



# RAH Financial

Financial Staffing Solutions

## 2018 Washington State Money Managers Ranking List (by AUM)

Total AUM: \$940,943,000,000 (updated 1/22/19)

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

### Financial Services Executive Recruiting

Roger A. Hendrix, Sr.

President

(253) 277-3731 Office

(206) 679-5955 Mobile

(253) 981-4939 Fax

E-mail: [roger@RAHfinancial.com](mailto:roger@RAHfinancial.com)

Web Site: [www.RAHfinancial.com](http://www.RAHfinancial.com)

### Assets are in millions and are as of January 22, 2019

Rank	Manager	Manager Type	City	Assets
1	Russell Investment Group	Money Management	Seattle	<b>\$287,300</b>
2	Parametric Portfolio Associates	Money Mgm't/Mutual Fund Spec.	Seattle	\$225,128
3	Fisher Investments	Wealth Mgm't	Camas	<b>\$96,032</b>
4	Milliman, Inc.	Wealth Mgm't/Pension Consultants	Seattle/Multiple Offices	<b>\$38,801</b>
5	Edge Asset Mgm't Inc.	Money Mgm't/Mutual Fund Mgrs.	Seattle	\$35,400
6	Prime Advisors, Inc.	Wealth Mgm't/Inst Fixed Inc. Mgrs.	Redmond/Windsor, CT	<b>\$17,128</b>
7	Financial Advocates Investment Mgm't	Wealth Mgm't/Broker-Dealer/RIA	Olympia, Portland	\$11,097
8	Wells Fargo Wealth Management Group	Wealth/Trust Mgm't	Seattle/Tacoma/Bellevue	\$9,408
9	KMS Financial Services, Inc.	Broker Dealer, Investm't Advisor	Seattle	<b>\$6,793</b>
10	Silver Creek Capital Mgm't, LLC	Hedge Fund Mgm't	Seattle	\$6,685
11	Pugh Capital Mgm't, Inc.	Institutional Fixed Inc. Money Mgr	Seattle	<b>\$6,131</b>
12	UBS Financial Services, Inc.	Wealth Mgm't/Broker-Dealer	Seattle/Bellevue	\$6,000
13	Washington Capital Mgm't, Inc.	Wealth Mgm't	Seattle	<b>\$5,756</b>
14	Aptitude Investment Management L.P.	Hedge Fund/Pens./Profit-Sharing	Seattle/Canada	<b>\$5,420</b>
15	Washington Trust Bank	Wealth Mgm't/Advisory Services	Ptld/Stle/Spkn/Blvue/Boise	<b>\$5,280</b>
16	U.S. Trust/Bank of America	Wealth/Trust Mgm't	Seattle/Multi-state Offices	\$5,250
17	Columbia Pacific Wealth Mgm't	Wealth Mgm't	Seattle	<b>\$5,123</b>
18	US Bank Private Client Group	Wealth/Trust Mgm't	PrtInd/Seattle/Cour de L'ne	\$5,100
19	Brighton Jones, LLC	Wealth Mgm't	Seattle/SF/AZ/DC	<b>\$4,961</b>
20	Verus Advisory, Inc.(prev. Wurts & Assoc.)	Wealth Mgm't/Pension & Profit Sh.	Seattle	<b>\$4,867</b>
21	Freestone Capital Mgm't, LLC	Wealth/Hedge Fund Mgm't	Seattle	<b>\$4,328</b>
22	Laird Norton W'lth Mgm't(Strat./Trust Co, LLC)	Wealth Mgm't	Seattle	<b>\$4,118</b>
23	Cornerstone Advisors, Inc.	Wealth Mgm't/Family Office Svcs.	Bellevue	\$3,701

