

Special Report **Financial Advice**

FT 300 – the list: the top US registered investment advisers 2018

Atlanta overtakes New York as home to the greatest number of top RIAs



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The independent investment advisers that represent the clearest alternatives to big brokerages in the US have long had a reputation for being small and idiosyncratic. The leading registered investment advisers (RIAs), however, look more like large companies angling for an edge in a maturing business, Financial Times research shows.

The growth of the large RIAs is visible in this fifth annual FT 300 Top Registered Investment Advisers list. The median FT 300 company manages \$1.7bn in assets — compared with \$1.2bn in last year's list. RIAs with more than \$1bn in assets under management (AUM) also increased, from 57 per cent of 2017's crop to 74 per cent this year.

The median FT 300 company has 13 employees involved in providing investment advice, from working with clients to researching funds — up from 11 in last year's list.

Robust financial market gains last year, including a [nearly 22 per cent total return on the S&P 500](#), is one reason this year's group enjoyed an average 30 per cent increase in AUM in 2017.

The markets have been choppy in 2018, which is fine with many elite RIAs; most of the FT 300 companies focus less on emphasising their investing acumen and instead stress their value in helping investors craft a financial plan and stick to it.

One example is JOYN, based in Atlanta, which offers what it calls “behavioural wealth management” that aims to address investors’ stress responses to markets and decision-making.

AdvicePeriod of Los Angeles focuses on planning services — managing cash flow, planning for retirement, creating estate plans and more — while it outsources most investment decisions.

All the elite RIAs in the FT 300 are striving to differentiate themselves. Some 40 per cent stress their expertise in helping retirees, for example, while 23 per cent specialise in helping entrepreneurs, and 17 per cent specialise in trusts and estates. Some RIA companies are large enough to emphasise all three specialities.

Consolidation is making some of the big advisers even larger. Following a record 152 mergers in 2017, this year began with a [record 47 deals](#) among RIAs in the first quarter (compared with 46 in Q1 2017), according to DeVoe & Co, a provider of consulting and banking services to advisers.

Focus Financial Partners, which has acquired large stakes in more than 50 practices around the US since it was founded in 2006, has 14 portfolio companies in the list — double the number of affiliates it had in last year’s FT 300.

Focus recently filed to be the first RIA consolidator to go public, a development that could kindle even more interest in the RIA market.

One of the year’s [biggest mergers](#) was announced in April, uniting two of the largest RIAs in the FT 300: Financial Engines — considered one of the first “robo-advisers” because it uses automated investing techniques — and the more traditional Edelman Financial Services, which has more than 40 offices around the US.

The “robo” investing model has proved popular enough that two other robo-advisers made the FT 300, Betterment and Personal Capital.

The FT 300 list reflects the intense competition between advisers. Many companies made the list by edging out peers on only minor differences.

The final list includes advisers from 38 states and Washington DC. Traditional RIAs’ growing use of technology, such as software to manage investment portfolios and create financial plans, means regional and national practices can flourish far from Wall Street.

Many companies made the list by edging out peers on only minor differences

This year marks the first time that Atlanta was home to the most FT 300 advisers, with 14. New York was second, with 12.

RIAs might be battling between each other, but they are all benefiting from the investment industry’s -

gradual embrace of the “fiduciary” standard.

That standard, an obligation for RIAs, requires putting investors’ interests first — rather than the less onerous obligation on brokers to recommend merely “suitable” investments.

In 2017, the US Department of Labor (DOL) proposed a similar fiduciary standard for broker-dealers, sparking a public debate over the benchmarks used to ascertain quality in the adviser market.

Although a [US Court of Appeals](#) struck down the DOL rule in March this year, advisers’ initial preparations ahead of implementation of the rule and the spotlight it shone on quality accelerated the marketplace’s adoption of the fiduciary approach.

