

2021 Washington State Money Managers Ranking List (by AUM)

Total AUM: \$1,212,280,000,000 (updated 1/15/22)

Firms With Year-Over-Year Increase in AUM = \$ green

Financial Services Executive Recruiting Roger A. Hendrix, Sr.

President

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	Assets are in millions and are as of January 15, 2022					
Rank	Manager	Manager Type	City	Assets		
271	Abraham & Co., Inc.	Wealth Mgm't	Gig Harbor	\$44		
52	Acuitas Investments, LLC	Money Management/Mutual Funds	Seattle	\$1,004		
298	Adair Wealth Management	Wealth Mgm't	Bellevue	\$30		
205	Adams Financial Concepts, LLC	Wealth Mgm't	Seattle	\$105		
160	Agate Pass Investment, LLC	Wealth Mgm't	Bainbridge Island	\$180		
212	Aletheian Wealth Advisors, LLC	Wealth Mgm't	Bellevue	\$100		
200	Alliant Securities, Inc.	Wealth Mgm't	Liberty Lake/Spokane	\$109		
225	Allison Spielman Advisors	Wealth Mgm't	Bellevue	\$80		
334	American Northwest Advisory Svcs, LLC	Wealth Mgm't/Pension & Profit Sh.	Federal Way	\$13		
75	Archon Capital Mgm't, LLC	Hedge Fund Mgm't	Seattle	\$536		
327	Ariston Capital Mgm't Corp.	Money Mgm't/Mutual Fund Spec.	Bellevue	\$18		
118	ASI Wealth Management	Wealth Mgm't	Seattle & 3 Oregon Offices	\$278		
165	Aspire Capital Advisors, LLC	Wealth Mgm't	Seattle	\$165		
283	Asymmetric Advantage Capital Mgm't, LLC	Wealth Mgm't	Bellevue	\$38		
56	Auxano Advisors, LLC	Wealth Mgm't	Kirkland	\$908		
67	Avier Wealth Advisors	Wealth Mgm't	Bellevue/Lake Oswego,OR	\$650		
162	Aviso Wealth Management	Wealth Mgm't	Seattle/PA/ME/MD	\$170		
104	B3 Wealth Strategies	Wealth Mgm't	Bellevue	\$349		
127	BAC Capital Advisors, LLC	Wealth Mgm't/Pension & Profit Sh.	Seattle	\$255		
17	Badgley Phelps Wealth Managers	Wealth Mgm't	Seattle	\$4,600		
24	Baird Investment Group/Robert W. Baird & Co.	Broker Dealer, Investm't Advisor	Seattle/Yakima/Mt. Vernon	\$3,553		
369	Banner Investment Consultants	Wealth Mgm't	Anacortes	\$2		
35	Barwick & Partners, Inc.	Wealth Mgm't	Seattle	\$2,076		

157	BBJS Financial Advisors, LLC	Wealth Mgm't	Seattle	\$193
269	BBM Financial Services, Inc.	Wealth Mgm't/Pension & Profit Sh.	Yakima	\$47
119	Bear Mountain Capital	Wealth Mgm't	Seattle	\$277
115	Bellevue Asset Mgm't, LLC	Wealth Mgm't	Bellevue	\$297
216	Bellingham Capital	Wealth Mgm't	Bellingham/Anacortes	\$88
50	Benchmark Plus Management, LLC	Wealth/Hedge Fund Mgm't	Tacoma/New Jersey	\$1,007
163	BHJ Wealth Advisors	Wealth Mgm't	Gig Harbor	\$170
79	Blackcrane Capital	Wealth/Hedge Fund Mgm't	Bellevue	\$489
140	Bogdanovich Wealth Management, PLLC	Wealth Mgm't	Edmonds	\$225
138	Boone Wealth Advisors, LLC	Wealth Mgm't	Bellevue	\$227
44	Bordeaux Wealth Advisors	Wealth Mgm't	Bellevue	\$1,320
336	BR Capital, Inc.	Wealth Mgm't	Camas	\$13
239	Brackenwood Capital Management	Wealth Mgm't	Bainbridge Island	\$67
137	Breakwater Investment Management	Wealth Mgm't	Seattle	\$230
8	Brighton Jones, LLC	Wealth Mgm't	Seattle/SF/AZ/DC/OR	\$9,800
36	Bristlecone Advisors, LLC	Wealth Mgm't	Bellevue	\$1,829
197	Buckley Investment Group, LLC	Wealth Mgm't	Walla Walla	\$114
215	Byrne & Company Wealth Management	Wealth Mgm't	Olympia	\$97
210	Cadence Wealth Management	Wealth Mgm't	Seattle	\$101
112	Canterbury Consulting, Inc.	Wealth Mgm't	Seattle/CA	\$300
254	Capital Investment Services, LLC	Wealth Mgm't/Tax Services	Lynnwood	\$59
370	Capital Management Resources, LLC	Wealth Mgm't	Port Orchard	\$2
78	Capital Planning, LLC	Wealth Mgm't	Bellevue	\$495
