

FT 300

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

Firm name	City	Client segments served			
		Retail (individuals with <\$1m)	HNW (individuals with \$1m – \$10m)	Ultra HNW (individuals with \$10m +)	Institutional
Alaska					
Alaska Permanent Capital Management	Anchorage		✓		✓
Arizona					
Miller Russell Associates	Phoenix	✓	✓	✓	✓
TCI Wealth Advisors, Inc.	Tucson	✓	✓	✓	✓
TFO Phoenix	Phoenix	✓	✓	✓	✓
United Planners Financial Services of America	Scottsdale	✓	✓	✓	✓
California					
AMI Asset Management Corporation	Los Angeles		✓	✓	✓
Aspiriant	Los Angeles		✓	✓	✓
Atherton Lane Advisers LLC	Menlo Park	✓	✓	✓	✓
Baker Street Advisors, LLC	San Francisco		✓	✓	✓

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Beacon Pointe Advisors	Newport Beach	✓	✓	✓	✓
Brouwer & Janachowski LLC	Tiburon	✓	✓	✓	✓
California Financial Advisors	San Ramon	✓	✓		
Cardiff Park Advisors	Carlsbad	✓	✓	✓	✓
Churchill Management Group	Los Angeles	✓	✓	✓	✓
Clifford Swan Investment Counsel	Pasadena	✓	✓	✓	✓
Destination Wealth Management	Walnut Creek	✓	✓	✓	✓
Dowling & Yahnke, LLC	San Diego	✓	✓	✓	✓
First Republic Investment Management, Inc.	San Francisco	✓	✓	✓	✓
Gemmer Asset Management LLC	Walnut Creek	✓	✓	✓	✓
Genovese Burford & Brothers	Sacramento	✓	✓	✓	✓
Golub Group, LLC	San Mateo	✓	✓	✓	✓
Halbert Hargrove	Long Beach	✓	✓	✓	✓
Hanson McClain Advisors	Sacramento	✓	✓		✓

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Kayne Anderson Rudnick Investment Management	Los Angeles	✓	✓	✓	✓	Singer Xenos Wealth Management	Coral Gables	✓	✓	✓	✓
KCM Investment Advisors LLC	San Rafael	✓	✓	✓	✓	Wasmer, Schroeder & Company	Naples	✓	✓	✓	✓
Litman Gregory Asset Management	Larkspur	✓	✓	✓	✓	WaterOak Advisors	Winter Park	✓	✓	✓	✓
Loring Ward	San Jose	✓	✓	✓	✓	WE Family Offices	Miami			✓	
LourdMurray	Beverly Hills	✓	✓	✓	✓						
Mission Wealth Management, LLC	Santa Barbara	✓	✓	✓	✓	Georgia					
Morton Capital Management	Calabasas	✓	✓	✓	✓	Arcus Capital Partners LLC	Atlanta	✓	✓	✓	✓
Osborne Partners Capital Management, LLC	San Francisco		✓	✓	✓	Asset Preservation Advisors	Atlanta			✓	
Pence Wealth Management	Newport Beach	✓	✓	✓		Balentine	Atlanta	✓	✓	✓	✓
Pillar Pacific Capital Management, LLC	Daly City	✓	✓	✓	✓	Brightworth	Atlanta	✓	✓	✓	✓
PlanMember Securities Corporation	Carpinteria	✓			✓	CornerCap Investment Counsel	Atlanta	✓	✓	✓	✓
Pure Financial Advisors, Inc.	San Diego	✓	✓	✓		Crawford Investment Counsel, Inc.	Atlanta	✓	✓	✓	✓
Quantum Capital Management	San Francisco	✓	✓	✓	✓	GV Financial Advisors	Atlanta		✓	✓	✓
Rand & Associates	San Francisco	✓	✓	✓	✓	Henssler Financial	Kennesaw	✓	✓	✓	✓
Sand Hill Global Advisors	Palo Alto	✓	✓	✓	✓	Homrich Berg	Atlanta	✓	✓	✓	
Saratoga Research & Investment Management	Saratoga	✓	✓	✓	✓	SignatureFD, LLC	Atlanta	✓	✓	✓	✓
Scharf Investments LLC	Scotts Valley	✓	✓	✓	✓						
Signature Estate & Investment Advisors (SEIA)	Los Angeles	✓	✓	✓	✓	Hawaii					