However, the battle on standards continues; in April, the [Securities and Exchange Commission](#) (SEC) proposed a rule that would require all advisers, including brokers, to work in the “best interests” of investors. No one can predict what any final SEC rule will look like or when it might take effect, so in the meantime RIAs differentiate themselves in part by publicising their higher standard of care and commitment to put investors first.

Indeed, the FT 300 companies, on average, estimate that they manage 94 per cent of client assets to a fiduciary standard.

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

Company	City	Client segments served			
		Retail (<\$1 million)	High Net Worth (\$1 million - \$10 million)	Ultra-High Net Worth (\$10 million +)	Institutional
ALABAMA					
Bridgeworth, LLC	Birmingham	✓	✓	✓	
HighTower Twickenham	Huntsville		✓	✓	✓
Keel Point, LLC	Huntsville	✓	✓	✓	✓
Porter White & Company	Birmingham		✓	✓	✓
Warren Averett Asset Management, LLC	Birmingham	✓	✓	✓	✓
ARIZONA					
MRA Associates	Phoenix	✓	✓	✓	✓
TCI Wealth Advisors, Inc.	Tucson	✓	✓	✓	✓
TFO Phoenix, Inc.	Phoenix	✓	✓	✓	✓
Versant Capital Management, Inc.	Phoenix		✓	✓	
CALIFORNIA					
AdvicePeriod	Los Angeles	✓	✓	✓	✓
Apriem Advisors	Irvine	✓	✓	✓	
Aspiriant	Los Angeles		✓	✓	
BJOS	San Francisco		✓	✓	✓
Bailard, Inc.	Foster City	✓	✓	✓	✓
Burton Enright Welch	Walnut Creek	✓	✓	✓	✓
Cambria Investment Management, LP	El Segundo	✓	✓	✓	✓
Cardiff Park Advisors	San Marcos	✓	✓	✓	✓
Check Capital Management Inc.	Costa Mesa	✓	✓	✓	✓
Churchill Management Group	Los Angeles	✓	✓	✓	✓
Clifford Swan Investment Counselors	Pasadena		✓	✓	✓
CoastEdge Partners, LLC	La Jolla		✓	✓	
Corient Capital Partners	Newport Beach		✓	✓	✓
Cornerstone Capital, Inc.	Palo Alto		✓	✓	✓
Destination Wealth Management	Walnut Creek	✓	✓	✓	✓
Dowling & Yahnke, LLC	San Diego		✓	✓	✓
Efficient Market Advisors	La Jolla	✓	✓	✓	✓
Ensemble Capital Management	Burlingame	✓	✓	✓	✓
EP Wealth Advisors	Torrance	✓	✓	✓	✓
Financial Engines	Sunnyvale	✓	✓		✓
First Republic Investment Management	San Francisco	✓	✓	✓	✓
Gurtin Municipal Bond Management	Solana Beach		✓	✓	
HighTower San Diego	San Diego	✓	✓	✓	
HoweCohen LLC	San Diego	✓	✓	✓	✓

