RIA LEADERS 2026: TOP 150 FEE-ONLY RIA FIRMS

Data partner FINTRX produced the rankings of U.S.-based fee-only registered investment advisors that provide financial planning services based on SEC Form ADV filings as of Aug. 28, using criteria designed by Financial Planning. (NA = not available)

RANK	FIRM NAME	LOCATION	AUM	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
1	IEQ Capital	Foster City, CA	$56,765,635,111	2,309	83	266
2	Savant Wealth Management	Rockford, IL	$55,607,787,559	81,840	309	659
3	Moneta Group Investment Advisors	St. Louis	$50,536,192,552	48,410	165	585
4	EP Wealth Advisors	Torrance, CA	$45,145,000,000	20,738	287	618
5	Chevy Chase Trust Company	Bethesda, MD	$44,925,270,699	5,097	32	119
6	BBR Partners	New York	$36,493,200,000	1,875	23	175
7	Clearstead Advisors	Cleveland	$33,880,026,978	14,707	44	280
8	HB Wealth	Atlanta	$30,158,401,942	26,148	104	325
9	Brighton Jones	Seattle	$18,879,719,548	3,808	96	316
10	Aspiriant	Los Angeles	$18,049,297,000	12,173	62	218
11	WE Family Offices	Coral Gables, FL	$17,752,394,957	112	13	65
12	Modera Wealth Management	Westwood, NJ	$17,678,214,162	21,420	89	238
13	Evoke Wealth	Los Angeles	$17,287,265,124	12,528	7	96
14	Mission Wealth Management	Santa Barbara, CA	$17,001,545,425	18,908	93	220
15	Investment Research & Advisory Group	Atlanta	$15,416,741,614	691	5	19
16	Ballentine Partners	Waltham, MA	$15,316,738,538	7,401	39	125
17	CV Advisors	Aventura, FL	$15,083,670,822	5,953	1	82
18	Pine Ridge Advisers	New York	$14,416,008,054	44	NA	14
19	Circle Wealth Management	Summit, NJ	$14,066,392,093	1,138	5	23
20	Gresham Partners	Chicago	$13,802,530,029	251	2	67
21	The Mather Group	Chicago	$13,446,388,872	15,200	66	186
22	Valeo Financial Advisors	Carmel, IN	$12,958,676,684	22,812	101	178
23	Loring, Wolcott & Coolidge Fiduciary Advisors	Boston	$12,835,550,894	3,293	5	109
24	The Caprock Group	Boise, ID	$12,479,071,631	436	23	67
25	Laird Norton Wetherby Wealth Management	Seattle	$12,183,776,067	6,041	38	169

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26	Soltis Investment Advisors	St. George, UT	$12,036,590,400	5,414	52	121
27	Heck Capital Advisors	Rhinelander, WI	$11,311,723,809	4,004	7	30
28	Bridges Investment Management	Omaha, NE	$11,307,553,900	3,175	12	79
29	Apella Capital	West Hartford, CT	$11,065,217,421	24,058	75	179
30	Pure Financial Advisors	San Diego	$11,054,059,366	7,509	75	204
31	Ferguson Wellman Capital Management	Portland, OR	$10,664,664,229	4,763	18	68
32	Plancorp	St. Louis	$10,634,525,882	9,200	39	112
33	Pinnacle Associates	New York	$10,386,022,125	6,766	29	69
34	Parallel Advisors	San Francisco	$10,307,545,581	4,242	65	137
35	Callan Family Office	Radnor, PA	$10,208,823,032	2,697	NA	49
36	Conrad Siegel Investment Advisors	Harrisburg, PA	$10,118,593,493	1,085	9	23
37	Fiduciary Counselling	St. Paul, MN	$10,056,745,777	1,761	8	87
38	Choate Investment Advisors	Boston	$10,047,919,310	4,009	6	34
39	Altair Advisers	Chicago	$9,759,855,198	1,016	NA	75
40	SignatureFD	Atlanta	$9,675,890,922	11,102	39	130
41	Seven Post Investment Office	San Francisco	$9,605,722,671	249	11	22
42	Orgel Wealth Management	Altoona, WI	$9,548,675,912	10,680	11	79
43	Composition Wealth	Los Angeles	$9,470,778,412	12,787	60	128
44	Bradley Foster & Sargent	Hartford, CT	$9,072,939,203	4,971	19	61
45	Guided Choice Asset Management	Reno, NV	$8,549,648,397	84,744	NA	22
46	Aureus Asset Management	Boston	$8,396,789,302	954	NA	14
47	Zhang Financial	Portage, MI	$8,370,163,197	7,855	10	50
48	R. M. Davis	Portland, ME	$8,154,674,961	6,124	16	63
49	Facet	West Palm Beach, FL	$7,603,700,943	43,934	73	238
50	Carnegie Capital Asset Management	Pepper Pike, OH	$7,513,187,008	8,541	29	69