302	Catton Financial Services	Wealth Mgm't	Spokane	\$26
281	Cedar River Capital, LLC	Wealth Mgm't	Seattle	\$41
344	Cetera Advisors, LLC	Broker Dealer, Investm't Advisor	Multiple Offices	\$10
107	Chaney Capital Mgm't	Wealth Mgm't	Lynnwood	\$338
359	Chernofsky Financial, LLC	Wealth Mgm't	Vancouver	\$4
156	Christensen, King & Assoc. Investment Svcs.	Wealth Mgm't	Richland	\$194
337	CIM Financial Group, Inc.	Wealth Mgm't	Lynnwood	\$12
242	Clear Wealth Management	Wealth Mgm't	Lynnwood/NY	\$64
333	Clearbrook Investment Management	Wealth Mgm't	Bellingham	\$14
342	Coast Capital Management, LLC	Wealth Mgm't/Pension & Profit Sh.	Bainbridge Island	\$11
12	Coldstream Wealth Management	Wealth Mgm't	Bellevue/Seattle	\$7,032
142	Columbia Advisory Partners, LLC	Wealth Mgm't	Spokane	\$225
13	Columbia Pacific Advisors, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$6,600
89	Columbia River Advisors, LLC	Wealth Mgm't	Tacoma	\$442
353	Columbia Strategic Wealth Advisors, LLC	Wealth Mgm't	Seattle	\$8
258	Commencement Financial Planning, LLC	Wealth Mgm't	Tacoma	\$56
305	Commodore Asset Management, LLC	Wealth Mgm't	Tacoma	\$25
295	Companion Portfolio Management	Wealth Mgm't	Sequim	\$30
111	Comprehensive Wealth Mgm't	Wealth Mgm't	Lynnwood	\$306
376	Comus Investment, LLC	Wealth Mgm't	Olympia	\$1
129	Conover Capital Management, LLC	Wealth Mgm't	Bellevue	\$242
91	Conway Jarvis & Associates, LLC	Wealth Mgm't	Seattle	\$438
365	Core Capital Advisors, LLC	Wealth Mgm't	Olympia	\$3
304	Crafted Finance, LLC	Wealth Mgm't	Seattle	\$26

45 Cutler Investment Counsel, LLC Wealth Mgm1/Mutual Funds Seattle/AK/CA/OR \$1,100 18 D.A. Davidson & Co. Broker Dir/Wealth Mgm1/Tust W/AMT/NE/CA \$4,40 38 D'Amuraiz Consulting Group, LLC Wealth Mgm1 Tacona \$1,681 345 Decker Reitinement Planning, Inc. Wealth Mgm1 Kirkland/Realtafu/T \$10 345 Demars Financial Group Wealth Mgm1 Spokane,/Kenai, AK \$227 175 Dental Wealth Advisors, LLC Wealth Mgm1 Spokane,/Kenai, AK \$227 248 Dightman Capital Group, Inc. Wealth Mgm1 Seattle \$144 248 Dightman Capital Group, Inc. Wealth Mgm1 Seattle \$3 348 Drectional Fladey, LTD Wealth Mgm1 Seattle \$312 348 Drectional Fladey, LTD Wealth Mgm1 Seattle \$15 349 Elide Wealth Management, Inc./Finc. Globe Investors Morey Mymbrus Flades Seattle \$15,000 419 Elide Wealth Management Wealth Mgm1 Seattle Mgm1 Kirkland \$25<	200	Creative Detinance of Disputer	Manalth Manarit	Codes (Charall (Comes 11/C)	C O
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Empirical Wealth Management Wealth Mgm¹ SeatBlvusSpokniAKCA/OR \$3,046 BP Wealth Advisors, LLC Wealth Mgm¹ SeatBlvusSpokniAKCA/OR \$3,046 BE Wealth Management Wealth Mgm¹ SeatBle/Multi-state \$1,350 BE Q Wealth Management Wealth Mgm¹ Mercer Island \$369 BE Q Wealth Management Wealth Mgm¹ Mercer Island \$369 BE Q Wealth Advisors, Inc. Wealth Mgm¹ Spokane/Portland \$214 Lesian Wealth Advisors, Inc. Wealth Mgm¹ Spokane/Portland \$214 121 Evans Capital Mgm¹ Associates Wealth Mgm¹ Bellevue \$269 23 Evergreen Capital Management, LLC Wealth Mgm¹ Bellevue \$3,700 Evergreen Wealth Management Services, Inc. Wealth Mgm¹ Port Ludlow \$58 255 Evergreen Wealth Management Services, Inc. Wealth Mgm¹ Port Ludlow \$58 176 Fairview Partners Investment Mgm¹, LLC Hedge Fund Mgm¹ Seattle \$115 177 Fiduciary Counselling, Inc. Wealth Mgm¹ Tacoma \$300 178 Fiduciary Counselling, Inc. Wealth Mgm¹ Tacoma \$300 179 Financial Advocates Investment Mgm¹ Wealth Mgm¹ Broker-Dealer/RIA Olympia, Portland \$23,796 179 Financial Freedom for Dentists, LLC Wealth Mgm¹ Snoqualmie \$113 170 Financial Insights, Inc. Wealth Mgm¹ Tacoma \$330 170 Financial Plan, Inc. Wealth Mgm¹ Bellingham \$330 170 Financial Research, Inc. Wealth Mgm¹ Issaquah \$70 170 Financial Research, Inc. Wealth Mgm¹ Issaquah \$70 170 Financial Research Inc. Wealth Mgm¹ Seattle \$43 170 Firebrand Wealth Management, LLC Wealth Mgm¹ Seattle \$43 170 Firebrand Wealth Management Wealth Mgm¹ Seattle \$43 170 Firebrand Wealth Management Wealth Mgm¹ Seattle \$43 170 Firebrand Pan, Inc. Wealth Mgm¹ Seattle \$43 171 Firebrand Pan, Inc. Wealth Mgm¹ Seattle \$47 172 Firebrand Wealth Management Wealth Mgm¹ Seattle \$47 173 Firebrand Wealth Management Wealth Mgm¹ Seattle \$45 174 Financial Planning, LLC Wealth Mgm¹ Seattle \$55 175 Fiort Asset Management, LLC Wealth Mgm¹ Seattle \$55 176 Fiort Seatel Planning, LLC Wealth Mgm¹ Seattle \$55 176 Fiort Management LLC Wealth Mgm¹ Seattle \$55 177 Fortic Capital Management Uncle Wealth Mgm¹ Seattle \$7,223 176 Fiort Scapital Management Uncle Wealth M	149	Elliott Cove Cap. Mgm't	Wealth Mgm't	Seattle	\$208
### EP Wealth Advisors, LLC Wealth Mgm*t Seattle/Multi-state \$1,350 ### EQ Wealth Management Wealth Mgm*t Mercer Island \$369 ### Etesian Wealth Advisors, Inc. Wealth Mgm*t Spokane/Portland \$214 ### Etesian Wealth Advisors, Inc. Wealth Mgm*t Spokane/Portland \$214 ### Etesian Wealth Mgm*t Associates Wealth Mgm*t/Insurance Seattle/Bellevue \$269 ### Seattle Wealth Mgm*t Bellevue \$3,700 ### Evergreen Capital Management, LLC Wealth Mgm*t Bellevue \$3,700 ### Evergreen Wealth Management Services, Inc. Wealth Mgm*t Port Ludiow \$58 ### Evolytical Investments, LLC Wealth Mgm*t Tacoma \$1 ### Evolytical Investments, LLC Wealth Mgm*t Tacoma \$1 ### Seattle \$115 ### Tacoma \$300 ### Financial Parients Investment Mgm*t, LLC Hedge Fund Mgm*t Tacoma \$300 ### Tacoma \$300 ### Financial Advocates Investment Mgm*t Wealth Mgm*t Tacoma \$300 ### Financial Freedom for Dentists, LLC Wealth Mgm*t Snoqualmie \$113 ### Financial Freedom for Dentists, LLC Wealth Mgm*t Tacoma \$532 ### Financial Plan, Inc. Wealth Mgm*t Tacoma \$532 ### Financial Plan, Inc. Wealth Mgm*t Bellingham \$930 ### Einancial Plan, Inc. Wealth Mgm*t Bellingham \$930 ### Financial Research, Inc. Wealth Mgm*t Bellingham \$930 ### Financial Plan, Inc. Wealth Mgm*t Seattle \$43 ### Firebrand Wealth Management, LLC Wealth Mgm*t Seattle \$43 ### Firebrand Wealth Management Wealth Mgm*t Seattle \$17 ### Firebrand Wealth Management Wealth Mgm*t Seattle \$17 ### Firebrand Wealth Management Wealth Mgm*t Seattle \$17 ### Firebrand Wealth Mgm*t Camas \$155,612 ### Firebrand Wealth Mgm*t Seattle \$55 ### Firebrand Planning, LLC Wealth Mgm*t Seattle \$55 ### Fort Vancouver Investment Management, LLC Wealth Mgm*t Vancouver/Portland \$140 ### Fort Sacotial Planning, LLC Wealth Mgm*t Seattle \$156 ### Fort Vancouver Investment Management, LLC Wealth Mgm*t Seattle \$156 ### F	74	Emerald Advisors, LLC	Wealth Mgm't	Bellevue	\$540
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Fortitude Adv. Group, LLC(Sound With Prtners) Wealth Mgm't Gig Harbor \$191 Freestone Capital Mgm't, LLC Wealth/Hedge Fund Mgm't Seattle \$7,223 FRG Family Wealth Advisors Wealth Mgm't Bellevue/AZ/CA/TX \$609 FSR Wealth Management, LLC Wealth Mgm't Bellingham \$30 Fulcrum Capital, LLC Wealth Mgm't Seattle \$931 Wealth Mgm't Bellevue \$47	178		Wealth Mgm't	Vancouver/Portland	\$140