Proyconer LLC	San Diego				
Index Fund Advisors, Inc.	Irvine	✓	✓	✓	✓
Kayne Anderson Rudnick Investment Management, LLC	Los Angeles	✓	✓	✓	✓
L&S Advisors, Inc.	Los Angeles	✓	✓	✓	✓
Lido Advisors LLC	Los Angeles	✓	✓	✓	✓
Litman Gregory Asset Management	Larkspur	✓	✓	✓	✓
Loring Ward	San Jose	✓	✓	✓	✓
LourdMurray	Beverly Hills	✓	✓	✓	
Main Street Research LLC	Sausalito	✓	✓	✓	✓
Parallel Advisors LLC	San Francisco	✓	✓	✓	✓
Personal Capital	San Francisco	✓	✓	✓	
Pillar Pacific Capital Management	Pacifica	✓	✓	✓	✓
PlanMember Financial Corporation	Carpinteria	✓	✓		✓
Polaris Greystone Financial Group, LLC	San Rafael	✓	✓	✓	✓
Pure Financial Advisors, Inc.	San Diego	✓	✓		
Rand & Associates	San Francisco	✓	✓	✓	✓
Raub Brock Capital Management	Larkspur	✓	✓	✓	✓
Reilly Financial Advisors	La Mesa	✓	✓	✓	✓
Sand Hill Global Advisors, LLC	Palo Alto		✓	✓	✓
Sierra Investment Management, Inc.	Santa Monica	✓	✓	✓	✓
Signature Estate & Investment Advisors, LLC	Los Angeles	✓	✓	✓	✓
Steel Peak Wealth Management, LLC	Woodland Hills	✓	✓	✓	
The Bahnsen Group at HighTower	Newport Beach	✓	✓	✓	✓
United Capital Financial Advisors, LLC	Newport Beach	✓	✓	✓	✓
WealthSource Partners	Arroyo Grande	✓	✓	✓	✓
Weatherly Asset Management	Del Mar		✓	✓	✓
West Coast Financial, LLC	Santa Barbara	✓	✓	✓	✓
Wetherby Asset Management	San Francisco		✓	✓	
Willow Creek Wealth Management	Sebastopol		✓	✓	✓
COLORADO					
Carnick & Kubik Group, LLC	Denver	✓	✓	✓	
Colorado Financial Management	Boulder	✓	✓	✓	✓
The Institute for Wealth Management	Denver	✓	✓		✓
CONNECTICUT					
Belpointe Asset Management LLC	Greenwich	✓	✓	✓	✓
Coastal Bridge Advisors	Westport		✓	✓	
Greenwich Investment Management, Inc.	Stamford	✓	✓	✓	✓
MJP Wealth Advisors	Farmington	✓	✓	✓	
RDM Financial Group at HighTower	Westport		✓	✓	
DELAWARE					
Affinity Wealth Management LLC	Wilmington	✓	✓	✓	✓
DISTRICT OF COLUMBIA					
Alexandria Capital LLC	Washington	✓	✓	✓	✓
FLORIDA					
BigSur Partners	Miami			✓	
Day Hagan Asset Management	Sarasota	✓	✓	✓	✓
Dimension Capital Management	Miami		✓	✓	✓

GenTrust, LLC	Miami		✓	✓	✓
Heritage Investment Group, Inc.	Pompano Beach	✓	✓	✓	✓
Investacorp Advisory Services, Inc.	Miami	✓	✓	✓	✓
Resource Consulting Group	Orlando		✓	✓	✓
Ruggie Wealth Management	Tavares	✓	✓	✓	✓
Steinberg Global Asset Management, Ltd.	Boca Raton	✓	✓	✓	✓
Valor Advisors LLC	Miami			✓	
WaterOak Advisors	Winter Park	✓	✓	✓	✓
WE Family Offices	Miami			✓	
GEORGIA					
Asset Preservation Advisors	Atlanta	✓	✓	✓	✓
Berman Capital Advisors, LLC	Atlanta		✓	✓	✓
BIP Wealth, LLC	Atlanta	✓	✓	✓	✓
Brightworth	Atlanta	✓	✓	✓	✓
Cahaba Wealth Management	Atlanta	✓	✓	✓	✓
Capital Directions	Atlanta	✓	✓	✓	✓
Capital Investment Advisors	Atlanta	✓	✓		
Cedar Rowe Partners	Atlanta	✓	✓	✓	
CIBC Atlantic Trust Private Wealth Management	Atlanta	✓	✓	✓	✓
CornerCap Investment Counsel	Atlanta		✓	✓	✓
Homrich Berg	Atlanta	✓	✓	✓	✓
JOYN	Atlanta		✓	✓	
Merit Financial Advisors	Alpharetta	✓	✓	✓	
Rollins Financial, Inc.	Atlanta	✓	✓	✓	✓
Stewardship Financial Advisors	Stockbridge	✓	✓	✓	
TrueWealth, LLC	Atlanta	✓	✓	✓	
ILLINOIS					
Altair Advisers LLC	Chicago		✓	✓	
Balasa Dinverno Foltz LLC	Itasca		✓	✓	✓
Brownson, Rehmus & Foxworth	Chicago		✓	✓	✓
Capstone Financial Advisors	Downers Grove	✓	✓	✓	✓
Chicago Partners Wealth Advisors	Chicago	✓	✓	✓	✓
Crescent Grove Advisors	Lake Forest		✓	✓	✓
Dearborn Partners, LLC	Chicago	✓	✓	✓	✓
EMBREE FINANCIAL Group	Chicago	✓	✓	✓	✓
Forum Financial Management, LP	Lombard	✓	✓	✓	✓
HighPoint Advisor Group, LLC	Downers Grove	✓	✓	✓	✓
IHT Wealth Management	Chicago	✓	✓	✓	
IPI Wealth Management, Inc.	Decatur	✓	✓	✓	✓
JMG Financial Group, Ltd.	Downers Grove		✓	✓	
Private Vista LLC	Chicago	✓	✓	✓	✓
RMB Capital	Chicago	✓	✓	✓	✓
Savant Capital, LLC	Rockford	✓	✓	✓	✓
Segall Bryant & Hamill	Chicago	✓	✓	✓	✓
Strategic Wealth Partners	Deerfield	✓	✓	✓	✓
The Lerner Group at HighTower	Deerfield	✓	✓	✓	✓
The Mather Group	Chicago		✓	✓	
Vivaldi Capital Management	Chicago	✓	✓	✓	✓
INDIANA					

