

RIA LEADERS 2023: TOP 150 FEE-ONLY RIA FIRMS

Data partner COMPLY produced the below rankings of fee-only registered investment advisors that provide financial planning services from SEC Form ADV filings this summer using criteria designed by Financial Planning.

RANK	FIRM NAME	LOCATION	AUM	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
1	Chevy Chase Trust Company	Bethesda, MD	\$32,026,434,099	4695	34	103
2	Moneta Group Investment Advisors	St. Louis, MO	\$30,651,380,206	37339	188	460
3	Pathstone	Englewood, NJ	\$24,835,859,938	18943	85	297
4	Bahl & Gaynor	Cincinnati, OH	\$17,458,051,631	2711	0	41
5	Cap Strat	Oakbrook Terrace, IL	\$17,278,852,363	1013	6	25
6	EP Wealth Advisors	Torrance, CA	\$17,057,000,000	32050	176	375
7	Savant Wealth Management	Rockford, IL	\$17,004,544,269	10992	143	333
8	Advanced Research Investment Solutions	Los Angeles, CA	\$14,734,866,934	362	3	7
9	Aspiriant	Los Angeles, CA	\$13,118,061,000	10745	62	197
10	FCI Advisors	Overland Park, KS	\$12,844,217,759	13818	41	67
11	Homrich Berg	Atlanta, GA	\$12,528,313,663	15429	64	171
12	WE Family Offices	Miami, FL	\$12,056,434,282	106	30	49
13	Fiduciary Counselling	St Paul, MN	\$11,563,849,942	1667	18	84
14	Clearstead; Hartland	Cleveland, OH	\$10,227,847,468	5102	11	126
15	Loring, Wolcott & Coolidge Fiduciary Advisors	Boston, MA	\$9,688,406,762	3288	11	104
16	Ballentine Partners	Waltham, MA	\$9,287,163,956	5764	74	89
17	Ira Group	Atlanta, GA	\$9,075,041,999	568	12	16
18	The Mather Group	Chicago, IL	\$8,718,717,623	16761	88	167
19	CV Advisors	Aventura, FL	\$8,415,385,935	1806	0	45
20	Mill Creek Capital Advisors	Conshohocken, PA	\$7,876,358,125	385	24	39
21	Ferguson Wellman Capital Management	Portland, OR	\$7,145,593,038	3808	23	55
22	Valeo Financial Advisors	Carmel, IN	\$7,103,709,028	15757	85	161
23	Conrad Siegel Investment Advisors	Harrisburg, PA	\$6,987,640,642	873	25	26
24	Modera Wealth Management	Westwood, NJ	\$6,800,794,762	10050	70	111
25	Seven Post Investment Office	San Francisco, CA	\$6,745,239,228	212	14	21

RANK	FIRM NAME	LOCATION	AUM	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
26	Columbia Pacific Wealth Management	Seattle, WA	\$6,692,219,926	6489	30	44
27	Pinnacle Associates	New York, NY	\$6,594,758,482	5378	19	58
28	Circle Wealth Management	Summit, NJ	\$6,551,177,169	1235	9	16
29	Wetherby Asset Management	San Francisco, CA	\$6,531,453,415	3790	26	89
30	Ropes Wealth Advisors	Boston, MA	\$6,468,204,099	3632	9	41
31	Greycourt	Pittsburgh, PA	\$6,402,799,160	41	1	43
32	Orgel Wealth Management	Altoona, WI	\$6,255,250,814	9697	26	75
33	H.M. Payson	Portland, ME	\$6,182,778,190	3724	15	32
34	Coho Partners	Berwyn, PA	\$6,165,300,000	1323	2	33
35	Guided Choice Asset Management	Reno, NV	\$6,107,388,811	106443	0	26
36	Arlington Partners	Birmingham, AL	\$6,097,070,330	978	16	39
37	Altair Advisers	Chicago, IL	\$6,014,189,352	864	0	65
38	Greenspring Advisors	Towson, MD	\$6,000,116,360	4807	23	41
39	Frontier Asset Management	Sheridan, WY	\$5,945,548,711	4289	11	50
40	Aureus Asset Management	Boston, MA	\$5,904,645,867	798	3	14
41	R.M. Davis	Portland, ME	\$5,757,647,950	5599	18	55
42	East End Advisors	New York, NY	\$5,746,160,810	36	0	18
43	Parallel Advisors	San Francisco, CA	\$5,708,131,871	12629	43	91
44	Soltis Investment Advisors	St. George, UT	\$5,644,684,596	3387	36	56
45	Bradley Foster & Sargent	Hartford, CT	\$5,627,929,963	4295	9	48
46	Heck Capital Advisors	Rhineland, WI	\$5,620,331,499	3475	17	21
47	Plancorp	Saint Louis, MO	\$5,545,417,718	6315	36	76
48	Northwest Capital Management	Lake Oswego, OR	\$5,476,500,419	995	8	17
49	Clear Investment Research	Alpharetta, GA	\$5,244,653,328	219	3	5
50	The Bollard Group	Boston, MA	\$5,215,718,144	473	1	28