The Advisory Group of San Francisco, LLC	San Francisco	✓	✓	✓	✓	CKW Financial Group	Honolulu	✓	✓	✓	✓
The Presidio Group	San Francisco			✓	✓						
The Sierra Group	Santa Monica	✓	✓	✓	✓	Idaho					
Thomas Wirig Doll	Walnut Creek	✓	✓	✓	✓	Yellowstone Partners	Idaho Falls	✓	✓	✓	✓
United Capital Financial Advisers, LLC	Newport Beach	✓	✓	✓	✓						
Vista Wealth Management, LLC	Palo Alto	✓	✓	✓		Illinois					
Washington Wealth Management	San Diego	✓	✓		✓	Altair Advisers, LLC	Chicago		✓	✓	✓
WESCAP Group	Burbank	✓	✓	✓	✓	Balasa Dinverno Foltz LLC	Itasca	✓	✓	✓	✓
Westmount Asset Management, LLC	Los Angeles	✓	✓	✓	✓	Brookstone Capital Management, LLC	Wheaton	✓	✓		✓
Wetherby Asset Management	San Francisco	✓	✓	✓	✓	Cedar Hill Associates, LLC	Chicago	✓	✓	✓	✓
Willow Creek Wealth Management Inc.	Sebastopol	✓	✓	✓	✓	Chesley, Taft & Associates, LLC	Chicago		✓	✓	✓
						Chicago Partners Wealth Advisors	Chicago	✓	✓	✓	✓
Colorado						Cozad Asset Management, Inc.	Champaign	✓	✓	✓	✓
BRC Investment Management LLC	Greenwood Village	✓	✓		✓	Embree Financial Group	Chicago	✓	✓		✓
BSW Wealth Partners	Boulder	✓	✓	✓		Geneva Advisors	Chicago	✓	✓	✓	✓
Capital Investment Counsel	Denver	✓	✓	✓	✓	Great Lakes Advisors	Chicago	✓	✓	✓	✓
Crestone Capital Advisors LLC	Boulder		✓	✓		HighPoint Planning Partners	Downers Grove	✓	✓	✓	✓
Sargent Bickham Lagudis, LLC	Boulder	✓	✓	✓	✓	HighTower's The Lerner Group	Deerfield	✓	✓	✓	✓
						IPI Wealth Management, Inc.	Decatur	✓	✓	✓	✓
Connecticut						JMG Financial Group, Ltd.	Oak Brook	✓	✓	✓	
Beirne Wealth Consulting Services, LLC	Milford	✓	✓	✓	✓	Kovitz Investment Group, LLC	Chicago	✓	✓	✓	✓
Bradley, Foster & Sargent, Inc.	Hartford	✓	✓	✓	✓	Leonetti & Associates, LLC	Buffalo Grove	✓	✓	✓	✓
Essex Financial Services	Essex	✓	✓	✓	✓	Mid-Continent Capital, LLC	Chicago		✓	✓	✓
Fieldpoint Private	Greenwich		✓	✓	✓	Pekin Singer Strauss Asset Management	Chicago	✓	✓	✓	
Greenwich Wealth Management	Greenwich	✓	✓	✓	✓	Relative Value Partners LLC	Northbrook	✓	✓	✓	✓
NorthCoast Asset Management	Greenwich	✓	✓	✓	✓	RMB Capital	Chicago	✓	✓	✓	✓
Resnick Investment Advisors, LLC	Westport	✓	✓	✓	✓	Savant Capital Management	Rockford	✓	✓	✓	✓
						Strategic Wealth Partners LLC	Deerfield	✓	✓	✓	✓
Delaware						Whitnell & Co.	Oak Brook	✓	✓	✓	
Capital Markets IQ	Wilmington	✓	✓	✓	✓						
						Indiana					
District of Columbia						Bedel Financial Consulting, Inc.	Indianapolis	✓	✓		✓
Avenir Corporation	Washington	✓	✓	✓	✓	Column Capital	Indianapolis	✓	✓	✓	
Farr, Miller & Washington, LLC	Washington		✓	✓	✓	Donaldson Capital Management, LLC	Evansville	✓	✓	✓	✓
Marshfield Associates	Washington	✓	✓	✓	✓	Oxford Financial Group, Ltd.	Indianapolis	✓	✓	✓	✓
						Phillips Financial Management, LLC	Fort Wayne	✓	✓	✓	✓
Florida						Valeo Financial Advisors, LLC	Indianapolis	✓	✓	✓	✓
Banyan Partners LLC	Palm Beach Gardens	✓	✓	✓	✓						
Bott-Anderson Partners, Inc.	Jacksonville		✓	✓	✓	Iowa					