Bedel Financial Consulting	Indianapolis	✓	✓	✓	
Donaldson Capital Management, LLC	Evansville	✓	✓	✓	✓
Lakeside Wealth Management	Chesterton	✓	✓	✓	✓
The Windsor Group, Ltd.	Indianapolis	✓	✓	✓	✓
Valeo Financial Advisors, LLC	Indianapolis	✓	✓	✓	✓
IOWA					
Foster Group	West Des Moines	✓	✓	✓	✓
KANSAS					
Creative Planning, Inc.	Leawood	✓	✓	✓	✓
Financial Advisory Service, Inc.	Leawood	✓	✓	✓	✓
Mariner Wealth Advisors	Overland Park	✓	✓	✓	✓
KENTUCKY					
ARGI Investment Services	Louisville	✓	✓	✓	✓
Stegner Investment Associates, Inc.	Louisville		✓	✓	✓
LOUISIANA					
Goss Advisors	New Orleans	✓	✓	✓	✓
Resource Management, LLC	Metairie		✓	✓	
Stokes & Hubbell Capital Management, LLC	New Orleans	✓	✓	✓	✓
MARYLAND					
Baltimore-Washington Financial Advisors	Columbia	✓	✓	✓	✓
Bronfman Rothschild	Rockville	✓	✓	✓	✓
Heritage Investors Management Corp.	Bethesda	✓	✓	✓	✓
Horan Capital Management	Hunt Valley	✓	✓	✓	✓
Pinnacle Advisory Group	Columbia		✓		
Planning Solutions Group, LLC	Fulton	✓	✓	✓	✓
StratWealth	Columbia	✓	✓		✓
WBH Advisory, Inc.	Baltimore	✓	✓	✓	✓
WMS Partners, LLC	Towson		✓	✓	
MASSACHUSETTS					
Adviser Investments	Newton	✓	✓	✓	✓
Bainco International Investors, LLC	Boston		✓	✓	
Beaumont Financial Partners, LLC	Needham		✓	✓	✓
Choate Investment Advisors LLC	Boston		✓	✓	✓
Congress Wealth Management, LLC	Boston	✓	✓	✓	✓
Crestwood Advisors	Boston	✓	✓	✓	
Grimes & Company, Inc.	Westborough	✓	✓	✓	✓
Heritage Financial Services, LLC	Westwood		✓	✓	
Lexington Wealth Management	Lexington	✓	✓	✓	✓
New England Private Wealth Advisors, LLC	Wellesley		✓	✓	✓
Proficio Capital Partners LLC	Newton			✓	
SCS Financial	Boston			✓	✓
St. Germain Investment Management	Springfield	✓	✓	✓	✓
The Colony Group	Boston	✓	✓	✓	✓
TwinFocus Capital Partners	Boston			✓	✓
MICHIGAN					
Advance Capital Management	Southfield	✓	✓	✓	✓

