

## FT 300: full 2017 list of top US registered investment advisers

The fourth annual line-up of leading advisers, with the methodology for inclusion



Financial advisers are offering a mix of technology and the personal touch

Loren Fox and Michael Ferraro JUNE 22, 2017

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This fourth edition of the FT 300 assesses registered investment advisers (RIAs) on desirable traits for investors.

To ensure a list of established companies with substantial expertise, we examine the database of RIAs registered with the US Securities and Exchange Commission and select those that reported to the SEC that they had \$300m or more in assets under management (AUM). The Financial Times' methodology is quantifiable and objective. The RIAs had no subjective input.

The FT invited qualifying RIA companies — more than 2,000 — to complete a lengthy application that gave us more information about them. We added this to our own research into their practices, including data from regulatory filings. Some 725 RIA companies applied and 300 made the final list.

The formula the FT uses to grade advisers is based on six broad factors and calculates a numeric score for each adviser. Areas of consideration include adviser AUM, asset growth, the company's age, industry certifications of key employees, SEC compliance record and online accessibility. The reasons these were chosen are as follows:

- **AUM** signals experience managing money and client trust.
- **AUM growth rate** can be a proxy for performance, as well as for asset retention and the ability to generate new business. We assessed companies on one- and two-year growth rates.

- **Companies' years in existence** indicates reliability and experience of managing assets through different market environments.
- **Compliance record** provides evidence of past client disputes; a string of complaints can signal potential problems.
- **Industry certifications (CFA, CFP, etc)** shows the company's staff has technical and industry knowledge, and signals a professional commitment to investment skills.
- **Online accessibility** demonstrates a desire to provide easy access and transparent contact information.

AUM comprised roughly 65 to 70 per cent of each adviser's score, while asset growth accounted for an additional 10 to 15 per cent.

Additionally, the FT caps the number of companies from any one state. The cap is roughly based on the distribution of millionaires across the US.

We present the FT 300 as an elite group, not a competitive ranking of one to 300. This is the fairest way to identify the industry's elite advisers while accounting for the companies' different approaches and different specialisations.

The research was conducted on behalf of the Financial Times by Ignites Research, a Financial Times sister publication.

# FT 300

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

Name	City	Client segments served			
		Retail	HNW*	Ultra HNW**	Institutional
<b>ALABAMA</b>					
Bridgeworth, LLC	Birmingham	✓	✓	✓	
Keel Point, LLC	Huntsville	✓	✓	✓	✓
Porter White & Company	Birmingham	✓	✓	✓	✓
RFG Advisory	Vestavia Hills	✓	✓	✓	✓
<b>ARIZONA</b>					
Dynamic Wealth Advisors	Scottsdale	✓	✓	✓	
Galvin, Gaustad & Stein, LLC	Scottsdale	✓	✓	✓	✓
MRA Associates	Phoenix	✓	✓	✓	✓
TCI Wealth Advisors, Inc.	Tucson	✓	✓	✓	✓
Total Investment Management, Inc.	Scottsdale	✓	✓		
<b>CALIFORNIA</b>					
Apriem Advisors	Irvine	✓	✓	✓	
Arlington Financial Advisors	Santa Barbara	✓	✓	✓	
Aspiriant	Los Angeles		✓	✓	✓
BOS (Bingham, Osborn & Scarborough)	San Francisco		✓	✓	✓
Bailard, Inc.	Foster City	✓	✓	✓	✓
Blankinship & Foster, LLC	Solana Beach	✓	✓	✓	✓
Burton Enright Welch	Walnut Creek	✓	✓	✓	✓
Cornerstone Capital, Inc.	Palo Alto		✓	✓	✓
Dixon Financial Services, Inc.	Lafayette	✓	✓	✓	✓
Donnelly Wealth Advisors, Inc.	San Diego	✓	✓	✓	✓
Dowling & Yahnke, LLC	San Diego		✓	✓	✓
Eclectic Associates	Fullerton	✓	✓	✓	✓
Ensemble Capital Management	Burlingame	✓	✓	✓	✓
First Republic Investment Management, Inc.	San Francisco	✓	✓	✓	✓
Golub Group	San Mateo	✓	✓	✓	✓
Gurtin Municipal Bond Management	Solana Beach		✓	✓	
Harris Financial Advisors, Inc.	Torrance	✓	✓	✓	✓
Hewins Financial   Wipfli Hewins	Redwood City	✓	✓	✓	✓
HighTower San Diego	San Diego	✓	✓	✓	
HoyleCohen, LLC	San Diego	✓	✓	✓	✓
Loring Ward	San Jose	✓	✓	✓	✓