Cumberland Advisors	Sarasota	✓	✓	✓	✓	Honkamp Krueger Financial Services, Inc.	Dubuque	✓	✓	✓	✓
Evensky & Katz LLC	Coral Gables	✓	✓	✓	✓	Steele Capital Management, Inc.	Dubuque	✓	✓	✓	✓
Foldes Financial Management	Miami	✓	✓		✓						
GenSpring Family Offices	Jupiter		✓	✓	✓	Kansas					
Global Financial Private Capital, LLC	Sarasota	✓	✓		✓	Creative Planning, Inc.	Leawood	✓	✓	✓	✓
Investacorp Advisory Services, Inc.	Miami	✓	✓	✓	✓	Vantage Investment Partners, LLC	Merriam	✓	✓	✓	✓
Investor Solutions, Inc.	Coconut Grove	✓	✓		✓						
Palisades Hudson Asset Management, L.P.	Fort Lauderdale	✓	✓	✓		Kentucky					
ProVise Management Group, LLC	Clearwater	✓	✓	✓	✓	ARGI Investment Services	Louisville				

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MCF Advisors	Covington	✓	✓	✓	✓	Lawson Kroeker Investment Management	Omaha	✓	✓	✓	✓
Louisiana						New Jersey					
Resource Management, LLC	Metairie	✓	✓	✓	✓	Condor Capital Management	Martinsville	✓	✓	✓	✓
St. Denis J. Villere & Co. LLC	New Orleans	✓	✓	✓	✓	Massey, Quick & Co. LLC	Morristown	✓	✓	✓	✓
Maryland						Meyer Capital Group	Marlton	✓	✓	✓	✓
Baltimore Washington Financial Advisors	Columbia	✓	✓	✓	✓	Modera Wealth Management	Westwood	✓	✓	✓	✓
Chevy Chase Trust	Bethesda	✓	✓	✓		Pathstone Family Office	Fort Lee	✓	✓	✓	✓
Convergent Wealth Advisors	Potomac		✓	✓	✓	Private Advisor Group	Morristown	✓	✓	✓	✓
FBB Capital Partners	Bethesda	✓	✓	✓		RegentAtlantic	Morristown	✓	✓	✓	✓
Heritage Investors Management Corp.	Bethesda	✓	✓	✓	✓	The MDE Group	Morristown		✓	✓	✓
Highline Wealth Management, LLC	Rockville		✓	✓	✓	New York					
HighTower Bethesda	Bethesda	✓	✓	✓	✓	Alesco Advisors LLC	Pittsford	✓	✓	✓	✓
HighTower's Kelly Wealth Management	Hunt Valley	✓	✓	✓	✓	Altfest Personal Wealth Management	New York	✓	✓	✓	
Maryland Capital Management	Baltimore	✓	✓	✓	✓	Barrett Asset Management LLC	New York		✓	✓	✓
Pinnacle Advisory Group, Inc.	Columbia	✓	✓	✓	✓	Bridgewater Advisors Inc.	New York	✓	✓	✓	✓
Retirement Management Systems	Annapolis	✓	✓			Capital Counsel LLC	New York		✓		✓
WMS Partners, LLC	Towson	✓	✓	✓		Clarfeld	Tarrytown		✓	✓	✓
Massachusetts						Constellation Wealth Advisors LLC	New York		✓	✓	✓
Adviser Investments	Newton	✓	✓	✓	✓	Courier Capital Corporation	Buffalo	✓	✓	✓	✓
Athena Capital Advisors LLC	Lincoln			✓	✓	Douglas C. Lane & Associates, Inc.	New York	✓	✓	✓	✓
Baldwin Brothers, Inc.	Marion		✓	✓	✓	Douglass Winthrop Advisors LLC	New York		✓	✓	✓
Ballentine Partners, LLC	Waltham	✓	✓	✓	✓	Dynasty Wealth Management, LLC	New York		✓	✓	
Breckinridge Capital Advisors	Boston	✓	✓	✓	✓	Edge Wealth Management LLC	New York	✓	✓	✓	✓
Choate Investment Advisors LLC	Boston	✓	✓	✓	✓	Evercore Wealth Management	New York		✓	✓	✓
Federal Street Advisors, Inc.	Boston	✓	✓	✓	✓	Geller Family Office Services, LLC	New York			✓	✓
Grimes & Company, Inc.	Westborough	✓	✓	✓		Gerstein Fisher	New York	✓	✓	✓	✓
Kaplan Financial Services, Inc.	Newton	✓	✓	✓		HighTower's HSW Advisors	New York		✓	✓	✓