11 Freestone Capital Mgm't, LLC Wealth/Hedge Fund Mgm't Seattle \$7,223 71 FRG Family Wealth Advisors Wealth Mgm't Bellevue/AZ/CA/TX \$609 296 FSR Wealth Management, LLC Wealth Mgm't Bellingham \$30 54 Fulcrum Capital, LLC Wealth Mgm't Seattle \$931 268 Fulcrum Wealth Advisors, LLC Wealth Mgm't Bellevue \$47	167	Fortis Capital Management LLC	Wealth Mgm't	Seattle	\$156
FRG Family Wealth Advisors Wealth Mgm't Bellevue/AZ/CA/TX \$609 296 FSR Wealth Management, LLC Wealth Mgm't Bellingham \$30 54 Fulcrum Capital, LLC Wealth Mgm't Seattle \$931 268 Fulcrum Wealth Advisors, LLC Wealth Mgm't Bellevue \$47	159	Fortitude Adv. Group, LLC(Sound With Prtners)	Wealth Mgm't	Gig Harbor	\$191
FSR Wealth Management, LLC Wealth Mgm't Bellingham \$30 Fulcrum Capital, LLC Wealth Mgm't Seattle \$931 Fulcrum Wealth Advisors, LLC Wealth Mgm't Bellevue \$47	11	Freestone Capital Mgm't, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$7,223
54 Fulcrum Capital, LLC Wealth Mgm't Seattle \$931 268 Fulcrum Wealth Advisors, LLC Wealth Mgm't Bellevue \$47	71	FRG Family Wealth Advisors	Wealth Mgm't	Bellevue/AZ/CA/TX	\$609
268 Fulcrum Wealth Advisors, LLC Wealth Mgm't Bellevue \$47	296	FSR Wealth Management, LLC	Wealth Mgm't	Bellingham	\$30
	54	Fulcrum Capital, LLC	Wealth Mgm't	Seattle	\$931
	268	Fulcrum Wealth Advisors, LLC	Wealth Mgm't	Bellevue	\$47
	273	Gallagher Capital Corp.	Wealth Mgm't	Bainbridge Island	\$43

Garland Capital Mgm't, Inc. Wealth Mgm't Bellevue GK Capital Partners Wealth/Hedge Fund Mgm't Olympia Goldbloom Wealth Management, LLC Wealth Mgm't Bellevue Gould Capital, LLC Wealth Mgm't Tacoma	\$1,511 \$257
GK Capital Partners Wealth/Hedge Fund Mgm't Olympia S Goldbloom Wealth Management, LLC Wealth Mgm't Bellevue S Gould Capital, LLC Wealth Mgm't Tacoma	
Goldbloom Wealth Management, LLC Wealth Mgm't Bellevue Solution Gould Capital, LLC Wealth Mgm't Tacoma Solution Gould Capital, LLC Wealth Mgm't Tacoma Solution Gould Capital, LLC Solution Gould Capi	100
73 Gould Capital, LLC Wealth Mgm't Tacoma	\$36
	\$87
	\$147
Great Northern Asset Management, LLC Wealth Mgm't Vancouver	\$265
Greene Wealth Management, LLC Wealth Mgm't Seattle	\$1,042
Gregory Lyle & Company Wealth Mgm't Clinton	\$119
Griffiths, Dreher & Evans, PS, CPAs Wealth Mgm't/Tax Services Spokane	\$115
Gunn Capital Management, LLC Wealth Mgm't Pateros	\$20
Halbert Hargrove Wealth Mgm't Bellevue/Multi-state	\$125
20 Hamrick Investment Counsel, LLC Wealth Mgm't Seattle	\$276
58 Hana Road Capital, LLC Wealth Mgm't/Hedge Fund Seattle S	\$4
	\$47
	\$365
	\$300
<u> </u>	\$80
	\$398
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	\$143
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	\$361 \$405
	\$105 \$20
	\$20
	\$174
	\$62
	\$138
	\$29
,	\$429
	\$2
	\$18
	\$196
John T. McCarthy, LLC Wealth Mgm't Spokane	\$133
Johnson & Shute Investment Advisors, Inc. Wealth Mgm't/Tax Services Bellevue	\$97
Julie A. Wurst, CFP, LLC Wealth Mgm't Tacoma	\$31
38 K.L. Baird Asset Mgm't Wealth Mgm't Bothell	\$12
•	\$79
Kairos Capital Management, LLC Wealth Mgm't Bellevue	\$202

220	Kamada Investment Management	Woolth Mamit	Pollovuo	¢16
330	Kamada Investment Management	Wealth Mgm't	Bellevue	\$16 \$72
231 168	Karel Capital, Inc. Kaufman Kampe Advisors	Wealth Mgm't	Spokane Mercer Island	\$72 \$155
	'	Wealth Mgm't		•
290	Kelp Capital, LLC	Wealth Mgm't	Seattle	\$33