LourdMurray	Beverly Hills	✓	✓	✓	
Main Management, LLC	San Francisco		✓	✓	✓
Miracle Mile Advisors	Los Angeles	✓	✓	✓	✓
Mission Wealth	Santa Barbara	✓	✓	✓	✓
Morton Capital Management	Calabasas	✓	✓	✓	✓
Penniall & Associates, Inc.	Pasadena	✓	✓		✓
Pillar Pacific Capital Management	Pacifica	✓	✓	✓	✓
Private Ocean Wealth Management, LLC	San Rafael		✓	✓	✓
Pure Financial Advisors, Inc.	San Diego	✓	✓		✓
Reilly Financial Advisors	La Mesa	✓	✓		✓
Sand Hill Global Advisors, LLC	Palo Alto	✓	✓	✓	✓
Scharf Investments, LLC	Scotts Valley	✓	✓	✓	✓

Name	City	Client segments served			
		Retail	HNW*	Ultra HNW**	Institutional
Schnieders Capital Management, LLC	Pasadena	✓	✓	✓	✓
Signature Estate & Investment Advisors, LLC	Los Angeles	✓	✓	✓	✓
The Bahnsen Group - HighTower	Newport Beach	✓	✓	✓	✓
The Ezzell-Conklin Group - HighTower	Folsom	✓	✓	✓	✓
United Capital Financial Advisers, LLC	Newport Beach	✓	✓	✓	✓
Violich Capital Management	San Francisco	✓	✓	✓	✓
Wacker Wealth Partners	San Luis Obispo	✓	✓	✓	✓
WealthSource Partners	San Luis Obispo	✓	✓	✓	
Weatherly Asset Management	Del Mar	✓	✓	✓	✓
Westmount Asset Management, LLC	Los Angeles	✓	✓	✓	✓
Wetherby Asset Management	San Francisco	✓	✓	✓	✓
Willow Creek Wealth Management, Inc.	Sebastopol	✓	✓	✓	✓
<b>COLORADO</b>					
BSW Wealth Partners	Boulder	✓	✓	✓	✓
Colorado Financial Management	Boulder	✓	✓	✓	✓
Janiczek Wealth Management	Greenwood Village		✓	✓	
Peak Asset Management, LLC	Louisville		✓	✓	
Wagner Wealth Management	Denver	✓	✓	✓	✓
<b>CONNECTICUT</b>					
Bradley, Foster & Sargent, Inc.	Hartford	✓	✓	✓	✓
Coastal Bridge Advisors	Westport	✓	✓	✓	✓
HTG Investment Advisors	New Canaan		✓	✓	
RZH Advisors	Stamford		✓	✓	
<b>DISTRICT OF COLUMBIA</b>					
Farr, Miller & Washington, LLC	Washington	✓	✓	✓	✓
<b>FLORIDA</b>					
ARS Wealth Advisors	St. Petersburg	✓	✓	✓	✓
Bott-Anderson Partners, Inc.	Jacksonville		✓	✓	✓
Cumberland Advisors	Sarasota	✓	✓	✓	✓
CV Advisors, LLC	Aventura			✓	✓
Heritage Investment Group, Inc.	Pompano Beach	✓	✓	✓	✓
Investor Solutions	Coconut Grove	✓	✓	✓	✓
Moisand Fitzgerald Tamayo, LLC	Orlando	✓	✓		✓
Resource Consulting Group	Orlando	✓	✓	✓	✓
Ruggie Wealth Management	Tavares	✓	✓	✓	✓
Singer Xenos Schechter Sosler Wealth Mgmt	Coral Gables	✓	✓	✓	✓

Water Oak Advisors	Winter Park	✓	✓	✓	✓
WE Family Offices	Miami			✓	
<b>GEORGIA</b>					
A. Montag and Associates	Atlanta		✓	✓	✓
American Financial Advisors, LLC	Marietta	✓	✓		✓
Balentine	Atlanta		✓	✓	✓