Reynders, McVeigh Capital Management, LLC	Boston	✓	✓	✓	✓	Highmount Capital	New York		✓	✓	
SCS Financial	Boston			✓	✓	HighTower's Morse, Towey & White Group	New York	✓	✓	✓	
The Colony Group, LLC	Boston	✓	✓	✓		Ingalls & Snyder LLC	New York	✓	✓	✓	✓
Welch & Forbes LLC	Boston	✓	✓	✓	✓	Joel Isaacson & Co., LLC	New York		✓	✓	
Wellesley Investment Advisors	Wellesley	✓	✓	✓	✓	Klingman & Associates, LLC	New York	✓	✓	✓	✓
Michigan						Linden Global Strategies LLC	New York		✓	✓	✓
Flexible Plan Investments, Ltd.	Bloomfield Hills	✓	✓		✓	LVW Advisors, LLC	Pittsford		✓	✓	✓
LJPR, LLC	Troy	✓	✓		✓	M. Griffith Investment Services, Inc.	New Hartford	✓	✓	✓	✓
Mainstay Capital Management, LLC	Grand Blanc	✓	✓	✓		Matrix Asset Advisors, Inc.	New York	✓	✓	✓	✓
Rehmann Financial	Lansing	✓	✓	✓	✓	Nottingham Advisors	Buffalo	✓	✓	✓	✓
Retirement Income Solutions, Inc.	Ann Arbor	✓	✓		✓	Offit Capital	New York		✓	✓	✓
Telemus Capital, LLC	Southfield		✓	✓	✓	Schafer Cullen Capital Management, Inc.	New York	✓	✓	✓	✓
Minnesota						Silvercrest Asset Management	New York	✓	✓	✓	✓
JNBA Financial Advisors	Minneapolis	✓	✓	✓	✓	Sontag Advisory	New York	✓	✓	✓	✓
Minneapolis Portfolio Management Group LLC	Minneapolis	✓	✓		✓	TAG Associates, LLC	New York			✓	✓
Riverbridge Partners, LLC	Minneapolis	✓	✓	✓	✓	The Portfolio Strategy Group, LLC	White Plains	✓	✓	✓	✓
Windsor Financial Group, LLC	Minneapolis	✓	✓	✓	✓	Tiedemann Wealth Management	New York		✓	✓	✓
Mississippi						Tirschwell & Loewy, Inc.	New York		✓	✓	
Medley & Brown	Jackson	✓	✓	✓	✓	North Carolina					
Missouri						Carroll Financial Associates, Inc.	Charlotte	✓	✓	✓	✓
Acropolis Investment Management, LLC	Chesterfield	✓	✓	✓	✓	Horizon Investments	Charlotte	✓			✓
BKD Wealth Advisors, LLC	Springfield	✓	✓	✓	✓	Novare Capital Management	Charlotte	✓	✓	✓	
Matter Family Office	St. Louis		✓	✓		Parsec Financial	Asheville	✓	✓	✓	
Moneta Group Investment Advisors, LLC	Clayton		✓	✓	✓	Stearns Financial Group	Greensboro	✓	✓	✓	✓
Plancorp, LLC	St. Louis	✓	✓	✓	✓	Ohio					
Zemenick & Walker, Inc.	Clayton	✓	✓	✓	✓	Bahl & Gaynor Investment Counsel	Cincinnati	✓	✓	✓	✓
Montana						Bartlett & Co., LLC	Cincinnati	✓	✓	✓	✓
Stack Financial Management	Whitefish	✓	✓	✓	✓	Budros, Ruhlín & Roe, Inc.	Columbus	✓	✓	✓	✓
Nebraska						Carnegie Investment Counsel	Beachwood	✓	✓	✓	✓
Carson Wealth Management Group	Omaha	✓	✓	✓		Foster & Motley, Inc.	Cincinnati	✓	✓	✓	✓
						Hamilton Capital Management, Inc.	Columbus	✓	✓	✓	✓
						Johnson Investment Counsel	Cincinnati	✓	✓	✓	✓
						McDonald Partners, LLC	Cleveland	✓	✓	✓	✓
						OBS Financial Advisors, Inc.	Whitehouse	✓	✓		✓
						RiverPoint Capital Management	Cincinnati	✓	✓	✓	✓

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Spero-Smith Investment Advisers, Inc.	Cleveland	✓	✓	✓	✓
Summit Financial Strategies, Inc.	Columbus	✓	✓	✓	✓
Truepoint Wealth Counsel	Cincinnati	✓	✓	✓	✓
Oklahoma					
Capital Advisors, Inc.	Tulsa	✓	✓	✓	✓
