

RIA LEADERS 2025: TOP 150 FEE-ONLY RIA FIRMS

Data partner COMPLY produced the below rankings of U.S.-based fee-only registered investment advisors that provide financial planning services from SEC Form ADV filings as of May 1 using criteria designed by Financial Planning. (NA = not available)

RANK	FIRM NAME	LOCATION	AUM	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
1	Moneta Group Investment Advisors	St. Louis	\$42,795,577,115	44,504	220	538
2	Chevy Chase Trust Company	Bethesda, MD	\$40,286,791,400	5,016	37	118
3	EP Wealth Advisors	Torrance, CA	\$35,570,000,000	49,167	214	557
4	IEQ Capital	Foster City, CA	\$35,380,260,418	1,963	113	222
5	Savant Wealth Management	Rockford, IL	\$29,647,673,271	57,476	262	565
6	Evoke Advisors	Los Angeles	\$27,695,485,582	12,365	42	99
7	Clearstead; Hartland & Company; Clearstead Advisory Solutions	Cleveland	\$24,294,182,322	12,144	34	223
8	Cap Strat	Oakbrook Terrace, IL	\$21,292,246,925	1,069	6	23
9	HB Wealth	Atlanta	\$18,591,404,091	19,370	89	215
10	Aspiriant	Los Angeles	\$15,532,934,000	11,731	74	212
11	Modera Wealth Management	Westwood, NJ	\$15,510,482,152	20,833	121	219
12	WE Family Offices	Coral Gables, FL	\$15,364,800,717	107	32	63
13	Brighton Jones	Seattle	\$14,987,100,484	3,316	159	279
14	IRA Group	Atlanta	\$13,197,612,044	630	15	17
15	Loring, Wolcott & Coolidge Fiduciary Advisors	Boston	\$12,913,949,641	3,385	10	103
16	CV Advisors	Aventura, FL	\$12,855,520,555	3,869	2	71
17	Circle Wealth Management	Summit, NJ	\$12,479,780,365	1,040	10	19
18	Ballentine Partners	Waltham, MA	\$12,005,636,010	6,877	78	88
19	The Mather Group	Chicago	\$11,710,038,016	16,285	103	186
20	Gresham Partners	Chicago	\$11,650,765,321	239	1	64
21	Milagre Wealth Management	White Plains, NY	\$11,448,363,333	384	NA	4
22	Valeo Financial Advisors	Carmel, IN	\$10,639,940,975	23,718	97	177
23	Bridges Investment Management	Omaha, NE	\$10,380,538,213	2,870	27	79
24	The Caprock Group	Boise, ID	\$10,149,325,042	408	43	64
25	Pinnacle Associates	New York	\$9,866,562,515	6,429	29	70

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26	Heck Capital Advisors	Rhineland, WI	\$9,670,498,771	3,815	20	26
27	Fiduciary Counselling	St. Paul, MN	\$9,504,938,311	1,721	18	91
28	Mill Creek Capital Advisors	Conshohocken, PA	\$9,169,595,643	2,260	27	46
29	Conrad Siegel Investment Advisors	Harrisburg, PA	\$9,036,304,927	1,011	22	23
30	Ferguson Wellman Capital Management	Portland, OR	\$8,992,352,428	4,418	26	63
31	Choate Investment Advisors	Boston	\$8,875,554,325	3,850	10	23
32	Parallel Advisors	San Francisco	\$8,735,387,332	14,928	65	126
33	Altair Advisers	Chicago	\$8,681,860,723	946	NA	75
34	Seven Post Investment Office	San Francisco	\$8,361,452,376	231	14	21
35	Soltis Investment Advisors	St. George, UT	\$8,352,553,865	4,499	51	95
36	H.M. Payson	Portland, ME	\$8,129,599,283	4,190	15	36
37	Prowell Financial Management	Exton, PA	\$8,094,993,369	367	3	4
38	Orgel Wealth Management	Altoona, WI	\$8,060,225,434	10,402	31	79
39	Pure Financial Advisors	San Diego	\$8,023,229,867	22,199	64	171
40	Aureus Asset Management	Boston	\$7,763,450,326	879	3	14
41	FLPutnam Investment Management	Lynnfield, MA	\$7,695,902,054	6,380	55	134
42	Bradley Foster & Sargent	Hartford, CT	\$7,676,519,110	4,546	16	57
43	LNW	San Francisco	\$7,658,280,466	3,797	34	91
44	Guided Choice Asset Management	Reno, NV	\$7,652,433,717	86,775	NA	23
45	Plancorp	St. Louis	\$7,295,029,795	6,712	41	83
46	R.M. Davis	Portland, ME	\$7,267,414,894	5,881	20	61
47	The Bollard Group	Boston	\$6,775,655,510	485	1	33
48	Callan Family Office	Radnor, PA	\$6,669,553,323	1,848	NA	42
49	Zhang Financial	Portage, MI	\$6,547,690,960	6,876	17	48
50	Carnegie Investment Counsel	Pepper Pike, OH	\$6,520,130,588	8,127	42	70