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		Retail	HNW*	Ultra HNW**	Institutional
Berkeley Capital Partners	Norcross	✓	✓	✓	✓
Berman Capital Advisors, LLC	Atlanta		✓	✓	✓
Brightworth	Atlanta	✓	✓	✓	✓
Buckhead Investment Partners, LLC	Atlanta	✓	✓		✓
Capital Investment Advisors	Atlanta	✓	✓	✓	
CornerCap Investment Counsel	Atlanta	✓	✓	✓	✓
Crawford Investment Counsel, Inc.	Atlanta	✓	✓	✓	✓
Homrich Berg	Atlanta	✓	✓	✓	✓
TrueWealth, LLC	Atlanta	✓	✓	✓	
Willis Investment Counsel	Gainesville		✓	✓	✓
<b>IDAHO</b>					
Rathbone Warwick Investment Management	Boise	✓	✓	✓	✓
<b>ILLINOIS</b>					
Archford Capital Strategies	Swansea	✓	✓	✓	✓
Balasa Dinverno Foltz LLC	Itasca		✓	✓	✓
Brownson, Rehmus & Foxworth	Chicago		✓	✓	✓
Chicago Partners Wealth Advisors	Chicago	✓	✓	✓	✓
Cozad Asset Management, Inc.	Champaign	✓	✓	✓	✓
Dearborn Partners, LLC	Chicago	✓	✓	✓	✓
Embree Financial Group	Chicago	✓	✓	✓	✓
Gofen and Glossberg, L.L.C.	Chicago	✓	✓	✓	✓
HighPoint Advisor Group, LLC	Downers Grove	✓	✓	✓	
Huber Financial Advisors, LLC	Lincolnshire		✓	✓	✓
IHT Wealth Management	Chicago	✓	✓	✓	
JMG Financial Group, Ltd.	Downers Grove		✓	✓	
Mid-Continent Capital LLC	Chicago		✓	✓	✓
Private Vista LLC	Chicago	✓	✓	✓	✓
RMB Capital	Chicago	✓	✓	✓	✓
Savant Capital, LLC	Rockford	✓	✓	✓	✓
Segall Bryant & Hamill	Chicago		✓	✓	✓
Stairway Partners, LLC	Chicago		✓	✓	✓
The Lerner Group - HighTower	Deerfield	✓	✓	✓	✓
The Mather Group	Chicago		✓	✓	✓
<b>INDIANA</b>					
Column Capital	Indianapolis	✓	✓	✓	✓
Deerfield Financial Advisors, Inc.	Indianapolis	✓	✓	✓	✓
Goelzer Investment Management	Indianapolis	✓	✓	✓	✓

Spectrum Management Group	Indianapolis	✓	✓	✓	✓
The Windsor Group, Ltd.	Indianapolis		✓	✓	✓
Valeo Financial Advisors, LLC	Indianapolis	✓	✓	✓	✓
<b>KANSAS</b>					
Creative Planning, Inc.	Leawood	✓	✓	✓	✓
Financial Advisory Service, Inc.	Leawood	✓	✓	✓	✓

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Sunrise Advisors	Leewood	✓	✓	✓	✓
<b>KENTUCKY</b>					
MCF Advisors, LLC	Covington	✓	✓	✓	✓
Parthenon LLC	Louisville		✓	✓	✓
<b>LOUISIANA</b>					
GWM Advisors, LLC	Baton Rouge	✓	✓	✓	
Resource Management, LLC	Metairie	✓	✓	✓	✓
Summit Financial Wealth Advisors	Lafayette	✓	✓	✓	✓
<b>MARYLAND</b>					
Baltimore-Washington Financial Advisors	Columbia	✓	✓	✓	✓
Bronfman E.L. Rothschild	Rockville	✓	✓	✓	✓
Cornerstone Advisory	Hunt Valley	✓	✓	✓	✓
FBB Capital Partners	Bethesda	✓	✓	✓	✓
Greenspring Wealth Management, Inc.	Towson	✓	✓		✓
Heritage Investors Management Corp.	Bethesda	✓	✓	✓	✓
Maryland Capital Management	Baltimore	✓	✓	✓	✓
Pinnacle Advisory Group, Inc.	Columbia	✓	✓	✓	
Planning Solutions Group, LLC	Fulton	✓	✓	✓	✓
Wagner Bowman Management Corp	Baltimore	✓	✓	✓	✓
WMS Partners, LLC	Towson		✓	✓	
<b>MASSACHUSETTS</b>					
Bainco International Investors, LLC	Boston		✓	✓	
Ballentine Partners, LLC	Waltham		✓	✓	
Beaumont Financial Partners, LLC	Needham	✓	✓	✓	✓
Birch Hill Investment Advisors LLC	Boston	✓	✓	✓	✓
Choate Investment Advisors LLC	Boston	✓	✓	✓	✓
Grimes & Company, Inc.	Westborough	✓	✓	✓	✓
Heritage Financial Services, LLC	Westwood	✓	✓	✓	
Lexington Wealth Management	Lexington	✓	✓	✓	
New England Private Wealth Advisors, LLC	Wellesley		✓	✓	✓
O'Brien Wealth Partners LLC	Boston	✓	✓	✓	✓
Schwerin Boyle Capital Management, Inc.	Springfield	✓	✓	✓	✓
Sensible Financial Planning and Mgmt	Waltham	✓	✓	✓	✓
St. Germain Investment Management	Springfield	✓	✓	✓	✓
TFC Financial Management	Boston		✓	✓	
The Colony Group	Boston	✓	✓	✓	✓