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51	JMG Financial Group	Downers Grove, IL	$7,500,135,482	7,164	29	103
52	Evergreen Capital Management	Bellevue, WA	$7,185,104,271	3,404	12	37
53	Dakota Wealth	Palm Beach Gardens, FL	$6,941,956,964	11,161	47	91
54	Prowell Financial Management	Exton, PA	$6,863,569,821	404	2	4
55	The Bollard Group	Boston	$6,724,565,893	490	1	29
56	Aspen Grove Capital	Avon, CO	$6,669,946,419	3,287	1	22
57	Greycourt	Pittsburgh	$6,608,873,377	44	1	37
58	Greenspring Advisors	Towson, MD	$6,464,377,689	7,119	35	68
59	Truepoint	Blue Ash, OH	$6,392,730,954	9,643	30	103
60	Andersen Tax	McLean, VA	$6,348,792,000	579	19	2061
61	Stelac Advisory Services	New York	$6,286,367,512	690	1	21
62	KCM Investment Advisors	Greenbrae, CA	$6,018,305,492	3,432	6	20
63	Veratis Advisors	Cary, NC	$5,994,203,169	582	2	8
64	Westmount Partners	Los Angeles	$5,938,136,974	4,798	16	39
65	Index Fund Advisors	Irvine, CA	$5,929,710,382	6,664	8	50
66	GC Wealth Management	Cambridge, MA	$5,832,937,576	1,731	24	44
67	SYM Financial Advisors	Winona Lake, IN	$5,813,231,190	6,673	28	84
68	Moss Adams Wealth Advisors	Bellevue, WA	$5,773,272,462	4,790	17	59
69	Buckhead Capital Management	Atlanta	$5,758,236,630	365	9	13
70	Dynamic Advisor Solutions	Phoenix	$5,637,328,188	15,179	61	130
71	Balentine	Atlanta	$5,542,491,404	3,447	9	61
72	Stacey Braun Associates	New York	$5,500,200,000	1,091	NA	17
73	True North Advisors	Dallas	$5,422,653,468	5,298	23	89
74	Quadrant Capital Group	Cincinnati	$5,400,048,804	2,095	11	26
75	TCI Wealth Advisors	Tucson, AZ	$5,368,062,519	11,863	28	72

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76	Mainstay Capital Management	Grand Blanc, MI	$5,307,611,903	3,460	20	33
77	Eversource Wealth Advisors	Birmingham, AL	$5,095,829,877	13,689	60	76
78	Moran Wealth Management	Naples, FL	$5,095,822,670	12,260	18	56
79	New England Private Wealth Advisors	Wellesley, MA	$5,088,194,405	3,111	7	21
80	Pennington Partners & Company	Bethesda, MD	$5,087,641,631	1,026	4	36
81	Baker Avenue Asset Management	San Francisco	$5,086,036,641	3,690	23	57
82	Wellspring Financial Advisors	Cleveland	$5,055,010,974	2,051	8	31
83	Three Bell Capital	Dallas	$5,051,056,009	628	8	22
84	TFO Family Office Partners	Phoenix	$5,037,052,171	1,939	23	88
85	Advance Capital Management	Southfield, MI	$4,980,840,651	14,835	24	62
86	Destination Wealth Management	Walnut Creek, CA	$4,948,271,866	6,129	25	68
87	Yale Capital	St Petersburg, FL	$4,924,925,863	115	2	7
88	G10	Hunt Valley, MD	$4,906,344,778	179	NA	49
89	Heritage Wealth Advisors	Richmond, VA	$4,858,545,649	1,616	9	36
90	Chicago Capital	Chicago	$4,823,333,873	2,319	9	18
91	Brownson, Rehmus & Foxworth	Chicago	$4,788,226,880	3,489	10	26
92	Foster Group	West Des Moines, IA	$4,775,514,804	7,346	26	93
93	MCF Advisors	Lexington, KY	$4,684,530,591	7,540	22	55
94	Bragg Financial Advisors	Charlotte, NC	$4,671,122,824	1,613	14	39
95	Heritage Investors Management	Bethesda, MD	$4,632,533,441	1,465	7	22
96	Verdence Capital Advisors	Hunt Valley, MD	$4,627,407,651	7,802	27	52
97	Twin Focus Capital Partners	Boston	$4,584,699,376	77	6	37
98	Johnson Financial Group	Denver	$4,529,119,285	1,745	9	62
99	Goelzer Investment Management	Carmel, IN	$4,510,923,289	1,945	12	34
100	Clifford Swan Investment Counsel	Pasadena, CA	$4,482,345,088	2,598	12	40

