

# 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
<b>ALABAMA</b>					
HighTower Twickenham	Huntsville	✓	✓	✓	✓
Keel Point, LLC	Huntsville	✓	✓	✓	✓
The Welch Group, LLC	Birmingham	✓	✓	✓	✓
Warren Averett Asset Management, LLC	Birmingham		✓	✓	✓
<b>ARIZONA</b>					
Alpha Fiduciary	Phoenix	✓	✓	✓	✓
Galvin, Gaustad & Stein, LLC	Scottsdale	✓	✓	✓	✓
Miller Russell Associates	Phoenix	✓	✓	✓	✓
TCI Wealth Advisors, Inc	Tucson	✓	✓	✓	✓
United Planners Financial Services	Scottsdale	✓	✓		✓
<b>ARKANSAS</b>					
Lathrop Investment Management Corp	Little Rock		✓	✓	✓

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<b>CALIFORNIA</b>					
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 Advisors, 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		✓	✓		<b>GEORGIA</b>						
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	✓	✓	✓		<b>HAWAII</b>						
Raub Brock Capital Management	Larkspur	✓	✓	✓	✓	CKW Financial Group	Honolulu	✓	✓	✓	✓	✓
RS Crum Inc	Newport Beach	✓	✓									
Sand Hill Global Advisors	Palo Alto		✓	✓	✓	<b>ILLINOIS</b>						
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	✓	✓	✓	✓	✓
<b>COLORADO</b>						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	✓	✓	✓	✓							
						<b>INDIANA</b>						
<b>CONNECTICUT</b>						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	✓	✓	✓	✓	<b>IOWA</b>						
Relyea Zuckerberg Hanson, LLC	Stamford		✓	✓		World Trend Financial	Cedar Rapids	✓	✓	✓		
<b>DISTRICT OF COLUMBIA</b>						<b>KANSAS</b>						
Avenir Corporation	Washington		✓	✓	✓	Creative Planning, Inc	Leawood	✓	✓	✓	✓	✓
Farr, Miller & Washington, LLC	Washington	✓	✓	✓	✓	Stepp & Rothwell, Inc	Overland Park	✓	✓	✓	✓	✓
						Sunrise Advisors	Leawood	✓	✓	✓	✓	✓
<b>FLORIDA</b>												
ARS Wealth Advisors	St. Petersburg	✓	✓	✓		<b>KENTUCKY</b>						
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	✓	✓	✓	✓	<b>LOUISIANA</b>						
Finser International Corporation, Inc	Miami	✓	✓	✓		Resource Management, LLC	Metairie	✓	✓	✓		

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<b>MARYLAND</b>						<b>NEW JERSEY</b>					
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		✓	✓	✓
<b>MASSACHUSETTS</b>						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		✓	✓	✓	<b>NEW MEXICO</b>					
Ballentine Partners, LLC	Waltham	✓	✓	✓		REDW Stanley Financial Advisors, LLC	Albuquerque	✓	✓	✓	✓
Breckinridge Capital Advisors, Inc	Boston	✓	✓	✓	✓	<b>NEW YORK</b>					
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		✓	✓	✓
<b>MICHIGAN</b>						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	✓	✓	✓	
<b>MINNESOTA</b>						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		✓	✓	✓
<b>MISSISSIPPI</b>						Snowden Lane Partners	New York	✓	✓	✓	✓
Medley & Brown, LLC	Ridgeland	✓	✓	✓	✓	Tiedemann Wealth Management	New York		✓	✓	✓
<b>MISSOURI</b>						<b>NORTH CAROLINA</b>					
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	✓	✓	✓	✓	<b>OHIO</b>					
RubinBrown Advisors	Clayton	✓	✓	✓	✓	Bartlett & Co., LLC	Cincinnati	✓	✓	✓	✓
Zemenick & Walker, Inc	St Louis	✓	✓	✓	✓	Budros, Ruhlin & Roe, Inc	Columbus	✓	✓	✓	✓
<b>MONTANA</b>						Carnegie Investment Counsel	Pepper Pike	✓	✓	✓	✓
Stack Financial Management	Whitefish	✓	✓	✓	✓	Cincinnati Asset Management, Inc	Cincinnati	✓	✓	✓	✓
<b>NEBRASKA</b>						Cornerstone Capital Advisors	Uniontown	✓	✓	✓	✓
Carson Wealth Management Group	Omaha	✓	✓	✓		Fairport Asset Management	Cleveland		✓	✓	
<b>NEVADA</b>						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	✓	✓	✓	
<b>OKLAHOMA</b>						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	✓	✓	✓	✓
<b>OREGON</b>						<b>UTAH</b>					
AKT Wealth Advisors LP	Lake Oswego	✓	✓	✓	✓	Soltis Investment Advisors, LLC	St George	✓	✓	✓	✓
Sloy, Dahl & Holst, Inc	Portland	✓	✓	✓	✓						
TRUE Private Wealth Advisors	Salem	✓	✓	✓	✓	<b>VERMONT</b>					
						Manchester Capital Management, LLC	Manchester		✓	✓	✓
<b>PENNSYLVANIA</b>											
Bergin, Roberts & Co. LLC	Blue Bell	✓	✓	✓	✓	<b>VIRGINIA</b>					
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	✓	✓	✓	✓
<b>RHODE ISLAND</b>						Sullivan, Bruyette, Speros & Blayney	McLean		✓	✓	✓
Endurance Wealth Management	Providence	✓	✓		✓	Verus Financial Partners	Richmond	✓	✓		✓
						Wilbanks, Smith & Thomas Asset Management, LLC	Norfolk	✓	✓	✓	✓
<b>TENNESSEE</b>											
Highland Capital Management, LLC	Memphis	✓	✓	✓	✓	<b>WASHINGTON</b>					
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	✓	✓	✓	✓
<b>TEXAS</b>						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		✓	✓	✓	<b>WISCONSIN</b>					
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	✓	✓	✓	✓						