TwinFocus Capital Partners	Boston			✓	✓
West Branch Capital LLC	Amherst	✓	✓	✓	✓
Wilkins Investment Counsel, Inc.	Boston		✓	✓	✓
<b>MICHIGAN</b>					
Advance Capital Management	Southfield	✓	✓	✓	✓
Blue Chip Partners, Inc.	Farmington Hills	✓	✓	✓	✓

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Center for Financial Planning, Inc.	Southfield	✓	✓	✓	✓
Financial Advisory Corporation	Grand Rapids	✓	✓	✓	✓
Mainstay Capital Management, LLC	Grand Blanc	✓	✓	✓	✓
Plante Moran Financial Advisors	Southfield	✓	✓	✓	✓
Provident Investment Management, Inc.	Novi	✓	✓	✓	✓
Retirement Income Solutions, Inc.	Ann Arbor	✓	✓	✓	
Vintage Financial Services	Ann Arbor	✓	✓		
<b>MINNESOTA</b>					
Accredited Investors Wealth Management	Edina	✓	✓	✓	
Birchwood Financial Partners	Edina	✓	✓		
Carlson Capital Management	Northfield	✓	✓	✓	✓
SilverOak Wealth Management LLC	Edina	✓	✓	✓	
<b>MISSISSIPPI</b>					
Medley & Brown, LLC	Ridgeland	✓	✓	✓	✓
<b>MISSOURI</b>					
BKD Wealth Advisors, LLC	Springfield	✓	✓	✓	✓
Buckingham Strategic Wealth	St. Louis	✓	✓	✓	✓
Frontier Wealth Management, LLC	Kansas City	✓	✓	✓	✓
Moneta Group	Clayton	✓	✓	✓	✓
Paradigm Financial Advisors, LLC	Des Peres	✓	✓	✓	✓
Plancorp, LLC	St. Louis	✓	✓	✓	✓
Visionary Wealth Advisors, LLC	St. Louis	✓	✓	✓	✓
<b>MONTANA</b>					
Bitterroot Capital Advisors, LLC	Bozeman			✓	
<b>NEBRASKA</b>					
Bridges Investment Management	Omaha	✓	✓	✓	✓
JRM Investment Counsel	Omaha	✓	✓	✓	✓
<b>NEW HAMPSHIRE</b>					
Vigilant Capital Management	Portsmouth	✓	✓	✓	✓
<b>NEW JERSEY</b>					
Delta Financial Group, Inc.	Basking Ridge	✓	✓	✓	✓
Gateway Advisory, LLC	Westfield	✓	✓	✓	✓
Modera Wealth Management, LLC	Westwood		✓	✓	✓

Pathstone Federal Street	Englewood		✓	✓	✓
Personal CFO Solutions, LLC	Chester	✓	✓	✓	
Private Advisor Group, LLC	Morristown	✓	✓	✓	✓
RegentAtlantic	Morristown	✓	✓	✓	✓
<b>NEW MEXICO</b>					
REDW Stanley Financial Advisors, LLC	Albuquerque	✓	✓	✓	✓