Exencial Wealth Advisors	Oklahoma City	✓	✓	✓	✓
Tom Johnson Investment Management, LLC	Oklahoma City	✓	✓		✓
Oregon					
Ferguson Wellman Capital Management	Portland	✓	✓	✓	✓
Northside Capital Management, LLC	Hood River		✓	✓	
Vision Capital Management, Inc.	Portland	✓	✓		✓
Pennsylvania					
Cornerstone Advisors Asset Management, Inc.	Bethlehem		✓	✓	✓
Fort Pitt Capital Group	Pittsburgh	✓	✓	✓	✓
Fragasso Financial Advisors	Pittsburgh	✓	✓	✓	✓
HBKS Wealth Advisors	Erie	✓	✓	✓	✓
Logan Capital Management, Inc.	Ardmore	✓	✓	✓	✓
Mill Creek Capital Advisors, LLC	Conshohocken	✓	✓	✓	✓
myCIO Wealth Partners, LLC	Philadelphia	✓	✓	✓	✓
Palladiem, LLC	Malvern		✓		✓
Prudent Management Associates	Philadelphia		✓	✓	✓
Sage Financial Group	Conshohocken	✓	✓	✓	
Schneider Downs Wealth Management Advisors, LP	Pittsburgh	✓	✓	✓	✓
Tower Bridge Advisors	Conshohocken	✓	✓	✓	✓
Veritable, L.P.	Newtown Square		✓	✓	
Wescott Financial Advisory Group LLC	Philadelphia	✓	✓	✓	✓
XPYRIA Investment Advisors	Pittsburgh	✓	✓	✓	✓
Rhode Island					
Endurance Wealth Management	Providence		✓	✓	✓
Professional Planning Group	Westerly	✓	✓	✓	✓
Tennessee					
CapWealth Advisors	Franklin	✓	✓	✓	✓
Highland Capital Management, LLC	Memphis	✓	✓	✓	✓
Legacy Wealth Management	Memphis	✓	✓	✓	✓
TrustCore	Brentwood	✓	✓	✓	✓
Texas					
Covenant Multifamily Office LLC	San Antonio	✓	✓	✓	✓
Money Matters with Ken Moraif	Plano	✓	✓		

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Retirement Advisors of America	Addison	✓	✓		
Sendero Wealth Management	San Antonio	✓	✓	✓	✓
SFMG Wealth Advisors	Plano	✓	✓	✓	
South Texas Money Management	San Antonio	✓	✓	✓	✓
Tanglewood Wealth Management, Inc.	Houston	✓	✓	✓	✓
True North Advisors	Dallas	✓	✓	✓	✓
Vermont					
Manchester Capital Management LLC	Manchester	✓	✓	✓	✓
Virginia					
Burney Company	Falls Church	✓	✓	✓	✓
Cassaday & Company, Inc.	McLean	✓	✓	✓	
Catawba Capital Management	Roanoke	✓	✓		✓
Edelman Financial Services LLC	Fairfax	✓	✓	✓	✓
Glassman Wealth Services	McLean	✓	✓	✓	✓
Mason Investment Advisory Services, Inc.	Reston	✓	✓	✓	✓
SIGNATURE.	Norfolk		✓	✓	✓
The London Company of Virginia, LLC	Richmond	✓	✓	✓	✓
West Financial Services, Inc.	McLean	✓	✓	✓	✓
Wilbanks Smith & Thomas Asset Management, LLC	Norfolk	✓	✓	✓	✓
Washington					
Badgley Phelps Investment Managers	Seattle	✓	✓	✓	✓
Brighton Jones	Seattle	✓	✓	✓	✓
Bristlecone Advisors, LLC	Seattle		✓	✓	✓
Empirical Wealth Management	Seattle	✓	✓	✓	
Evergreen Capital	Bellevue	✓	✓	✓	
Fisher Investments	Camas	✓	✓	✓	✓
Freestone Capital Management	Seattle	✓	✓	✓	✓
Laird Norton Wealth Management	Seattle		✓	✓	✓
Merriman Wealth Management, LLC	Seattle	✓	✓	✓	
SNW Asset Management	Seattle		✓		✓
Threshold Group	Gig Harbor		✓	✓	✓
Wisconsin					
Annex Wealth Management, LLC	Elm Grove	✓	✓		✓
Cleary Gull	Milwaukee	✓	✓	✓	✓
Diversified Management, Inc.	Milwaukee	✓	✓	✓	
Orgel Wealth Management	Altoona	✓	✓	✓	✓
Sadoff Investment Management	Milwaukee	✓	✓		✓