47	Kiley Juergens Wealth Management, LLC	Wealth Mgm't	Olympia	\$1,025
51	Kosmos Management, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$1,005
31	Kunath Karren Rinne & Atkin, LLC	Wealth Mgm't	Seattle	\$2,980
88	Kutscher Benner Barsness & Stevens, Inc.	Wealth Mgm't	Seattle	\$443
19	Laird Norton W'lth Mgm't(Strat./Trust Co, LLC)	Wealth Mgm't/Trust Mgm't	Seattle	\$4,171
101	Lakeside Advisors, Inc.	Wealth Mgm't	Seattle	\$365
288	Latticework Capital	Wealth Mgm't/Hedge Fund	Sammamish	\$36
177	Leeward Financial Partners, LLC	Wealth Mgm't	Seattle	\$142
72	Leonard Rickey Investment Advisors, PLLC	Wealth Mgm't	Richland/Seattle/Yakima	\$580
170	Lesa Sroufe & Company, Inc.	Wealth Mgm't	Seattle	\$152
355	Leverage Planners Wealth Management, LLC	Wealth Mgm't	Bellevue	\$7
264	Lifefocus Financial Advisors, LLC	Wealth Mgm't/Tax Services	Walla Walla	\$53
341	Lin Capital Management, LLC	Wealth/Hedge Fund Mgm't	Bellevue	\$12
145	Lincoln Invstment Plng (IA'sTremper & Roper)	Wealth Mgm't	Renton	\$212
146	Lodestone Wealth Management, LLC	Wealth Mgm't	Spokane	\$210
291	Long Term Investors, LLC	Wealth Mgm't	Wenatchee	\$32
64	Lucid Advisors, Inc.	Wealth Mgm't	Seattle	\$694
324	Ludeman Capital Management, Inc.	Wealth Mgm't	Ferndale	\$19
130	Madison Park Capital Advisors, LLC	Wealth Mgm't	Seattle	\$242
128	Madrona Financial Services, LLC	Wealth Mgm't	Everett/Blvue/Seattle	\$254
211	Mangan Wealth Management	Wealth Mgm't	Seattle	\$100
97	Marshall & Sullivan, Inc.	Wealth Mgm't	Seattle	\$397
77	MarsJewett Financial Group	Wealth Mgm't	Bellevue	\$498
229	Martin Nelson & Co., Inc.	Wealth Mgm't	Seattle	\$80
317	McBee Advisors, Inc.	Wealth Mgm't	Bellevue, Glendale AZ	\$20
188	McBride Financial Advisors, LLC	Wealth Mgm't	Seattle	\$130
21	McCutchen Group, LLC	Wealth Mgm't	Seattle	\$3,700
69	McIlrath and Eck, LLC	Wealth Mgm't	Arlington	\$645
233	MCM Advisory, LLC	Wealth Mgm't	Richland	\$72
318	Mellor & Associates, LLC	Wealth Mgm't	Bellevue	\$20
238	Mercer Asset Mgm't, Inc.	Wealth Mgm't	Bainbridge Island	\$68
319	Meridan Capital, LLC	Wealth/Hedge Fund Mgm't	Bellevue	\$20
263	Meridian Wealth Management, LLC	Wealth Mgm't	Bellevue	\$55
22	Merriman	Wealth Mgm't	Blvue/S'ttle/Spok./Eugene	\$3,700
221	Middleton & Company	Wealth Mgm't	Vancouver	\$84
4	Milliman Advisors, LLC	Wealth Mgm't/Pension Consultants	Seattle/Muiltiple Offices	\$50,328
372			·	\$2
	Moe Investment Management, LLC	Wealth Mgm't	Spokane	
206	Monson Wealth Management, Inc.	Wealth Mgm't	Kennewick	\$104
241	Moore Wealth Management, LLC	Wealth Mgm't	Renton	\$65
147	Moser Wealth Advisors, LLC	Wealth Mgm't/Tax Services	Bellevue	\$210
33	Moss Adams Wealth Advisors	Wealth Mgm't	Seattle/Everett/Tac/Yakima	\$2,781
92	Mountain Pacific Advisors, LLC	Hedge Fund/Pens./Profit-Sharing	Bellevue	\$431
151	My Personal CFO	Wealth Mgm't	Vancouver	\$202

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315	Nelson Financial Management, LLC	Wealth Mgm't	Kirkland	\$21
203	Newground Social Investment	Wealth Mgm't	Seattle	\$107
189	Nierenberg Investment Mgm't Company, Inc.	Wealth/Hedge Fund Mgm't	Camas	\$127
106	Northern Capital Management, Inc.	Wealth Mgm't	Spokane	\$342
279	Northern Lights Advisors, Inc.	Wealth Mgm't	Seattle	\$42
86	Northwest Administrators, Inc.	Pension/Trust Administration	Seattle	\$460
29	Northwest Asset Management	Wealth Mgm't	Mercer Island	\$3,100
152	Northwest Capital Management, Inc.	Wealth Mgm't	Portland/Bellevue	\$200
265	Northwest Financial Choices	Wealth Mgm't/Tax Planning	Renton	\$50