RANK	FIRM NAME	LOCATION	AUM	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
51	KCM Investment Advisors	Greenbrae, CA	\$5,181,125,856	3508	6	20
52	WMS Partners	Towson, MD	\$5,162,519,390	690	39	86
53	Congress Wealth Management	Boston, MA	\$5,144,514,705	10485	36	70
54	Sepio Capital	Salt Lake City, UT	\$5,059,745,774	2315	19	29
55	Mission Wealth Management	Santa Barbara, CA	\$4,975,561,347	7755	56	87
56	Zhang Financial	Portage, MI	\$4,792,683,145	5720	16	40
57	Pure Financial Advisors	San Diego, CA	\$4,600,614,925	14757	46	123
58	JMG Financial Group	Downers Grove, IL	\$4,500,738,000	4560	38	64
59	Evanson Asset Management	Monterey, CA	\$4,364,339,196	4458	6	6
60	Balentine	Atlanta, GA	\$4,360,779,247	5452	1	53
61	Index Fund Advisors	Irvine, CA	\$4,353,562,326	6756	16	50
62	F.L. Putnam Investment Management	Wellesley, MA	\$4,302,700,958	4312	35	84
63	Capital Advisors	Tulsa, OK	\$4,258,161,897	2625	34	59
64	Iron Capital Advisors	Atlanta, GA	\$4,225,024,305	174	2	6
65	Andersen	McLean, VA	\$4,217,211,000	413	9	1511
66	Truepoint	Cincinnati, OH	\$4,210,571,024	8663	34	81
67	Permanens Capital	Charleston, SC	\$4,193,707,521	47	0	16
68	Alesco Advisors	Pittsford, NY	\$4,187,470,806	1554	14	27
69	Finaccess Advisors	Miami, FL	\$4,139,672,984	171	7	12
70	Stonegate Investment Group	Birmingham, AL	\$4,123,618,203	2425	11	13
71	Laird Norton Wealth Management	Seattle, WA	\$4,060,993,183	2706	35	97
72	Moran Wealth Management	Naples, FL	\$4,052,369,937	11190	20	37
73	Becker Capital Management	Portland, OR	\$3,906,617,526	1730	17	33
74	Evergreen Capital Management	Bellevue, WA	\$3,862,918,534	2659	19	35
75	Hamilton Capital	Columbus, OH	\$3,757,878,034	7905	46	69

RANK	FIRM NAME	LOCATION	AUM	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
76	Brownson, Rehmus & Foxworth	Chicago, IL	\$3,722,142,436	3467	15	24
77	The Clarius Group	Seattle, WA	\$3,721,039,806	968	15	35
78	Northeast Financial	Westport, CT	\$3,702,741,772	1557	2	8
79	Boston Financial Management	Boston, MA	\$3,682,804,638	2820	24	51
80	Veratis Advisors	Cary, NC	\$3,681,294,980	437	2	7
81	Crestone Asset Management	Boulder, CO	\$3,646,520,228	735	23	56
82	Certuity	North Palm Beach, FL	\$3,641,794,448	3774	18	32
83	IWP Wealth Management	Denver, CO	\$3,630,643,953	63	10	25
84	Clifford Swan Investment Counselors	Pasadena, CA	\$3,630,129,062	2574	12	31
85	Advance Capital Management	Southfield, MI	\$3,569,927,529	13699	29	54
86	Westmount Asset Management	Los Angeles, CA	\$3,565,626,032	4348	20	39
87	Callan Family Office	Radnor, PA	\$3,540,967,576	947	0	30
88	Mainstay Capital Management	Grand Blanc, MI	\$3,536,553,016	3718	14	30
89	Carnegie Investment Counsel	Pepper Pike, OH	\$3,470,336,580	6883	34	54
90	TCI Wealth Advisors	Tucson, AZ	\$3,431,526,695	9496	28	54
91	Buckhead Capital Management	Atlanta, GA	\$3,425,795,569	259	9	14
92	Wescott Financial Advisory Group	Philadelphia, PA	\$3,386,326,881	3306	26	51
93	Willis Investment Counsel	Gainesville, GA	\$3,381,042,293	436	4	11
94	TFO Phoenix	Phoenix, AZ	\$3,340,454,739	1685	27	64
95	Moss Adams Wealth Advisors	Seattle, WA	\$3,333,840,032	4118	22	67
96	SYM Financial Advisors	Winona Lake, IN	\$3,330,241,056	4634	28	67
97	Prio Wealth	Boston, MA	\$3,288,110,373	1765	11	28
98	Dynamic Wealth Advisors	Phoenix, AZ	\$3,252,482,987	12207	72	120
99	Reynders, Mcveigh Capital Management	Boston, MA	\$3,240,827,048	817	20	35
100	Southeast Asset Advisors	Thomasville, GA	\$3,239,114,249	1296	9	15