MISSISSIPPI					
Blue Chip Partners, Inc.	Farmington Hills	✓	✓	✓	✓
Center for Financial Planning, Inc.	Southfield	✓	✓	✓	✓
FormulaFolio Investments	Grand Rapids	✓	✓		
Provident Investment Management, Inc.	Novi	✓	✓	✓	✓
Retirement Wealth	Grand Rapids	✓	✓		
Vintage Financial Services, LLC	Ann Arbor	✓	✓	✓	
MINNESOTA					
Accredited Investors Wealth Management	Edina	✓	✓	✓	✓
AdvisorNet Financial	Minneapolis	✓	✓	✓	
Carlson Capital Management	Northfield	✓	✓	✓	✓
CliffonLarsonAllen Wealth Advisors, LLC	Minneapolis	✓	✓	✓	✓
EFS Advisors	Cambridge	✓	✓		
Gradient Investments, LLC	Arden Hills	✓	✓	✓	
JNBA Financial Advisors	Minneapolis	✓	✓	✓	✓
Minneapolis Portfolio Management Group LLC	Minneapolis	✓	✓	✓	✓
SilverOak Wealth Management LLC	Edina	✓	✓	✓	
Vector Wealth Management	Minneapolis	✓	✓	✓	✓
MISSISSIPPI					
Medley & Brown, LLC	Ridgeland	✓	✓	✓	✓
MISSOURI					
Buckingham Strategic Wealth	St. Louis	✓	✓	✓	✓
Frontier Wealth Management, LLC	Kansas City	✓	✓	✓	
Krilogy	St. Louis	✓	✓	✓	✓
Moneta Group	Clayton	✓	✓	✓	✓
Mosaic Family Wealth, LLC	St. Louis		✓	✓	✓
Plancorp	St. Louis	✓	✓	✓	✓
MONTANA					
Bitterroot Capital Advisors, LLC	Bozeman			✓	
NEBRASKA					
Bridges Investment Management, Inc.	Omaha	✓	✓	✓	✓
Carson Wealth Management Group	Omaha	✓	✓	✓	
NEW HAMPSHIRE					
Vigilant Capital Management	Portsmouth	✓	✓	✓	✓
NEW JERSEY					
Advisors Capital Management, LLC	Ridgewood	✓	✓	✓	✓
CFS Investment Advisory Services, L.L.C.	Totowa	✓	✓	✓	✓
Circle Wealth Management	Summit		✓	✓	
Delta Financial Group, Inc.	Basking Ridge	✓	✓		
Massey Quick Simon	Morristown	✓	✓	✓	✓
Meyer Capital Group	Marlton	✓	✓	✓	✓
Modera Wealth Management, LLC	Westwood	✓	✓	✓	✓
Private Advisor Group, LLC	Morristown	✓	✓	✓	✓
RegentAtlantic	Morristown	✓	✓	✓	✓
Sax Wealth Advisors, LLC	Clifton	✓	✓	✓	✓
Withum Wealth Management	Red Bank	✓	✓	✓	✓