335	Northwest Investment Advisors, Inc.	Broker Dealer, Investm't Advisor	Spokane	\$13
224	NR Smith & Associates, P.S.	Wealth Mgm't/Tax Services	Olympia	\$82
360	NUKU Asset, Inc.	Wealth Mgm't	Bainbridge Island	\$4
321	NWT Advisors, LLC	Wealth Mgm't/Tax Services	Duvall	\$20
73	Oak Harbor Capital, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$567
109	Oliver Capital Mgm't, Inc.	Wealth Mgm't	Seattle	\$327
182	Olson Investment Advisors, LLC	Wealth Mgm't	Seattle	\$136
172	Olympic Wealth Management, LLC	Wealth Mgm't	Bothell	\$150
250	Omega Financial Investment & Insurance	Financial Planning/Insurance	Kirkland	\$61
270	Opal Advisors	Wealth Mgm't/Hedge Fund Mgm't	Bellevue	\$46
27	Oppenheimer & Co., Inc.	Wealth Mgm't	Seattle/Multi-Office	\$3,235
185	Optimist Retirement, LLC	Wealth Mgm't	Bellevue/Scottsdale AZ	\$134
131	Pacific Asset Mgm't, LLC	Wealth Mgm't	Gig Harbor/Shelton	\$240
244	Pacific Crest Financial Advisors, LLC	Wealth Mgm't/Inv. Advisors	Everett/Seattle	\$62
105	Pacific Current Group	Hedge Fund Mgm't	Seattle/Tacoma	\$347
252	Pacific Financial Advisors, Inc.	Wealth Mgm't	Bellevue	\$61
286	Pacific Horizon Investment Management, LLC	Wealth Mgm't	Seattle	\$36
20	Pacific Portfolio Consulting, LLC	Wealth Mgm't	Seattle	\$4,052
133	Palouse Capital Mgm't, Inc. (prev.Ken Roberts)	Wealth Mgm't	Spokane	\$234
1	Parametric Portfolio Associates	Money Mgm't/Mutual Fund Spec.	Seattle	\$413,000
40	Parcion Private Wealth, LLC	Wealth Mgm't	Bellevue	\$1,521
202	Parker Financial, LLC	Wealth Mgm't	Silverdale	\$108
16	Pathstone (Pacific Northwest Region-Only)	Multi-Family Office	Blvue/Seattle/Anchorage	\$4,850
61	Paul R. Ried Financial Group, LLC	Wealth Mgm't	Bellevue	\$831
259	Paysse Jennison, Inc.	Wealth Mgm't	Mercer Island	\$55
351	Pegasus Investment Mgm't, LLC	Wealth/Hedge Fund Mgm't	Bainbridge Island	\$8
243	Pengra Capital Mgm't, Inc.	Wealth Mgm't/Hedge Fund	Seattle	\$63
323	Percension Wealth Advisors, LLC	Wealth Mgm't	Seattle	\$20
80	Personal Investment Mgm't, Inc.	Wealth Mgm't	Redmond	\$488
53	Petersen Hastings Investment Mgm't, Inc.	Wealth Mgm't	Kennewick	\$1,000
228	Peterson Investment Mgm't, Inc.	Wealth Mgm't	Spokane	\$80
332	PG Global Wealth Management, Inc.	Wealth Mgm't	Bellevue	\$16
367	Pi Square Capital, LLC	Wealth Mgm't	Bellevue	\$3
272	PLM Investment Advisers, Inc.	Wealth Mgm't	Spokane	\$43
262	PNW Asset Management	Wealth Mgm't	Seattle	\$55
300	Polaris Asset Mgm't, LLC	Wealth Mgm't	Seattle	\$27
193	Portfolio Strategies, Inc.	Wealth Mgm't	Tacoma	\$123
249	Prentice Financial Planning, LLC	Wealth Mgm't	Olympia	\$61
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368	Presidio Financial Group, Inc.	Wealth Mgm't	Sammamish	\$3
201	Prevail Wealth Management	Wealth Mgm't	Kirkland	\$109
316	Prism Capital Management	Wealth Mgm't	Seattle	\$20
83	Private Advisory Group	Wealth Mgm't	Redmond	\$477
171	Private Asset Mgm't, Inc.	Wealth Mgm't	Kirkland	\$151
81	Private Income Capital Management	Wealth Mgm't	Seattle	\$486
95	Private Ocean Wealth Management	Wealth Mgm't	Seattle/CA	\$400
297	Private Wealth Management Solutions, LLC	Wealth Mgm't	Bellevue	\$30
234	Professional Investment Management Services,	PI Wealth Mgm't	Kennewick	\$71
352	Prospero Wealth, LLC	Wealth Mgm't	Seattle	\$8
7	Pugh Capital Mgm't, Inc.	Institutional Fixed Inc. Money Mgr	Seattle	\$11,600
87	Quantum Financial Planning Services, Inc.	Wealth Mgm't	Spokane	\$457