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<b>NEW YORK</b>					
Alesco Advisors LLC	Pittsford		✓	✓	✓
Altfest Personal Wealth Management	New York	✓	✓	✓	✓
Bruderman Brothers, LLC	Suffern	✓	✓	✓	
Clarfeld Financial Advisors LLC	Tarrytown		✓	✓	✓
Courier Capital, LLC	Buffalo	✓	✓	✓	✓
Dynasty Wealth Management LLC	New York		✓	✓	✓
HPM Partners LLC	New York		✓	✓	✓
HSW Advisors - HighTower	New York		✓	✓	✓
Joel Isaacson & Co., LLC	New York	✓	✓	✓	
Kings Point Capital Management, LLC	Great Neck	✓	✓	✓	✓
RCL Advisors, LLC	New York	✓	✓	✓	✓
Ritholtz Wealth Management	New York	✓	✓	✓	✓
Sanderson Wealth Management	Buffalo		✓	✓	
Sandhill Investment Management	Buffalo	✓	✓	✓	✓
Snowden Lane Partners	New York		✓	✓	✓
Tiedemann Wealth Management	New York			✓	✓
Treasury Partners - HighTower	New York		✓	✓	
Wealthstream Advisors, Inc.	New York	✓	✓	✓	✓
<b>NORTH CAROLINA</b>					
Cornerstone Wealth	Huntersville	✓	✓	✓	✓
Delegate Advisors	Chapel Hill			✓	
Hamilton Point Investment Advisors	Chapel Hill		✓	✓	✓
Novare Capital Management	Charlotte	✓	✓	✓	✓
Parsec Financial Management, Inc.	Asheville	✓	✓	✓	✓
Smith, Salley & Associates, LLC	Greensboro	✓	✓	✓	✓
Stearns Financial Group	Greensboro	✓	✓	✓	✓
Triad Financial Advisors, Inc. (TFA)	Greensboro	✓	✓	✓	
<b>OHIO</b>					
Bahl & Gaynor Investment Counsel	Cincinnati	✓	✓	✓	✓
Bartlett & Co. LLC	Cincinnati	✓	✓	✓	✓
Budros, Ruhlin & Roe, Inc.	Columbus	✓	✓	✓	✓
Capital Advisors, Ltd.	Shaker Heights	✓	✓	✓	✓
Carnegie Investment Counsel	Pepper Pike	✓	✓	✓	✓
Fairport Asset Management	Cleveland		✓	✓	
Fairway Wealth Management LLC	Independence		✓	✓	
Foster & Motley, Inc.	Cincinnati	✓	✓	✓	✓
Hamilton Capital Management, Inc.	Columbus	✓	✓	✓	✓

Horter Investment Management, LLC	Cincinnati	✓			✓
Johnson Investment Counsel	Cincinnati	✓	✓	✓	✓
MAI Capital Management, LLC	Cleveland	✓	✓	✓	✓
Pinnacle Wealth Planning Services, Inc.	Mansfield	✓	✓	✓	✓
RiverPoint Capital Management	Cincinnati	✓	✓	✓	✓
Truepoint Wealth Counsel	Cincinnati	✓	✓	✓	✓

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		Retail	HNW*	Ultra HNW**	Institutional
<b>OKLAHOMA</b>					
Retirement Investment Advisors, Inc.	Oklahoma City	✓	✓	✓	✓
Tom Johnson Investment Management, LLC	Oklahoma City	✓	✓	✓	✓
<b>OREGON</b>					
Becker Capital Management	Portland		✓	✓	✓
Cable Hill Partners	Portland	✓	✓	✓	✓
Ferguson Wellman Capital Management	Portland	✓	✓	✓	✓
McGee Wealth Management, Inc.	Portland	✓	✓	✓	✓
Northside Capital Management LLC	Hood River		✓	✓	✓
<b>PENNSYLVANIA</b>					
BLB&B Advisors, LLC	Ambler		✓	✓	✓
Concentus Wealth Advisors	King of Prussia	✓	✓	✓	✓
Guyasuta Investment Advisors	Pittsburgh	✓	✓	✓	✓
HBKS Wealth Advisors	Erie	✓	✓	✓	✓
Mill Creek Capital Advisors, LLC	Conshohocken			✓	✓
myCIO Wealth Partners, LLC	Philadelphia	✓	✓	✓	✓
ParenteBeard Wealth Management	Lancaster	✓	✓	✓	✓
Permit Capital Advisors, LLC	West Conshohocken			✓	✓
Radnor Financial Advisors, LLC	Wayne	✓	✓	✓	
RTD Financial	Philadelphia	✓	✓	✓	✓
Sage Financial Group	Conshohocken	✓	✓	✓	
Schneider Downs Wealth Mgmt Advisors	Pittsburgh	✓	✓	✓	✓
The Sarian Group - HighTower	Wayne		✓	✓	
Waldron Private Wealth	Bridgeville		✓	✓	
<b>SOUTH CAROLINA</b>					
Abacus Planning Group, Inc.	Columbia	✓	✓	✓	✓
<b>TENNESSEE</b>					
Legacy Wealth Management, Inc.	Memphis	✓	✓	✓	✓
Patriot Investment Management Group, Inc.	Knoxville	✓	✓	✓	✓
The Patten Group, Inc.	Chattanooga	✓	✓	✓	✓
<b>TEXAS</b>					
Ackerman Capital Management, LP	Dallas	✓	✓	✓	✓
Annandale Capital	Dallas		✓	✓	✓
Austin Asset	Austin	✓	✓	✓	✓
Avalon Advisors, LLC	Houston		✓	✓	✓