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101	CX Institutional	Auburn, IN	$4,464,692,612	13,723	52	130
102	Accredited Investors	Edina, MN	$4,412,886,238	5,077	3	53
103	Sand Hill Global Advisors	Palo Alto, CA	$4,390,631,813	2,153	11	33
104	Sage Financial Group	West Conshohocken, PA	$4,291,847,204	4,334	15	28
105	Sage Mountain Advisors	Atlanta	$4,286,824,438	193	10	31
106	Reynders, Mcveigh Capital Management	Boston	$4,227,841,161	749	8	35
107	ZWJ Investment Counsel	Atlanta	$4,226,900,298	2,387	11	20
108	Willis Investment Counsel	Gainesville, FL	$4,225,943,233	568	2	13
109	Halbert Hargrove Global Advisors	Long Beach, CA	$4,203,912,885	4,932	24	52
110	Southeast Asset Advisors	Thomasville, GA	$4,199,822,999	1,356	7	14
111	Clear Investment Research	Alpharetta, GA	$4,191,639,011	277	2	5
112	Salem Investment Counselors	Winston Salem, NC	$4,188,070,791	3,120	9	18
113	Wescott Financial Advisory Group	Philadelphia	$4,155,788,050	3,365	16	48
114	Finaccess Advisors	Miami	$4,113,584,758	160	2	13
115	Gerber Kawasaki	Santa Monica, CA	$4,109,614,006	20,094	30	59
116	Performance Wealth Partners	Hinsdale, IL	$4,092,644,450	2,673	6	15
117	Permanens Capital	Charleston, SC	$4,017,549,299	65	3	17
118	Team Hewins	Foster City, CA	$3,966,070,638	2,260	13	29
119	Matter	St. Louis	$3,811,053,690	2,360	23	55
120	St. Germain Investment Management	Springfield, MA	$3,791,815,997	6,722	17	42
121	Howland Capital Management	Boston	$3,739,989,265	2,010	7	35
122	The Welch Group	Mountain Brook, AL	$3,682,452,369	4,528	18	28
123	Mozaic	Beverly Hills, CA	$3,644,339,186	93	NA	14
124	CM Wealth Advisors	Beachwood, OH	$3,597,372,487	680	1	24
125	SAX Wealth Advisors	Parsippany, NJ	$3,596,080,962	5,429	33	39

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126	The Burney Company	Reston, VA	$3,588,662,390	4,528	22	46
127	Venturi Wealth Management	Austin, TX	$3,581,250,224	4,555	14	38
128	Abacus Wealth Partners	Santa Monica, CA	$3,579,238,156	6,030	33	65
129	Steele Capital Management	Dubuque, IA	$3,547,339,793	4,418	7	15
130	Visionary Wealth Advisors	St. Louis	$3,536,310,209	11,041	45	74
131	Greenwich Wealth Management	Greenwich, CT	$3,518,612,898	625	9	13
132	Biltmore Family Office	Charlotte, NC	$3,467,117,434	86	10	24
133	Morton Capital Management	Calabasas, CA	$3,465,652,532	3,735	19	58
134	Donaldson Capital Management	Evansville, IN	$3,463,957,899	1,848	29	68
135	Wedmont Private Capital	West Chester, PA	$3,440,714,185	2,437	10	15
136	Leavell Investment Management	Mobile, AL	$3,404,753,027	3,023	16	36
137	Frank, Rimerman Advisors	Palo Alto, CA	$3,399,039,031	438	3	5
138	Colony Family Offices	Charlotte, NC	$3,362,394,020	1,048	7	16
139	North Star Asset Management	Neenah, WI	$3,351,878,334	3,554	8	19
140	Summitry	Foster City, CA	$3,350,458,062	4,031	21	46
141	Certuity	North Palm Beach, FL	$3,301,613,248	1,828	10	35
142	BLB & B Advisors	Montgomeryville, PA	$3,255,397,467	3,957	12	32
143	Monograph Wealth Advisors	Manhattan Beach, CA	$3,247,943,717	1,125	5	20
144	Gryphon Wealth	Jacksonville, FL	$3,244,339,200	3,071	3	22
145	Meyer Handelman Company	Rye Brook, NY	$3,237,166,026	487	NA	18
146	Vista Capital Partners	Portland, OR	$3,220,683,655	3,380	19	35
147	Evensky & Katz	Coral Gables, FL	$3,209,825,405	5,801	19	44
148	Principle Wealth Partners	Madison, CT	$3,204,653,344	4,120	12	28
149	Roffman Milller Associates	Philadelphia	$3,198,701,439	1,599	13	15
150	Bogart Wealth	McLean, VA	$3,190,530,230	6,635	15	50