311	R&R Retirement Services, Inc.	Wealth Mgm't	Seattle	\$23
232	R. Brian Howell & Associates, Inc.	Wealth Mgm't	Tacoma	\$72
247	Ragnar Wealth Management, LLC	Wealth Mgm't	Tumwater/Bellingham	\$62
274	Rainier Wealth Management, LLC	Wealth Mgm't	Mukilteo	\$43
132	Ramsey & Associates, Inc.	Wealth Mgm't	Seattle	\$239
261	Renaissance Wealth Counsel, LLC	Wealth Mgm't/Tax Services	Bellevue	\$55
135	Richards, Merrill & Peterson, Inc.	Wealth Mgm't	Spokane	\$230
94	Robinswood Financial, LLC	Wealth Mgm't	Kirkland	\$413
158	Runde & Co., LLC	Wealth Mgm't	Seattle	\$193
2	Russell Investment Group	Money Management	Seattle	\$330,100
122	S.R. Schill & Assoc., Inc.	Wealth Mgm't	Mercer Island	\$267
245	Sabin Investment Management, Inc.	Wealth Mgm't	Gig Harbor	\$62
374	Salmon Bay Wealth Management, LLC	Wealth Mgm't	Seattle	\$2
148	Sander Capital Advisors	Wealth Mgm't	Seattle	\$209
277	Sapling Wealth Management	Wealth Mgm't	Seattle	\$43
180	Sapphire Star Capital, LLC	Wealth/Hedge Fund Mgm't	Kirkland	\$138
306	Satori Financial, LLC	Wealth Mgm't	Seattle	\$25
14	Saturna Capital Corporation	Money Mgm't/Mut'l Fnd Spec/B-Dlr	Bellingham	\$6,500
84	Schmidt Financial Group, Inc.	Wealth Mgm't	Kirkland/Mtn View, CA	\$475
294	SCS Systems, Inc.	Wealth Mgm't	East Sound	\$30
328	Seattle Asset Mgm't, Inc.	Wealth Mgm't	Bainbridge Island	\$17
183	Seattle Wealth Management, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$136
346	Securian Advisors NW(Securian Fin Svcs Inc)	Financial Planning/Insurance	Bellevue	\$10
222	Selkirk Wealth Advisors, LLC	Wealth Mgm't	Spokane	\$84
141	Seneschal Advisors, LLC	Wealth Mgm't	Tacoma	\$225
237	Sherwood Investments	Wealth Mgm't	Redmond	\$68
349	Signal Financial Planning, LLC	Wealth Mgm't	Issaquah	\$9
240	Signia Capital Management, LLC	Institutional Money Mgm't/Value	Spokane	\$66
98	Silver Creek Capital Mgm't, LLC	Hedge Fund Mgm't	Seattle	\$379
257	Simple Wealth, LLC	Wealth Mgm't	Spokane	\$57
354	Singer Wealth Management	Wealth Mgm't	Seattle	\$7
343	Sitka Pacific Capital Management, LLC	Wealth Mgm't	Edmonds	\$11
125	Skyline Advisors, Inc.	Wealth Mgm't	Bellingham	\$259
155	Smart Portfolios, LLC	Wealth Mgm't	Lake Forest Park	\$195
103	Snider Financial Group	Wealth Mgm't	Bellevue	\$353

110	Sonata Capital Group, Inc.	Wealth Mgm't	Seattle	\$322
309	Sound Financial Center	Wealth Mgm't	Sequim	\$23
347	Sound Financial Investments, Inc.	Wealth Mgm't	Tacoma	\$10
219	Sound Financial Planning, Inc.	Wealth Mgm't	Mt. Vernon	\$86
285	Sound Investment Strategies, Inc.	Wealth Mgm't	Bothell	\$36
314	Sound Legacy Wealth Advisors, LLC	Wealth Mgm't	Bellevue	\$22
60	Soundmark Wealth Management, LLC	Wealth Mgm't	Kirkland	\$832
108	Soundview Advisors	Wealth Mgm't	Seattle/Olympia	\$337
117	Sovereign Wealth Advisors, Inc.	Wealth Mgm't	Bellevue	\$280
198	Stapp Wealth Management, PLLC	Wealth Mgm't/Tax Services	Olympia	\$113
34	Steelhead Partners, LLC	Hedge Fund Mgm't	Seattle	\$2,566
331	Steward Capital, LLC	Wealth Mgm't	Bellevue	\$16
256	Stewardship Concepts Financial Services, LLC	Wealth Mgm't	Spokane	\$58
217	Stock Mgm't, LLC	Wealth Mgm't	Puyallup	\$87
164	Stolz & Associates, PS	Wealth Mgm't	Tacoma	\$168
292	Stonebridge Capital Management NW, LLC	Wealth Mgm't	Gig Harbor	\$31
364	Strategic Asset Management	Wealth Mgm't	Tacoma	\$3
42	Strategic Income Management, LLC	Money Mgm't/Mutual Fund Mgrs.	Seattle	\$1,352
70	Strategic Wealth Mgm't, Inc.	Wealth Mgm't/Native Amer. Tribes	Kirkland	\$623