Beird Harris	Dallas	✓	✓	✓	✓
Century Management	Austin	✓	✓	✓	✓
Covenant	San Antonio	✓	✓	✓	✓
Financial Management Professionals, Inc.	Austin	✓	✓	✓	✓
Financial Synergies Asset Management, Inc.	Houston	✓	✓	✓	✓
Frontier Investment Management Company	Dallas	✓	✓	✓	✓
Insight Wealth Partners, LLC	Plano	✓	✓	✓	

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		Retail	HNW*	Ultra HNW**	Institutional
Legacy Asset Management	Houston	✓	✓	✓	✓
Level Four Advisory Services, LLC	Plano	✓	✓	✓	✓
Luther King Capital Management	Fort Worth		✓	✓	✓
PartnersInWealth	Houston	✓	✓	✓	
RAA	Addison	✓	✓		
Sather Financial Group, Inc.	Victoria	✓	✓	✓	✓
SFMG Wealth Advisors	Plano	✓	✓	✓	
South Texas Money Management, Ltd.	San Antonio	✓	✓	✓	✓
Syntal Capital Partners, LLC	Midland	✓	✓	✓	
Tolleson Wealth Management	Dallas			✓	
Venturi Wealth Management	Austin		✓	✓	✓
WorthPointe	Austin	✓	✓	✓	✓
<b>UTAH</b>					
Soltis Investment Advisors, LLC	St. George	✓	✓	✓	✓
The Insight Group	Salt Lake City		✓	✓	✓
<b>VIRGINIA</b>					
Edelman Financial Services, LLC	Fairfax	✓	✓	✓	✓
Glassman Wealth Services	Vienna	✓	✓	✓	✓
Hemington Wealth Management	Falls Church	✓	✓	✓	✓
Mason Investment Advisory Services, Inc.	Reston	✓	✓	✓	✓
Palladium Registered Investment Advisors	Norfolk	✓	✓	✓	✓
Partners in Financial Planning, LLC	Salem	✓	✓	✓	✓
Sullivan, Bruyette, Speros & Blayney, LLC	McLean	✓	✓	✓	✓
Verus Financial Partners	Richmond	✓	✓		✓
VWG Wealth Management - HighTower	Vienna		✓	✓	✓
West Financial Services, Inc.	McLean	✓	✓	✓	✓
<b>WASHINGTON</b>					
Badgley Phelps Wealth Managers	Seattle		✓	✓	✓
Brighton Jones	Seattle	✓	✓	✓	✓
Coldstream Wealth Management	Bellevue	✓	✓	✓	✓
Empirical Wealth Management	Seattle	✓	✓	✓	
Fisher Investments	Camas	✓	✓	✓	✓
Freestone Capital Management, LLC	Seattle	✓	✓	✓	✓
Garde Capital, Inc.	Seattle	✓	✓	✓	✓
Greene Wealth Management, LLC	Seattle	✓	✓	✓	✓
Merriman Wealth Management	Seattle	✓	✓	✓	
Schmidt Financial Group, Inc.	Kirkland	✓	✓	✓	

<b>WISCONSIN</b>					
Advisors' Pride, Inc.	Appleton	✓	✓	✓	✓
Dana Investment Advisors, Inc.	Waukesha	✓	✓	✓	✓
Northern Oak Wealth Management, Inc.	Milwaukee	✓	✓	✓	✓
*High net worth (clients with \$1m-\$10m in investable assets) **Ultra high net worth (clients with \$10m or more in investable assets)					

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