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51	JMG Financial Group	Downers Grove, IL	\$6,366,272,925	5,763	41	96
52	Dakota Wealth	Palm Beach Gardens, FL	\$6,335,261,507	9,786	50	78
53	Capital Advisors	Tulsa, OK	\$6,146,880,645	7,297	36	60
54	Andersen	McLean, VA	\$6,080,097,000	584	24	1,970
55	KCM Investment Advisors	Greenbrae, CA	\$5,851,809,754	3,579	7	20
56	Stonegate Investment Group	Birmingham, AL	\$5,670,936,072	2,768	12	14
57	Greycourt & Company	Pittsburgh	\$5,511,789,755	44	1	39
58	Truepoint	Cincinnati	\$5,391,465,030	9,863	37	95
59	Frontier Asset Management	Sheridan, WY	\$5,345,412,024	33,513	13	47
60	Dynamic Wealth Advisors	Phoenix	\$5,341,333,686	15,497	73	130
61	Index Fund Advisors	Irvine, CA	\$5,329,171,931	7,146	16	50
62	Balentine	Atlanta	\$5,295,516,500	3,796	14	64
63	Evergreen Capital Management	Bellevue, WA	\$5,217,923,207	3,147	25	38
64	Westmount Partners	Los Angeles	\$5,202,679,011	4,595	25	39
65	Buckhead Capital Management	Atlanta	\$5,171,178,018	339	10	13
66	Pine Ridge Advisers	New York	\$5,055,214,345	42	NA	15
67	Becker Capital Management	Portland, OR	\$4,982,543,115	2,019	19	37
68	Permcap Investment Office	Charleston, SC	\$4,932,477,414	46	NA	16
69	SYM Financial Advisors	Winona Lake, IN	\$4,879,622,399	5,993	27	74
70	TFO Wealth Partners	Maumee, OH	\$4,852,786,561	5,141	36	67
71	Alesco Advisors	Pittsford, NY	\$4,810,630,597	1,662	15	27
72	Moss Adams Wealth Advisors	Seattle	\$4,753,819,117	4,627	30	60
73	Moran Wealth Management	Naples, FL	\$4,743,610,462	12,230	34	50
74	Apella Wealth	West Hartford, CT	\$4,714,755,698	10,931	44	94
75	The Clarius Group	Seattle	\$4,680,010,497	1,511	17	35

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76	Clear Investment Research	Alpharetta, GA	\$4,662,741,651	277	3	5
77	Constellation Wealth Advisors	Cincinnati	\$4,661,729,458	2,454	17	31
78	Northeast Financial	Westport, CT	\$4,589,561,519	1,596	2	8
79	Heritage Wealth Advisors	Richmond, VA	\$4,567,546,731	1,623	15	36
80	TCI Wealth Advisors	Tucson, AZ	\$4,527,183,704	11,010	33	60
81	LNW	Seattle	\$4,526,284,775	2,463	38	91
82	Advance Capital Management	Southfield, MI	\$4,504,447,556	14,365	30	55
83	Veratis Advisors	Cary, NC	\$4,478,828,516	431	4	8
84	True North Advisors	Dallas	\$4,478,245,158	4,317	28	65
85	Chicago Capital	Chicago	\$4,477,490,797	2,058	12	18
86	Sepio Capital	Salt Lake City	\$4,464,814,589	345	15	27
87	Hamilton Capital	Columbus, OH	\$4,381,851,944	9,076	50	93
88	G10	Hunt Valley, MD	\$4,344,889,495	158	NA	43
89	Brownson, Rehmus & Foxworth	Chicago	\$4,270,994,216	3,359	15	26
90	Heritage Investors Management	Bethesda, MD	\$4,180,784,341	1,426	8	20
91	TFO Family Office Partners	Phoenix	\$4,167,483,722	1,939	26	80
92	Mainstay Capital Management	Grand Blanc, MI	\$4,167,228,076	3,445	15	32
93	Destination Wealth Management	Walnut Creek, CA	\$4,145,050,618	5,732	34	56
94	Clifford Swan Investment Counselors	Pasadena, CA	\$4,143,559,319	2,522	12	33
95	The Pacific Financial Group	Bellevue, WA	\$4,111,414,788	18,959	16	66
96	Mozaic	Beverly Hills, CA	\$4,068,716,711	76	NA	13
97	Stelac Advisory Services	New York	\$4,060,308,136	369	2	22
98	Twin Focus Capital Partners	Boston	\$4,048,279,609	77	14	37
99	Yale Capital	St. Petersburg, FL	\$4,043,423,072	112	5	7
100	Finaccess Advisors	Miami	\$4,021,350,321	169	6	12