373	Summit Family Office Services, LLC	Wealth Mgm't	Bellevue	\$2
375	Synergos Advisory	Wealth Mgm't	Seattle	\$2
85	Synergy Asset Mgm't, LLC	Wealth Mgm't	Bellevue	\$468
289	Tacoma Investment Group	Wealth Mgm't	Tacoma	\$35
25	Taiyo Pacific Partners L.P.	Hedge Fund Mgm't	Kirkland	\$3,465
68	Talbot Financial, LLC	Wealth Mgm't	Bellevue	\$645
57	Ten Capital Investment Advisors, LLC	Wealth Mgm't	Spokane	\$865
253	Tenere, LLC	Wealth Mgm't	Issaquah	\$60
208	TFS Advisors, LLC	Wealth Mgm't	Edmonds	\$103
276	The Boyle Group Wealth Management	Wealth Mgm't	Seattle	\$43
37	The Caprock Group, Inc.	Wealth Mgm't	Mercer Island/Idaho/Calif.	\$1,800
32	The Clarius Group, LLC	Wealth Mgm't	Bellevue	\$2,807
28	The Pacific Financial Group, Inc.	Wealth Mgm't	Bellevue	\$3,157
174	The Planner's Edge, LLC	Wealth Mgm't	Mercer Island	\$145
124	The Retirement Solution, Inc.	Wealth Mgm't	Redmond	\$263
251	Therese Govern Financial Advisors, LLC	Wealth Mgm't	Seattle	\$61
301	Thome Financial	Wealth Mgm't	Bellevue	\$27
357	Thornewood Advisors USA, LLC	Wealth Mgm't	Tacoma	\$5
26	Tiedemann Advisors, LLC	Wealth Mgm't/Family Office Svcs.	Seattle/NY/Multi-state	\$3,347
153	Tieton Capital Management, LLC	Money Manager, Small Cap. Val.	Yakima	\$200
284	Timepiece Financial Planning, Inc.	Wealth Mgm't	Vancouver	\$38
362	Tracker Research, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$3
49	Tradewinds Capital Management, LLC	Wealth Mgm't	Bellingham/Shoreline	\$1,010
307	Trail Financial Planning, LLC	Wealth Mgm't	Bellingham	\$24
90	Trellis Advisors, LLC	Wealth Mgm't	Seattle/Ellensburg	\$440
166	TrueNorth Wealth Advisors	Wealth Mgm't	Seattle	\$157
58	Trutina Financial	Wealth Mgm't	Bellevue	\$859
179	Turloff Financial Consulting, Inc.	Wealth Mgm't	Bainbridge Island	\$140

356	Twight Financial Education, LLC	Wealth Mgm't	Seattle	\$5
136	Unionview Wealth Partners	Wealth Mgm't	Seattle	\$230
366	Unleashed Financial, LLC	Wealth Mgm't	Kirkland	\$3
361	Vail Ridge Capital, LLC	Wealth Mgm't	Bellingham	\$4
9	Verus Advisory, Inc.(prev. Wurts & Assoc.)	Wealth Mgm't/Pension & Profit Sh.	Seattle/L.A./S.F.	\$8,295
312	Viceroy Investment Advisors LLC	Wealth Mgm't	Everett	\$22
191	Viewpoint Capital Management	Wealth Mgm't	Seattle	\$125
63	Viridian RIA, LLC	Wealth Mgm't	Seattle	\$774
308	Vorpahl Wing Securities, Inc.	Wealth Mgm't	Spokane	\$23
303	Waits Investments, LLC	Wealth Mgm't	Spokane	\$26
214	Warga Asset Mgm't	Wealth Mgm't	Kirkland	\$97
10	Washington Capital Mgm't, Inc.	Wealth Mgm't	Seattle/OR/CA/MA	\$8,017
325	WaterHill Capital, LLC	Wealth/Hedge Fund Mgm't	Kenmore	\$19
184	Waycross Investment Mgm't Company	Wealth Mgm't	Bellingham	\$135
134	Wayfinding Financial, LLC	Wealth Mgm't	Lynnwood	\$232
143	Wealth Asset Managers/Nelson Securities	Wealth Mgm't	Spokane	\$215
278	Wealth-Builders, Inc.	Wealth Mgm't/Tax Services	Bellevue	\$42
207	WealthCollab	Wealth Mgm't	Bellevue	\$104
209	Wealthmark, LLC	Wealth Mgm't	Bellingham	\$102
313	Westface Financial Advisory	Wealth Mgm't	Vancouver	\$22
39	WestRiver Management, LLC	Wealth/Hedge Fund Mgm't	Kirkland	\$1,527
223	White & Company Financial Planning, Inc.	Wealth Mgm't	Sunnyside	\$83
186	Wilhelm Financial Services, PLLC	Wealth Mgm't	Olympia	\$134
340	Wilkison Investment Services, LLC	Wealth Mgm't	Snoqualmie	\$12
310	Wright Wealth Management, LLC	Wealth Mgm't	Issaquah	\$23
15	Zevenbergen Capital Investments LLC	Wealth Mgm't	Seattle	\$5,820

Last edited on: 1/15/22 at 1:00 pm Total AUM = \$1,212,280,000,000