

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 Advisors, 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	✓	✓	✓	✓	GenTrust Wealth Management	Miami		✓	✓	✓	✓
Dixon Financial Services, Inc	Lafayette	✓	✓	✓	✓	Global Financial Private Capital, LLC	Sarasota	✓	✓	✓	✓	
Dowling & Yahnke, LLC	San Diego		✓	✓	✓	Heritage Investment Group, Inc	Pompano Beach	✓	✓	✓	✓	
Efficient Market Advisors	San Diego	✓	✓	✓	✓	ProVise Management Group, LLC	Clearwater	✓	✓	✓	✓	
First Foundation	Irvine		✓	✓	✓	Resource Consulting Group	Orlando	✓	✓	✓	✓	
First Republic Investment Management, Inc	San Francisco	✓	✓	✓	✓		Coral Gables	✓	✓	✓	✓	
Gamble Jones Investment Counsel	Pasadena	✓	✓	✓	✓	WaterOak Advisors	Winter Park	✓	✓	✓	✓	
Gemmer Asset Management, LLC	Walnut Creek	✓	✓	✓	✓	WE Family Offices	Miami			✓		
Genovese Burford & Brothers	Sacramento	✓	✓	✓	✓							
Golub Group	San Mateo		✓	✓		GEORGIA						
Halbert Hargrove Global Advisors	Long Beach		✓	✓	✓	A. Montag & Associates	Atlanta		✓	✓	✓	✓
Hanson McClain Advisors	Sacramento	✓	✓	✓	✓	Atlanta Capital Group	Atlanta	✓	✓	✓	✓	✓
HighTower Advisors	Menlo Park		✓	✓		Atlantic Trust	Atlanta		✓	✓	✓	
HoyleCohen, LLC	San Diego	✓	✓	✓	✓	Balentine	Atlanta		✓	✓	✓	
KCM Investment Advisors, LLC	San Rafael	✓	✓	✓	✓	Berman Capital Advisors, LLC	Atlanta		✓	✓	✓	✓
Mission Wealth Management, LLC	Santa Barbara	✓	✓	✓	✓	Brightworth	Atlanta	✓	✓	✓	✓	✓
Morton Capital Management	Calabasas	✓	✓	✓	✓	Capital Directions, LLC	Atlanta	✓	✓	✓	✓	✓
Nelson Roberts Investment Advisors	East Palo Alto		✓	✓	✓	Capital Investment Advisors	Atlanta	✓	✓			
Osborne Partners Capital Management, LLC	San Francisco		✓	✓	✓	Homrich Berg	Atlanta	✓	✓	✓	✓	
Parallel Advisors	San Francisco	✓	✓	✓	✓	SignatureFD, LLC	Atlanta	✓	✓	✓	✓	
Personal Capital	Redwood City	✓	✓			Smith & Howard Wealth Management	Atlanta	✓	✓	✓	✓	✓
Pillar Pacific Capital Management, LLC	Pacifica	✓	✓	✓	✓	Southeast Asset Advisors, Inc	Thomasville		✓	✓	✓	✓
Polaris Wealth Advisers, LLC	San Rafael	✓	✓	✓	✓	Willis Investment Counsel	Gainesville		✓	✓	✓	
Private Ocean	San Rafael	✓	✓	✓	✓							
Pure Financial Advisors, Inc	San Diego	✓	✓	✓		HAWAII						
Raub Brock Capital Management	Larkspur	✓	✓	✓	✓	CKW Financial Group	Honolulu	✓	✓	✓	✓	
RS Crum Inc	Newport Beach	✓	✓									
Sand Hill Global Advisors	Palo Alto		✓	✓	✓	ILLINOIS						
Saratoga Research & Investment Management	Saratoga	✓	✓	✓	✓	Altair Advisers, LLC	Chicago			✓	✓	
Savant Investment Group	San Francisco	✓	✓	✓	✓	Balasa Dinverno Foltz, LLC	Itasca			✓	✓	✓
Scharf Investments, LLC	Scotts Valley	✓	✓	✓	✓	Brookstone Capital Management	Wheaton	✓	✓			
Schnieders Capital Management, LLC	Pasadena	✓	✓	✓	✓	Brownson, Rehmus & Foxworth	Chicago			✓	✓	✓
Sitrin Capital Portfolio Management	Century City	✓	✓		✓	Cedar Hill Associates, LLC	Chicago			✓	✓	✓
The Advisory Group of San Francisco, LLC	San Francisco	✓	✓	✓	✓	Chicago Partners Wealth Advisors	Chicago	✓	✓	✓	✓	✓
The Presidio Group	San Francisco		✓	✓	✓	Cozad Asset Management, Inc	Champaign	✓	✓	✓	✓	
United Capital Financial Advisers, LLC	Newport Beach	✓	✓	✓	✓	HighPoint Advisor Group	Downers Grove	✓	✓	✓	✓	✓
Van Hulzen Asset Management, LLC	El Dorado Hills	✓	✓	✓	✓	HighTower Advisors - The Lerner Group	Chicago	✓	✓	✓	✓	✓