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101	Willis Investment Counsel	Gainesville, GA	\$3,954,398,131	511	7	13
102	Eversource Wealth Advisors	Birmingham, AL	\$3,954,297,526	12,633	40	76
103	Reynders, McVeigh Capital Management	Boston	\$3,916,569,543	749	23	34
104	Verdence Capital Advisors	Hunt Valley, MD	\$3,912,055,977	7,206	28	49
105	IWP Wealth Management	Denver	\$3,907,511,486	71	12	31
106	Bragg Financial Advisors	Charlotte, NC	\$3,904,367,607	1,552	15	33
107	Sand Hill Global Advisors	Palo Alto, CA	\$3,880,425,697	2,055	16	31
108	Facet	Baltimore	\$3,865,037,052	34,597	58	150
109	ZWJ Investment Counsel	Atlanta	\$3,856,084,952	2,293	12	19
110	Goelzer Investment Management	Carmel, IN	\$3,846,550,007	877	14	35
111	Salem Investment Counselors	Winston Salem, NC	\$3,844,773,011	3,064	10	18
112	Three Bell Capital	Dallas	\$3,802,284,800	556	13	21
113	Greenspring Advisors	Towson, MD	\$3,775,318,486	4,764	28	42
114	BakerAvenue	San Francisco	\$3,771,014,366	3,138	29	46
115	Wescott Financial Advisory Group	Philadelphia	\$3,725,004,015	3,329	24	50
116	Southeast Asset Advisors	Thomasville, GA	\$3,717,428,235	1,338	9	15
117	Accredited Investors Wealth Management	Edina, MN	\$3,715,189,973	4,848	4	54
118	Sage Financial Group	West Conshohocken, PA	\$3,624,143,746	4,205	20	25
119	Matter Family Office	Clayton, MO	\$3,545,783,894	2,603	17	51
120	Foster Group	West Des Moines, IA	\$3,542,998,153	5,481	48	85
121	Halbert Hargrove	Long Beach, CA	\$3,516,418,609	4,671	40	52
122	Lindbrook Capital	Calabasas, CA	\$3,501,183,718	2,420	7	10
123	Team Hewins	Redwood City, CA	\$3,433,219,636	2,030	20	26
124	CM Wealth Advisors	Beachwood, OH	\$3,404,516,891	614	4	22
125	Performance Wealth	Hinsdale, IL	\$3,387,124,011	2,296	9	14

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126	BIP Wealth	Atlanta	\$3,364,405,786	8,671	39	63
127	Sage Mountain Advisors	Atlanta	\$3,364,259,268	174	16	25
128	CX Institutional	Auburn, IN	\$3,337,998,958	10,518	59	92
129	Howland Capital Management	Boston	\$3,322,697,821	1,869	11	33
130	Pittenger & Anderson	Lincoln, NE	\$3,311,270,399	2,126	14	14
131	Raub Brock Capital Management	Larkspur, CA	\$3,224,358,789	7,179	6	9
132	The Welch Group	Birmingham, AL	\$3,212,010,865	4,185	24	25
133	Biltmore Family Office	Charlotte, NC	\$3,164,134,924	951	14	21
134	The Burney Company	Reston, VA	\$3,136,984,434	4,389	27	46
135	Evensky & Katz/Foldes Wealth Management	Coral Gables, FL	\$3,134,240,409	5,522	20	38
136	Wealth Management	Norfolk, NE	\$3,100,744,962	3,617	44	60
137	Certuity	North Palm Beach, FL	\$3,100,032,026	1,889	18	30
138	Donaldson Capital Management	Evansville, IN	\$3,096,851,374	1,742	41	65
139	North Star Asset Management	Neenah, WI	\$3,079,601,758	3,290	NA	19
140	Steele Capital Management	Dubuque, IA	\$3,030,626,319	4,184	11	14
141	Frank, Rimerman Advisors	Palo Alto, CA	\$3,018,353,573	430	2	5
142	Venturi Private Wealth	Austin, TX	\$3,013,731,755	4,291	18	34
143	Summitry	Foster City, CA	\$3,008,628,872	3,384	20	43
144	New England Private Wealth Advisors	Wellesley, MA	\$2,999,207,083	2,761	8	17
145	Heritage Financial Services	Westwood, MA	\$2,989,626,797	6,481	24	49
146	Colony Family Offices	Charlotte, NC	\$2,989,459,612	989	6	15
147	Leavell Investment Management	Mobile, AL	\$2,967,145,153	2,847	22	34
148	Morton Wealth	Calabasas, CA	\$2,956,328,474	3,622	29	57
149	Cobblestone Capital Advisors	Rochester, NY	\$2,933,920,535	3,387	23	43
150	Meyer Handelman Company	Rye Brook, NY	\$2,921,100,517	449	NA	13