NEW MEXICO					
REDW Stanley Financial Advisors, LLC	Albuquerque	✓	✓	✓	✓
NEW YORK					
AJ Wealth	New York		✓	✓	
Alesco Advisors LLC	Pittsford		✓	✓	✓
AlphaCentric Advisors LLC	Huntington	✓	✓	✓	✓
Betterment	New York	✓	✓	✓	✓
Courier Capital, LLC	Buffalo	✓	✓	✓	✓
Douglas C. Lane & Associates	New York	✓	✓	✓	✓
HPM Partners LLC	New York		✓	✓	✓
Ingalls & Snyder LLC	New York	✓	✓	✓	✓
Joel Isaacson & Co., LLC	New York	✓	✓	✓	
Klingenstein Fields Wealth Advisors	New York	✓	✓	✓	
Ritholtz Wealth Management	New York	✓	✓	✓	✓
Sandhill Investment Management	Buffalo	✓	✓	✓	✓
Snowden Lane Partners	New York		✓	✓	✓
Strategic Financial Services, Inc.	Utica	✓	✓	✓	✓
Summit Trail Advisors	New York		✓	✓	✓
Tiedemann Advisors, LLC	New York			✓	✓
Wealthstream Advisors, Inc.	New York	✓	✓	✓	✓
NORTH CAROLINA					
Cardinal Capital Management, Inc.	Raleigh	✓	✓	✓	✓
Carroll Financial Associates, Inc.	Charlotte	✓	✓	✓	✓
Cornerstone Wealth	Huntersville	✓	✓	✓	✓
Novare Capital Management	Charlotte	✓	✓	✓	
Parsec Financial Management	Asheville	✓	✓	✓	✓
Stearns Financial Group	Chapel Hill		✓	✓	✓
Triad Financial Advisors, Inc. (TFA)	Greensboro	✓	✓	✓	
Willingdon Wealth Management	Huntersville	✓	✓	✓	✓
Woodward Financial Advisors, Inc.	Chapel Hill	✓	✓	✓	✓
OHIO					
Aurum Wealth Management	Mayfield Village	✓	✓	✓	✓
Bartlett Wealth Management	Cincinnati	✓	✓	✓	✓
Budros, Ruhlín & Roe, Inc.	Columbus	✓	✓	✓	✓
Carnegie Investment Counsel	Pepper Pike	✓	✓	✓	✓
Fairport Asset Management	Cleveland		✓	✓	
Hamilton Capital Management, Inc.	Columbus	✓	✓	✓	✓
Johnson Investment Counsel	Cincinnati	✓	✓	✓	✓
MAI Capital Management, LLC	Cleveland	✓	✓	✓	✓
Mariner Wealth Advisors - Cincinnati	Cincinnati	✓	✓	✓	✓
Prosperity Capital Advisors	Westlake	✓	✓		✓
SJS Investment Services	Sylvania	✓	✓	✓	✓
Summit Financial Strategies, Inc.	Columbus	✓	✓	✓	✓
Truepoint Wealth Counsel	Cincinnati		✓	✓	✓
OKLAHOMA					
Exencial Wealth Advisors	Oklahoma City	✓	✓	✓	✓
Tom Johnson Investment Management, LLC	Oklahoma City	✓	✓	✓	✓

