information about the financial advisory firm. The quality of financial advisory firms that are not included in the ranking is not disputed.

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