24	Pacific Portfolio Consulting, LLC	Wealth Mgm't	Seattle	<b>\$3,649</b>
25	Baird Investment Group/Robert W. Baird & Co.	Broker Dealer, Investm't Advisor	Seattle/Yakima/Mt. Vernon	\$3,553
26	Saturna Capital Corporation	Money Mgm't/Mut'l Fnd Spec/B-Dlr	Bellingham	<b>\$3,438</b>
27	Tiedemann Advisors, LLC	Wealth Mgm't/Family Office Svcs.	Seattle/NY/Multi-state	<b>\$3,363</b>
28	BNY Mellon Wealth Mgm't	Wealth/Trust Mgm't	Seattle/Tacoma	\$3,300
29	Oppenheimer & Co., Inc.	Wealth Mgm't	Seattle/Multi-Office	<b>\$3,235</b>
30	SNW Asset Mgm't, LLC	Fixed Inc Asset Manager	Seattle/Portland/S.F.	<b>\$2,970</b>
31	Badgley Phelps Wealth Managers	Wealth Mgm't	Seattle	<b>\$2,657</b>
32	Merriman Wealth Management, LLC	Wealth Mgm't	Seattle/Spokane/Eugene	<b>\$2,653</b>
33	Coldstream Holdings, Inc.	Wealth Mgm't	Bellevue	\$2,628
34	McCutchen Group, LLC	Wealth Mgm't	Seattle	<b>\$2,600</b>
35	The Pacific Financial Group	Wealth Mgm't	Bellevue	<b>\$2,551</b>
36	Northern Trust Bank	Wealth/Trust Mgm't	Seattle	\$2,500
37	Zevenbergen Capital Investments, LLC	Wealth Mgm't	Seattle	\$2,427
38	Taiyo Pacific Partners L.P.	Hedge Fund Mgm't	Kirkland	\$2,400
39	Moss Adams Wealth Advisors	Wealth Mgm't	Seattle/Everett/Tac/Yakima	<b>\$2,353</b>
40	Evergreen Gavekal	Wealth Mgm't	Bellevue	<b>\$2,297</b>
41	Smead Capital Management, Inc.	Money Mgm't/Mutual Fund Mgrs.	Seattle	<b>\$2,265</b>
42	Key Private Bank	Wealth/Trust Mgm't	Seattle/Tac/Blvue/Bellghm	\$2,226
43	Goldman, Sachs & Co.	Wealth Mgm't	Seattle	\$2,000
44	AllianceBernstein LP	Wealth Mgm't/Broker-Dealer	Seattle	\$1,900
45	National Asset Mgm't, Inc.	Wealth Mgm't/Broker-Dealer	Seattle/Multi-state Offices	<b>\$1,770</b>
46	D'Annunzio Consulting Group, LLC	Wealth Mgm't	Tacoma	\$1,760