OREGON					
Ferguson Wellman Capital Management	Portland	✓	✓	✓	✓
McGee Wealth Management, Inc.	Portland	✓	✓	✓	✓
TRUE Private Wealth Advisors	Salem	✓	✓	✓	✓
PENNSYLVANIA					
Alpha Architect	Broomall	✓	✓	✓	✓
BLB&B Advisors, LLC	Ambler	✓	✓	✓	✓
CooksonPeirce Wealth Management	Pittsburgh	✓	✓	✓	✓
Fort Pitt Capital Group, LLC	Pittsburgh	✓	✓	✓	✓
HBKS Wealth Advisors	Erie	✓	✓	✓	✓
Hoover Financial Advisors	Malvern	✓	✓	✓	
Ironview Capital Management LLC	King of Prussia	✓	✓	✓	✓
JFS Wealth Advisors	Hermitage	✓	✓	✓	✓
Mill Creek Capital Advisors, LLC	Conshohocken	✓	✓	✓	✓
myCIO Wealth Partners, LLC	Philadelphia			✓	✓
Northeast Financial Group, Inc.	Tannersville	✓	✓	✓	✓
Radnor Financial Advisors, LLC	Wayne	✓	✓	✓	
RTD Financial	Philadelphia		✓	✓	✓
The Good Life Companies	Reading	✓	✓		
Veritable, LP	Newtown Square		✓	✓	✓
Waldron Private Wealth	Bridgeville		✓	✓	✓
RHODE ISLAND					
Capital Wealth Management	West Warwick	✓	✓	✓	✓
TENNESSEE					
Rather & Kittrell	Knoxville	✓	✓	✓	✓
TrustCore, LLC	Brentwood	✓	✓	✓	✓
TEXAS					
360 Wealth Management	Dallas	✓	✓	✓	
Avalon Advisors, LLC	Houston		✓	✓	✓
Financial Synergies Wealth Advisors, Inc.	Houston	✓	✓	✓	✓
Frontier Investment Management Company	Dallas	✓	✓	✓	✓
Legacy Asset Management, Inc.	Houston	✓	✓		✓
Level Four Advisory Services, LLC	Plano	✓	✓	✓	✓
Money Matters with Ken Moraif	Plano	✓	✓		✓
Pin Oak Investment Advisors, Inc.	Houston		✓	✓	
RAA	Addison	✓	✓		
Sather Financial Group, Inc.	Victoria	✓	✓	✓	✓
Smith Anglin Financial, LLC	Dallas	✓	✓	✓	✓
Syntal Capital Partners, LLC	Midland	✓	✓	✓	
Venturi Wealth Management, LLC	Austin		✓	✓	✓
UTAH					
The Insight Group	Salt Lake City	✓	✓		✓
VIRGINIA					
Acorn Financial Advisory Services, Inc.	Reston	✓	✓	✓	
Bogart Wealth	McLean	✓	✓	✓	
Burnev Company	Reston	✓	✓	✓	✓

Company	Address	✓	✓	✓	✓
Gary Street Partners Investment Advisory LLC	Richmond	✓	✓	✓	✓
Cassaday & Company, Inc.	McLean	✓	✓	✓	
CJM Wealth Advisers, Ltd.	Fairfax	✓	✓	✓	✓
Edelman Financial Services, LLC	Fairfax	✓	✓	✓	✓
Mason Investment Advisory Services, Inc.	Reston	✓	✓	✓	✓
Signature Family Wealth Advisors	Norfolk		✓	✓	✓
Sullivan, Bruyette, Speros & Blayney, LLC	McLean		✓	✓	✓
The Capital Management Corporation	Glen Allen	✓	✓	✓	✓
WASHINGTON					
Brighton Jones	Seattle	✓	✓	✓	✓
Coldstream Wealth Management	Bellevue	✓	✓	✓	✓
Empirical Wealth Management	Seattle	✓	✓	✓	✓
Evergreen Gavekal	Bellevue	✓	✓	✓	✓
Fisher Investments	Camas	✓	✓	✓	✓
Garde Capital	Seattle		✓	✓	✓
Merriman Wealth Management	Seattle	✓	✓	✓	
Petersen Hastings Investment Management	Kennewick	✓	✓	✓	✓
WISCONSIN					
Advisors' Pride, Inc.	Appleton	✓	✓	✓	✓
Annex Wealth Management, LLC	Elm Grove	✓	✓	✓	✓
Cleary Gull Advisors, a Johnson Financial Group Company	Milwaukee	✓	✓	✓	✓
Heck Capital Advisors	Rhineland	✓	✓	✓	✓
Sadoff Investment Management	Milwaukee	✓	✓	✓	✓
SVA Plumb Wealth Management, LLC	Madison	✓	✓	✓	✓