Violich Capital Management	San Francisco	✓	✓	✓	✓	IPI Wealth Management, Inc	Decatur	✓	✓	✓	✓	✓
Willow Creek Wealth Management, Inc	Sebastopol	✓	✓	✓	✓	JMG Financial Group, Ltd	Oak Brook			✓	✓	
Yeske Buie	San Francisco	✓	✓	✓		Romano Wealth Management	Evanston	✓	✓	✓	✓	
						Savant Capital, LLC	Rockford	✓	✓	✓	✓	✓
COLORADO						Stairway Partners, LLC	Chicago			✓	✓	✓
BRC Investment Management, LLC	Greenwood Village	✓	✓		✓	Strategic Wealth Partners, LLC	Deerfield	✓	✓	✓	✓	✓
Janiczek Wealth Management	Greenwood Village		✓	✓		Whitnell	Oak Brook		✓	✓		
Wagner Wealth Management	Denver	✓	✓	✓	✓							
						INDIANA						
CONNECTICUT						Column Capital	Indianapolis	✓	✓	✓	✓	✓
Bradley, Foster & Sargent, Inc	Hartford	✓	✓	✓	✓	Donaldson Capital Management, LLC	Evansville	✓	✓	✓	✓	✓
Connecticut Wealth Management, LLC	Farmington		✓	✓	✓	Valeo Financial Advisors	Indianapolis	✓	✓	✓	✓	✓
LLBH Private Wealth Management, LLC	Westport	✓	✓	✓	✓							
NorthCoast Asset Management	Greenwich	✓	✓	✓	✓	IOWA						
Relyea Zuckerberg Hanson, LLC	Stamford		✓	✓		World Trend Financial	Cedar Rapids	✓	✓	✓		
DISTRICT OF COLUMBIA						KANSAS						
Avenir Corporation	Washington		✓	✓	✓	Creative Planning, Inc	Leawood	✓	✓	✓	✓	✓
Farr, Miller & Washington, LLC	Washington	✓	✓	✓	✓	Stepp & Rothwell, Inc	Overland Park	✓	✓	✓	✓	
						Sunrise Advisors	Leawood	✓	✓	✓	✓	✓
FLORIDA												
ARS Wealth Advisors	St. Petersburg	✓	✓	✓		KENTUCKY						
Botf-Anderson Partners, Inc	Jacksonville		✓	✓	✓	ARGI Investment Services, LLC	Louisville	✓	✓	✓		
CPS Investment Advisors	Lakeland	✓	✓		✓	MCF Advisors	Covington	✓	✓	✓	✓	✓
Cumberland Advisors	Sarasota	✓	✓	✓	✓	Parthenon LLC	Louisville	✓	✓	✓	✓	✓
CV Advisors, LLC	Aventura			✓	✓							
Evensky & Katz / Foldes Financial Wealth Management	Coral Gables	✓	✓	✓	✓	LOUISIANA						
Finser International Corporation, Inc	Miami	✓	✓	✓		Resource Management, LLC	Metairie	✓	✓	✓		

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MARYLAND						NEW JERSEY					
Baltimore Washington Financial Advisors	Columbia	✓	✓	✓	✓	Advisors Capital Management, LLC	Ridgewood	✓	✓		✓
FBB Capital Partners	Bethesda	✓	✓	✓	✓	CFS Investment Advisory Services, LLC	Totowa	✓	✓	✓	✓
Greenspring Wealth Management	Towson	✓	✓	✓	✓	Circle Wealth Management, LLC	Summit		✓	✓	✓
Heritage Investors Management	Bethesda	✓	✓	✓	✓	Condor Capital Management	Martinsville	✓	✓	✓	✓
Wagner Bowman Management Corp	Baltimore	✓	✓	✓	✓	Lassus Wherley	New Providence	✓	✓	✓	✓
WMS Partners, LLC	Towson		✓	✓		Massey Quick & Co. LLC	Morristown		✓	✓	✓
MASSACHUSETTS						Meyer Capital Group	Marlton	✓	✓	✓	✓
Adviser Investments	Newton	✓	✓			Modera Wealth Management, LLC	Westwood	✓	✓	✓	✓
Athena Capital Advisors, LLC	Lincoln			✓	✓	Private Advisor Group, LLC	Morristown	✓	✓	✓	✓
Atlas Private Wealth Management, LLC	North Adams	✓	✓			RegentAtlantic	Morristown	✓	✓	✓	✓
Aureus Asset Management	Boston		✓	✓	✓	NEW MEXICO					
Ballentine Partners, LLC	Waltham	✓	✓	✓		REDW Stanley Financial Advisors, LLC	Albuquerque	✓	✓	✓	✓
Breckinridge Capital Advisors, Inc	Boston	✓	✓	✓	✓	NEW YORK					
Choate Investment Advisors	Boston		✓	✓	✓	Altfest Personal Wealth Management	New York	✓	✓	✓	