47	WestRiver Management, LLC	Wealth/Hedge Fund Mgm't	Kirkland	<b>\$1,746</b>
48	Filament, LLC	Wealth Mgm't	Seattle	<b>\$1,738</b>
49	United Capital Seattle/Paragon	Wealth Mgm't/RIA	Seattle/Multi Office	\$1,645
50	Columbia Pacific Advisors, LLC	Hedge Fund Mgm't	Seattle	<b>\$1,623</b>
51	Barwick & Partners, Inc.	Wealth Mgm't	Seattle	<b>\$1,607</b>
52	Steelhead Partners, LLC	Hedge Fund Mgm't	Seattle	<b>\$1,599</b>
53	Empirical Wealth Mgm't, LLC	Wealth Mgm't	Seat/Blvu/Spok'n/AK/CA/OR	<b>\$1,522</b>
54	Northwest Asset Management	Wealth Mgm't	Mercer Island	<b>\$1,522</b>
55	Blackrock, Inc. (formerly Quellos)	Wealth Mgm't/Alternative Investm.	Seattle/Multiple Offices	\$1,500
56	Strategic Income Management, LLC	Money Mgm't/Mutual Fund Mgrs.	Seattle	<b>\$1,428</b>
57	Columbia Bank Wealth Management	Wealth/Trust Mgm't	Seattle/Tacoma/Portland	\$1,340
58	The Caprock Group, Inc.	Wealth Mgm't	Mercer Island/Idaho/Calif.	<b>\$1,200</b>
59	Kunath Karren Rinne & Atkin, LLC	Wealth Mgm't	Seattle	<b>\$1,200</b>
60	Bristlecone Advisors, LLC	Wealth Mgm't	Seattle	<b>\$1,192</b>
61	The Clarius Group, LLC	Wealth Mgm't	Bellevue	<b>\$1,138</b>
62	Union Bank	Wealth/Trust Mgm't	Portland/Seattle/Tacoma	\$1,050
63	Garde Capital, Inc.	Wealth Mgm't	Seattle	\$1,043
64	Citi Private Bank	Wealth Mgm't	Seattle	\$1,000
65	RBC Capital Markets, LLC	Wealth Mgm't	Multiple Offices	\$1,000
66	Mountain Pacific Advisors, LLC	Hedge Fund/Pens./Profit-Sharing	Bellevue	<b>\$983</b>
67	Paracle Advisors, LLC	Wealth Mgm't	Mercer Island	<b>\$873</b>
68	Greene Wealth Management, LLC	Wealth Mgm't	Seattle	<b>\$855</b>
69	SEI Huntington Steele, LLC	Wealth Mgm't	Seattle/PA	<b>\$848</b>
70	Rainier Investment Mgm't, Inc.	Money Mgm't/Mutual Fund Mgrs.	Seattle	\$827

