

RIA

2026 SURVEY & RANKING



FA's 2026 RIA RANKING

2025 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2025 ASSETS (\$MM)	% GROWTH IN ASSETS (2024-2025)	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
312	McIlrath & Eck	Arlington, Wash.	1,364.90	28.79%	1.06	9.49%	17.63%
313	Moisand Fitzgerald Tamayo	Orlando, Fla.	1,350.22	17.35%	1.49	14.12%	2.83%
314	Virtue Capital Management	Brentwood, Tenn.	1,310.52	8.45%	0.17	6.93%	1.42%
315	Biondo Investment Advisors	Milford, Pa.	1,292.59	16.83%	1.13	8.94%	7.24%
316	Stansberry Asset Management	Westlake, Texas	1,291.27	23.09%	1.29	16.45%	5.70%
317	Chemistry Wealth Management	New York, N.Y.	1,264.27	22.33%	2.27	16.19%	5.28%
318	Ullmann Wealth Partners	Jacksonville Beach, Fla.	1,254.15	16.73%	2.34	0.58%	16.05%
319	Absher Wealth Management	Chapel Hill, N.C.	1,253.50	15.15%	3.13	15.15%	0.00%
320	Opal Wealth Advisors	Jericho, N.Y.	1,238.19	20.31%	1.70	8.61%	10.77%
321	Keen Wealth Advisors	Overland Park, Kan.	1,233.41	18.48%	1.19	7.64%	10.07%
322	HCM Wealth Advisors	Cincinnati, Ohio	1,230.58	13.52%	1.45	2.16%	11.11%
323	Arista Wealth Management	Las Vegas, Nev.	1,201.81	16.85%	2.33	-7.16%	25.85%
324	Frazier Financial Advisors	Columbus, Ohio	1,200.00	34.08%	2.00	22.91%	9.09%
325	Richard Young Advisors	Augusta, Ga.	1,195.34	22.93%	0.62	16.97%	5.09%
326	Tobias Financial Advisors	Plantation, Fla.	1,191.00	33.52%	3.10	21.70%	9.71%
327	DiNuzzo Private Wealth	Beaver, Pa.	1,177.33	16.23%	1.46	16.52%	-0.25%
328	Deerfield Financial Advisors	Indianapolis, Ind.	1,176.25	22.69%	3.55	-24.76%	63.05%
329	Brand Asset Management Group	Chesterfield, Mo.	1,174.40	26.23%	3.36	9.64%	15.13%
330	StraightLine Group	Troy, Mich.	1,170.38	5.76%	0.49	27.81%	-17.25%
331	Woodard & Company Asset Mgmt. Group	Bermuda Run, N.C.	1,167.00	12.32%	0.64	13.56%	-1.09%
332	Great Lakes Retirement	Sheffield Village, Ohio	1,163.78	20.89%	0.70	27.99%	-5.55%
333	Lake Street Private Wealth	Chicago, Ill.	1,158.68	20.47%	1.88	0.72%	19.61%
334	Alaska Wealth Advisors	Anchorage, Alaska	1,156.21	26.50%	1.72	18.22%	7.01%
335	Lucid Advisors	Seattle, Wash.	1,147.36	19.75%	34.77	12.49%	6.45%
336	Elser Financial Planning	Indianapolis, Ind.	1,134.11	16.71%	2.71	9.19%	6.89%
337	Aviance Capital Partners	Naples, Fla.	1,125.64	15.92%	3.03	13.43%	2.20%
338	Insight Wealth Partners	Plano, Texas	1,124.22	15.86%	1.13	9.11%	6.19%
339	Lynx Investment Advisory	Washington, D.C.	1,114.50	-14.53%	4.72	-11.63%	-3.28%
340	Arthur M. Cohen & Associates	Northbrook, Ill.	1,111.51	8.86%	5.88	-3.23%	12.50%
341	Stage Harbor Financial	Westwood, Mass.	1,097.17	12.77%	3.15	7.27%	5.14%
342	Sovereign Financial Group	Stamford, Conn.	1,082.55	22.64%	0.76	3.58%	18.40%
343	YeskeBuie	Vienna, Va.	1,069.35	15.49%	4.04	13.75%	1.53%
344	Fiduciary Benefits Group	San Diego, Calif.	1,065.82	26.37%	3.45	6.74%	18.39%
345	Insight Wealth Strategies	San Ramon, Calif.	1,063.98	14.17%	1.88	13.97%	0.18%
346	Schnieders Capital Mangement	Pasadena, Calif.	1,061.07	22.76%	3.87	34.41%	-8.67%
347	FORM Wealth Advisors	Lake Geneva, Wis.	1,055.57	13.22%	1.33	13.08%	0.13%
348	Armbruster Capital Management	Pittsford, N.Y.	1,055.07	17.13%	2.01	8.41%	8.04%
349	Southern Financial Group	Birmingham, Ala.	1,050.14	12.18%	0.92	10.12%	1.87%
350	MATAURO	New York, N.Y.	1,047.28	48.95%	1.19	36.73%	8.94%
351	Baker Ellis Asset Management	Vancouver, Wash.	1,047.12	19.78%	3.05	21.88%	-1.72%
352	Morling Financial Advisors	Fremont, Calif.	1,047.06	38.55%	2.88	37.41%	0.83%
353	Paragon Financial Advisors	College Station, Texas	1,045.00	15.93%	2.34	5.29%	10.10%
354	William Mack and Associates	Troy, Mich.	1,034.61	26.11%	1.09	29.82%	-2.86%
355	Walkner Condon Financial Advisors	Madison, Wis.	1,031.18	40.71%	1.29	14.33%	23.08%
356	Breakwater Capital Group	Paramus, N.J.	1,019.16	20.84%	2.75	-2.02%	23.33%
357	Verum Partners	Charlotte, N.C.	1,014.13	22.54%	2.50	11.04%	10.35%
358	Fermata Advisors	Sonoma, Calif.	1,009.55	-11.85%	0.48	-58.09%	110.31%
359	BlueSky Wealth Advisors §	New Bern, N.C.	1,004.50	18.20%	2.89	18.88%	-0.57%
360	CapSouth Wealth Management	Dothan, Ala.	1,001.27	13.22%	2.57	18.73%	-4.65%

* Average assets per client relationship. ** Cary Street Partners Investment Advisory is the parent company to Cary Street Partners Investment Advisory. † 2025 AUM is for MAI Capital Management and Evoke Advisors, a wholly owned, affiliated RIA. †† AUM is for FMB Wealth Management and FMB Retirement Services. ‡ Firm started in 2025. ‡‡ 2025 AUM is as of 1/2026. § 2025 AUM is as of 2/2026. §§ 2025 AUM is as of 3/2026. ¶ 2025 AUM is as of 4/2026. ¶¶ AUM is for Laird Norton Wetherby Wealth Management and LNW Wealth Management (merged December 2025).

Opinions and estimates contained in this article are subject to change without notice, as are statements of financial market trends, which are based on current market conditions. This article originally appeared on *Financial Advisor* magazine's website on July/August 2026.

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