Congress Wealth Management, LLC	Boston	✓	✓	✓	✓	Barrett Asset Management, LLC	New York		✓	✓	
Grimes & Company, Inc	Westborough	✓	✓	✓		Betterment	New York	✓	✓		
Montis Financial, LLC	Waltham	✓	✓	✓		Bruderman Brothers, LLC	Suffern	✓	✓		
North American Management Corp	Boston		✓	✓	✓	Capital Management Group of New York	New York	✓	✓		✓
SCS Financial	Boston			✓	✓	City National Rochdale	New York	✓	✓	✓	✓
TFC Financial Management, Inc	Boston	✓	✓	✓		Clear Harbor Asset Management, LLC	New York	✓	✓	✓	✓
The Colony Group	Boston	✓	✓	✓	✓	Constellation Wealth Advisors, LLC	New York			✓	✓
Welch & Forbes LLC	Boston	✓	✓	✓	✓	Courier Capital Corporation	Buffalo	✓	✓	✓	✓
Wellesley Investment Advisors, Inc	Wellesley	✓	✓	✓	✓	Dynasty Wealth Management, LLC	New York		✓	✓	
Wilkins Investment Counsel, Inc	Boston		✓	✓	✓	Evercore Wealth Management, LLC	New York		✓	✓	✓
MICHIGAN						Financial Partners Capital Management, LLC	New York		✓	✓	✓
Center for Financial Planning, Inc	Southfield	✓	✓	✓		Forbes Family Trust	New York		✓	✓	✓
Flexible Plan Investments, Ltd	Bloomfield Hills	✓	✓			HPM Partners	New York		✓	✓	✓
LJPR, LLC	Troy	✓	✓	✓	✓	HSW Advisors, HighTower	New York		✓	✓	✓
Mainstay Capital Management, LLC	Grand Blanc	✓	✓	✓	✓	Joel Isaacson & Co.	New York		✓	✓	
Rehmann Financial	Saginaw	✓	✓		✓	Klingman & Associates, LLC	New York	✓	✓	✓	✓
Retirement Funding Advisors, Inc	Troy	✓	✓	✓	✓	Lebenthal Asset Management, LLC	New York	✓	✓	✓	✓
Retirement Income Solutions, Inc	Ann Arbor	✓	✓	✓		M. Griffith Investment Services, Inc	New Hartford	✓	✓		
Zhang Financial	Portage	✓	✓	✓	✓	Morse, Towey and White Group	New York	✓	✓	✓	
MINNESOTA						Offit Capital	New York			✓	✓
JNBA Financial Advisors	Minneapolis	✓	✓	✓	✓	Ramius	New York	✓	✓	✓	✓
SilverOak Wealth Management, LLC	Edina	✓	✓	✓		RCL Advisors, LLC	New York		✓	✓	✓
Vector Wealth Management	Minneapolis	✓	✓	✓		Silvercrest Asset Management Group	New York City		✓	✓	✓
MISSISSIPPI						Snowden Lane Partners	New York	✓	✓	✓	✓
Medley & Brown, LLC	Ridgeland	✓	✓	✓	✓	Tiedemann Wealth Management	New York		✓	✓	✓
MISSOURI						NORTH CAROLINA					
Buckingham Asset Management	St. Louis	✓	✓	✓	✓	Carroll Financial Associates, Inc	Charlotte	✓	✓	✓	✓
Frontier Wealth Management, LLC	Kansas City	✓	✓	✓	✓	Delegate Advisors	Chapel Hill			✓	
Larson Financial Group, LLC	St. Louis	✓	✓	✓	✓	Novare Capital Management	Charlotte	✓	✓	✓	
Matter Family Office	St. Louis		✓	✓		Parsec Financial	Asheville	✓	✓	✓	✓
Moneta Group	Clayton		✓	✓	✓	Stearns Financial Group	Greensboro	✓	✓	✓	✓
Plancorp, LLC	St. Louis	✓	✓	✓	✓	OHIO					
RubinBrown Advisors	Clayton	✓	✓	✓	✓	Bartlett & Co., LLC	Cincinnati	✓	✓	✓	✓
Zemenick & Walker, Inc	St Louis	✓	✓	✓	✓	Budros, Ruhlin & Roe, Inc	Columbus	✓	✓	✓	✓
MONTANA						Carnegie Investment Counsel	Pepper Pike	✓	✓	✓	✓
Stack Financial Management	Whitefish	✓	✓	✓	✓	Cincinnati Asset Management, Inc	Cincinnati	✓	✓	✓	✓
NEBRASKA						Cornerstone Capital Advisors	Uniontown	✓	✓	✓	✓
Carson Wealth Management Group	Omaha	✓	✓	✓		Fairport Asset Management	Cleveland		✓	✓	
NEVADA						Fairway Wealth Management, LLC	Independence		✓	✓	
HighTower Las Vegas	Henderson	✓	✓	✓	✓	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	✓	✓	✓	✓						