71	Blackcrane Capital	Wealth/Hedge Fund Mgm't	Bellevue	<b>\$813</b>
72	Kosmos Management, LLC	Wealth/Hedge Fund Mgm't	Seattle	<b>\$781</b>
73	Cutler Investment Counsel, LLC	Wealth Mgm't/Mutual Funds	Seattle/OR/VA	\$767
74	Tradewinds Capital Management, LLC	Wealth Mgm't	Bellingham/Shoreline	\$744
75	Acuitas Investments, LLC	Money Management/Mutual Funds	Seattle	<b>\$738</b>
76	Petersen Hastings Investment Mgm't, Inc.	Wealth Mgm't	Kennewick	\$684
77	Soundmark Wealth Management, LLC	Wealth Mgm't	Kirkland	<b>\$681</b>
78	Trutina Financial	Wealth Mgm't	Bellevue	<b>\$650</b>
79	Lucid Advisors, Inc.	Wealth Mgm't	Seattle	<b>\$635</b>
80	Benchmark Plus Management, LLC	Wealth/Hedge Fund Mgm't	Tacoma/New Jersey	\$591
81	BMO Private Bank (formerly The Harris)	Wealth/Trust Mgm't	Seattle	\$576
82	First Pacific Financial, Inc.	Wealth Mgm't	Vancouver	<b>\$573</b>
83	Capital Planning, LLC	Wealth Mgm't	Bellevue	<b>\$556</b>
84	E.K. Riley Investments, LLC	Wealth Mgm't	Seattle	<b>\$553</b>
85	Highland Private Wealth Mgm't	Wealth Mgm't	Bellevue	<b>\$540</b>
86	Auxano Advisors, LLC	Wealth Mgm't	Kirkland	<b>\$536</b>
87	Kiley Juergens Wealth Management, LLC	Wealth Mgm't	Olympia	<b>\$515</b>
88	Viridian RIA, LLC	Wealth Mgm't	Seattle	<b>\$509</b>
89	Private Income Capital Management	Wealth Mgm't	Seattle	\$500
90	Mercer Global Advisors, Inc.	Wealth Mgm't	Bellevue/Multi-state	\$500
91	D.A. Davidson & Co.	Broker Dealer, Investm't Advisor	WA/MT/NE/CA	\$500
92	Hightower Advisors, LLC (prev. Triad Wealth)	Wealth Mgm't	Bellevue	\$491
93	Raymond James Financial Services, Inc.	Broker Dealer, Investm't Advisor	Multiple OfficesMill Creek	<b>\$490</b>
94	Conlon & Dart, LLC	Wealth Mgm't	Seattle	<b>\$487</b>
95	Leonard Rickey Investment Advisors, PLLC	Wealth Mgm't	Yakima	<b>\$480</b>
96	Fulcrum Capital, LLC	Wealth Mgm't	Seattle	<b>\$479</b>
97	Newfocus Financial Group, LLC	Wealth Mgm't	Vancouver/Portland/S.F.	<b>\$478</b>
98	Sweetwater Investments, Inc.	Wealth Mgm't/Native Amer. Tribes	Redmond	\$465
99	Financial Plan, Inc.	Wealth Mgm't	Bellingham	<b>\$451</b>
100	Financial Resources Group	Wealth Mgm't	Bellevue	<b>\$434</b>
101	Strategic Wealth Mgm't, Inc.	Wealth Mgm't/Native Amer. Tribes	Kirkland	<b>\$425</b>
102	Vestory, LLC	Wealth Mgm't	Blvue,Lakew'd,Scottsdale	<b>\$415</b>
103	Ophrys, LLC	Wealth/Hedge Fund Mgm't	Seattle	<b>\$408</b>
104	Hart Capital Management, Inc.	Wealth Mgm't	Spokane/Idaho	<b>\$400</b>
105	Personal Investment Mgm't, Inc.	Wealth Mgm't	Redmond	<b>\$397</b>
106	Avier Wealth Advisors	Wealth Mgm't	Bellevue/Lake Oswego,OR	<b>\$389</b>
107	Northwest Administrators, Inc.	Pension/Trust Administration	Seattle	<b>\$385</b>
108	Great Northern Asset Management, LLC	Wealth Mgm't	Vancouver	\$380
109	Schmidt Financial Group, Inc.	Wealth Mgm't	Kirkland/Mtn View, CA	<b>\$379</b>
110	Duncan & Haley, LTD	Wealth Mgm't	Seattle	<b>\$376</b>
111	James R. Martin Consulting, Inc.	Wealth Mgm't/Consulting Svcs.	Vancouver	<b>\$367</b>
112	Elite Wealth Management, Inc.	Wealth Mgm't	Kirkland	<b>\$356</b>
113	Financial Management, Inc.	Wealth Mgm't	Ykma/Kenwk/Spkn/Wnatch	<b>\$354</b>
114	Northwest Investment Consulting, Inc.	Wealth Mgm't	Seattle	\$353
115	Palouse Capital Mgm't, Inc. (prev.Ken Roberts)	Wealth Mgm't	Spokane	<b>\$348</b>
116	Conover Capital Management, LLC	Wealth Mgm't	Bellevue	<b>\$342</b>
117	Columbia River Advisors, LLC	Wealth Mgm't	Tacoma	\$335