RANK	FIRM NAME	LOCATION	AUM	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
101	Matter Family Office	Clayton, MO	\$3,212,104,878	258	15	44
102	Destination Wealth Management	Walnut Creek, CA	\$3,211,516,711	5463	32	51
103	Heritage Investors Management	Bethesda, MD	\$3,126,801,088	1389	6	16
104	Foster Group	West Des Moines, IA	\$3,083,295,163	5768	41	75
105	Heritage Wealth Advisors	Richmond, VA	\$3,081,765,406	1345	14	30
106	Constellation Wealth Advisors	Cincinnati, OH	\$3,047,335,087	1975	17	30
107	The Pacific Financial Group	Bellevue, WA	\$3,039,889,861	19568	37	85
108	Sand Hill Global Advisors	Palo Alto, CA	\$3,037,936,441	1866	14	32
109	Roosevelt Investments	New York, NY	\$3,017,850,156	4799	10	29
110	Twin Focus Capital Partners	Boston, MA	\$3,008,921,376	75	10	35
111	True North Advisors	Dallas, TX	\$3,006,399,719	3532	18	42
112	Salem Investment Counselors	Winston Salem, NC	\$2,995,104,546	2704	8	20
113	CM Wealth Advisors	Beachwood, OH	\$2,984,526,622	558	4	22
114	ZWJ Investment Counsel	Atlanta, GA	\$2,968,295,859	2295	11	17
115	Lindbrook Capital	Calabasas, CA	\$2,968,250,317	2468	8	10
116	Accredited Investors Wealth Management	Edina, MN	\$2,956,361,600	4410	4	54
117	Mozaic	Beverly Hills, CA	\$2,896,976,167	78	0	15
118	Paul Comstock Partners	Houston, TX	\$2,857,791,123	110	9	14
119	Abacus Wealth Partners	Santa Monica, CA	\$2,834,445,228	5553	57	71
120	Winthrop Capital Management	Carmel, IN	\$2,833,486,915	751	4	26
121	Verdence Capital Advisors	Hunt Valley, MD	\$2,735,788,731	5301	25	40
122	Halbert Hargrove	Long Beach, CA	\$2,735,028,599	4240	33	47
123	Yale Capital	St. Petersburg, FL	\$2,722,853,689	120	4	7
124	Smith Salley Wealth Management	Greensboro, NC	\$2,709,592,506	2136	15	17
125	Sage Financial Group	West Conshohocken, PA	\$2,701,612,545	3567	20	27

RANK	FIRM NAME	LOCATION	AUM	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
126	Three Bell Capital	Los Altos, CA	\$2,700,919,456	511	10	19
127	Anchor Capital Advisors	Boston, MA	\$2,684,023,586	3647	17	48
128	Stelac Advisory Services	New York, NY	\$2,669,168,072	470	2	24
129	Evensky & Katz/Foldes Wealth Management	Coral Gables, FL	\$2,640,714,946	5063	19	38
130	Cardea Capital Group	Atlanta, GA	\$2,633,802,310	82	3	5
131	Envoi	Minneapolis, MN	\$2,587,439,852	1438	7	12
132	Dakota Wealth	Palm Beach Gardens, FL	\$2,548,153,882	4748	38	57
133	The Welch Group	Birmingham, AL	\$2,522,233,225	3519	20	25
134	Wealthspire Advisors	San Rafael, CA	\$2,453,163,396	934	23	44
135	Morton Wealth	Calabasas, CA	\$2,377,712,772	3420	26	53
136	Goelzer Investment Management	Indianapolis, IN	\$2,360,180,745	1579	24	37
137	New England Private Wealth Advisors	Wellesley, MA	\$2,359,399,566	2647	7	19
138	Wealth Management	Norfolk, NE	\$2,348,931,303	3334	44	60
139	Steele Capital Management	Dubuque, IA	\$2,330,408,674	3911	11	14
140	North Star Asset Management	Neenah, WI	\$2,324,356,049	3098	0	18
141	Biltmore Family Office	Charlotte, NC	\$2,322,649,734	959	15	21
142	Resource Consulting Group	Orlando, FL	\$2,316,717,571	2792	16	22
143	Donaldson Capital Management	Evansville, IN	\$2,310,717,134	1469	32	58
144	BIP Wealth	Atlanta, GA	\$2,310,141,037	5902	27	49
145	Waters, Parkerson	New Orleans, LA	\$2,302,559,870	1808	6	12
146	Advus Financial Partners	Lake Mary, FL	\$2,287,801,345	1042	11	18
147	Bogart Wealth	McLean, VA	\$2,282,219,691	6056	13	28
148	Chicago Capital	Chicago, IL	\$2,257,867,241	1514	6	11
149	Pittenger & Anderson	Lincoln, NE	\$2,256,261,817	1855	13	13
150	Cobblestone Capital Advisors	Rochester, NY	\$2,253,449,018	2906	20	41