118	Signator Investor, Inc.(unit of John Hancock)	Wealth Mgm't/Insurance/Brkr-Dlr	Bellevue/MT/UT/FL	\$335
119	Financial Insights, Inc.	Wealth Mgm't	Tacoma	\$332
120	Private Ocean	Wealth Mgm't	Seattle/CA	\$328
121	Quantum Financial Planning Services, Inc.	Wealth Mgm't	Spokane	\$317
122	Kutscher Benner Barsness & Stevens, Inc.	Wealth Mgm't	Seattle	\$316
123	Umpqua Investments, Inc.	Wealth/Trust Mgm't	OR/CA/WA	\$313
124	Private Advisory Group	Wealth Mgm't	Redmond	\$309
125	HBC Financial Services, PLLC	Wealth Mgm't/Tax Services	Seattle	\$309
126	McIlrath and Eck, LLC	Wealth Mgm't	Arlington	\$304
127	Canterbury Consulting, Inc.	Wealth Mgm't	Seattle/CA	\$300
128	Comerica Bank & Trust	Wealth Mgm't	Seattle/Bellevue	\$300
129	Fiduciary Counselling, Inc.	Wealth Mgm't	Tacoma	\$300
130	JP Morgan Private Bank (AUM estimate only)	Wealth/Trust Mgm't	Seattle	\$300
131	Northern Capital Management, Inc.	Wealth Mgm't	Spokane	\$299
132	Marshall & Sullivan, Inc.	Wealth Mgm't	Seattle	\$295
133	Ten Capital Investment Advisors, LLC	Wealth Mgm't	Spokane	\$291
134	Highbury Pacific Capital Corp.	Wealth Mgm't	Seattle	\$289
135	Harbour Investment Mgm't, LLC	Wealth Mgm't	Edmonds	\$285
136	Robinswood Financial, LLC	Wealth Mgm't	Kirkland	\$282
137	Conway Jarvis & Associates, LLC	Wealth Mgm't	Seattle	\$279
138	ASI Wealth Management	Wealth Mgm't	Seattle & 3 Oregon Offices	\$278
139	Lakeside Advisors, Inc.	Wealth Mgm't	Seattle	\$278
140	Evergreen Pacific Partners Mgm't Co., Inc.	Hedge Fund Mgm't	Seattle	\$277
141	Pacific Current Group	Hedge Fund Mgm't	Seattle/Tacoma	\$273
142	Comprehensive Wealth Mgm't	Wealth Mgm't	Lynnwood	\$259
143	Trellis Advisors, LLC	Wealth Mgm't	Seattle/Ellensburg	\$259
144	Vickerman & Driscoll Financial Advisors, Inc.	Wealth Mgm't/Tax Services	Spokane	\$247
145	Garland Capital Mgm't, Inc.	Wealth Mgm't	Bellevue	\$240
146	Sonata Capital Group, Inc.	Wealth Mgm't	Seattle	\$238
147	Soundview Advisors	Wealth Mgm't	Seattle/Olympia	\$233
148	Sovereign Wealth Advisors, Inc.	Wealth Mgm't	Bellevue	\$218
149	Oliver Capital Mgm't, Inc.	Wealth Mgm't	Seattle	\$217
150	Etesian Wealth Advisors, Inc.	Wealth Mgm't	Spokane/Portland	\$214
151	Lincoln Investment Plng (IA's Tremper & Roper)	Wealth Mgm't	Renton	\$212
152	Bellevue Asset Mgm't, LLC	Wealth Mgm't	Bellevue	\$212
153	Bogdanovich Wealth Management, PLLC	Wealth Mgm't	Edmonds	\$212
154	Dental Wealth Advisors, LLC	Wealth Mgm't	Kirkland	\$210
155	Chaney Capital Mgm't	Wealth Mgm't	Lynnwood	\$210
156	BAC Capital Advisors, LLC	Wealth Mgm't/Pension & Profit Sh.	Seattle	\$209
157	Elliott Cove Cap. Mgm't	Wealth Mgm't	Seattle	\$207
158	Ramsey & Associates, Inc.	Wealth Mgm't	Seattle	\$205
159	Talbot Financial, LLC	Wealth Mgm't	Bellevue	\$204
160	Pacific Asset Mgm't, LLC	Wealth Mgm't	Pt Orchard/Gig Hbr/Shelton	\$198
161	Lesa Sroufe & Company, Inc.	Wealth Mgm't	Seattle	\$196
162	Leader Capital Corp.	Money Mgm't/Mutual Fund Spec.	Vancouver/Portland/CA	\$194
163	Integrity Financial Corp.	Wealth Mgm't/Consulting Svcs.	Bellevue/CA/FLA/OR	\$191
164	Financial Services International Corp.	Broker Dealer, Investm't Advisor	Seattle/Edmonds/Kirkland	\$190

165	Synergy Financial Mgm't, LLC	Wealth Mgm't	Seattle	\$190
166	Miller Advisors, Inc.	Wealth Mgm't	Kirkland	<b>\$189</b>
167	S.R. Schill & Assoc., Inc.	Wealth Mgm't	Mercer Island	\$186
168	Lattice Capital Management, LLC	Hedge Fund Mgm't	Kirkland	<b>\$186</b>
169	Portfolio Strategies, Inc.	Wealth Mgm't	Tacoma	\$183
170	Smart Portfolios, LLC	Wealth Mgm't	Lake Forest Park	<b>\$181</b>
171	Runde & Co., LLC	Wealth Mgm't	Seattle	<b>\$175</b>
172	Glacier Peak Capital, LLC	Hedge Fund Mgm't	Bellevue	\$174
173	Boone Wealth Advisors, LLC	Wealth Mgm't	Bellevue	<b>\$170</b>
174	Madrona Financial Services, LLC	Wealth Mgm't	Everett/Blvue/Seattle	\$166
175	Skyline Advisors, Inc.	Wealth Mgm't	Bellingham	<b>\$163</b>
176	Archon Capital Mgm't, LLC	Hedge Fund Mgm't	Seattle	\$158
177	Breakwater Investment Management	Wealth Mgm't	Seattle	<b>\$151</b>
178	Madison Park Capital Advisors, LLC	Wealth Mgm't	Seattle	\$149
179	Argentus Advisors, LLC (Sound Wlth Partners)	Wealth Mgm't	Gig Harbor	\$148
180	Seneschal Advisors, LLC	Wealth Mgm't	University Place	<b>\$146</b>
181	Harvest Capital Advisors, Inc.	Wealth Mgm't	Bellevue	\$144
182	Snider Financial Group	Wealth Mgm't	Bellevue	<b>\$140</b>
183	ICM Asset Mgm't, Inc.	Wealth/Hedge Fund Mgm't	Spokane	\$139
184	Jarvis Financial Services, Inc.	Wealth Mgm't	Federal Way	<b>\$138</b>
185	Investor's Fiduciary Advisor Network, LLC	Wealth Mgm't	Snoqualmie	<b>\$137</b>
186	DH Partners, LLC	Wealth Mgm't	Seattle	\$136
187	Helm Capital Management, LLC	Wealth Mgm't/Hedge Fund	Seattle	<b>\$133</b>
188	Hamrick Investment Counsel, LLC	Wealth Mgm't	Seattle	\$132
189	Olson Investment Advisors, LLC	Wealth Mgm't	Seattle	<b>\$130</b>
190	Christensen, King & Assoc. Investment Svcs.	Wealth Mgm't	Richland	<b>\$130</b>
191	Agate Pass Investment, LLC	Wealth Mgm't	Bainbridge Island	<b>\$130</b>
192	Wealth Asset Managers/Nelson Securities	Wealth Mgm't	Spokane	<b>\$129</b>
193	Demars Financial Group	Wealth Mgm't	Spokane, Logan, UT	<b>\$127</b>
194	Halbert Hargrove	Wealth Mgm't	Bellevue/Multi-state	\$125
195	Evans Capital Mgm't Associates	Wealth Mgm't/Insurance	Seattle/Bellevue	<b>\$125</b>
196	Hallett & Associates, P.S.	Wealth Mgm't	Port Angeles	<b>\$124</b>
197	The Retirement Solution, Inc.	Wealth Mgm't	Redmond	<b>\$124</b>
198	Private Asset Mgm't	Wealth Mgm't	Kirkland	<b>\$123</b>
199	Buckley Investment Group, LLC	Wealth Mgm't	Walla Walla	\$122
200	Nierenberg Investment Management Company, Inc	Wealth/Hedge Fund Mgm't	Camas	<b>\$118</b>
201	Sapphire Star Capital, LLC	Wealth/Hedge Fund Mgm't	Kirkland	<b>\$118</b>
202	Signia Capital Management, LLC	Institutional Money Mgm't/Value	Spokane	<b>\$115</b>
203	Vita Intellectus	Wealth Mgm't	Kirkland	<b>\$115</b>
204	Asset Planning & Management, Inc.	Wealth Mgm't	Spokane	<b>\$113</b>
205	Sander Capital Advisors	Wealth Mgm't	Seattle	\$112
206	Williams Palmer, LLC	Wealth Mgm't	Bellevue/Scottsdale AZ	<b>\$112</b>
207	Bear Mountain Capital	Private Fund Mgm't	Seattle	<b>\$112</b>
208	Kaufman Kampe Advisors, LLC	Wealth Mgm't	Mercer Island	<b>\$111</b>
209	Tieton Capital Management, LLC	Money Manager, Small Cap. Val.	Yakima	\$110
210	Helmsman Financial Group, LLC	Wealth Mgm't, Tax/Fin. Services	Woodinville	<b>\$110</b>
211	Kaizen Financial Advisors, LLC	Wealth Mgm't	Bellevue	<b>\$109</b>

212	McBride Financial Advisors, LLC	Wealth Mgm't	Seattle	\$108
213	Fort Vancouver Investment Management, LLC	Wealth Mgm't	Vancouver/Portland	<b>\$108</b>
214	Moser Wealth Advisors, LLC	Wealth Mgm't/Tax Services	Bellevue	<b>\$107</b>
215	Warga Asset Mgm't	Wealth Mgm't	Kirkland	<b>\$106</b>
216	The Planner's Edge	Wealth Mgm't	Mercer Island	<b>\$106</b>
217	Richards, Merrill & Peterson, Inc.	Wealth Mgm't	Spokane	\$105
218	Hot Creek Capital, LLC	Wealth Mgm't	Seattle	\$105
219	Wilhelm Financial Services, PLLC	Wealth Mgm't	Olympia	<b>\$105</b>
220	Olympic Wealth Management, LLC	Wealth Mgm't	Bothell	<b>\$105</b>
221	Harlow Wealth Management, Inc.	Tax Services	Vancouver	\$103
222	BHJ Wealth Advisors	Wealth Mgm't	Gig Harbor	<b>\$103</b>
223	MassMutual Financial Group	Investment Mgm't/Insurance	Bellevue	\$100
224	Waycross Investment Mgm't Company	Wealth Mgm't	Bellingham	<b>\$99</b>
225	TrueNorth Wealth Advisors	Wealth Mgm't	Seattle	<b>\$99</b>
226	Newground Social Investment	Wealth Mgm't	Seattle	<b>\$97</b>
227	Johnson & Shute Investment Advisors, Inc.	Wealth Mgm't/Tax Services	Bellevue	<b>\$96</b>
228	Eagle Harbor Asset Mgm't	Wealth Mgm't	Seattle	<b>\$94</b>
229	Aviso Wealth Management	Wealth Mgm't	Seattle/PA/ME/MD	<b>\$94</b>
230	Gregory Lyle & Company	Wealth Mgm't	Clinton	<b>\$93</b>
231	Viewpoint Capital Management, LLC	Wealth Mgm't	Seattle	<b>\$93</b>
232	Columbia Advisory Partners, LLC	Wealth Mgm't	Spokane	<b>\$90</b>
233	BBJS Financial Advisors, LLC	Wealth Mgm't	Seattle	<b>\$87</b>
234	Cadence Wealth Management	Wealth Mgm't	Seattle	<b>\$86</b>
235	Turloff Financial Consulting, Inc.	Wealth Mgm't	Bainbridge Island	<b>\$83</b>
236	Stolz & Associates, PS	Wealth Mgm't	Tacoma	<b>\$83</b>
237	United Capital Financial Advisers	Insurance/Financial Planning	Lynnwd/SeattleMulti-state	\$82
238	Flohr Asset Management, LLC	Wealth Mgm't/Hedge Fund	Bellevue	\$82
239	TFS Advisors, LLC	Wealth Mgm't	Edmonds	<b>\$82</b>
240	John T. McCarthy, LLC	Wealth Mgm't	Spokane	\$81
241	Murphy Investment Management, LLC	Wealth Mgm't	Spokane	<b>\$80</b>
242	Byrne & Company Wealth Management	Wealth Mgm't	Olympia	<b>\$73</b>
243	Pengra Capital Mgm't, Inc.	Wealth Mgm't/Hedge Fund	Seattle	<b>\$73</b>
244	Stapp Financial Planning, PLLC	Wealth Mgm't/Tax Services	Olympia	<b>\$73</b>
245	Allison Spielman Advisors/Allison Miller, LLC	Wealth Mgm't	Bellevue	<b>\$73</b>
246	Stock Mgm't, LLC	Wealth Mgm't	Puyallup	\$71
247	Investors Portfolio Services, LLC	Wealth Mgm't	Puyallup	\$70
248	Fairview Partners Investment Mgm't, LLC	Hedge Fund Mgm't	Seattle	<b>\$69</b>
249	Monson Wealth Management, Inc.	Wealth Mgm't	Kennewick	<b>\$68</b>
250	Alliant Securities, Inc.	Wealth Mgm't	Liberty Lake/Spokane	<b>\$68</b>
251	Investor Resources, Inc.	Wealth Mgm't	Bellevue/Port Orchard	<b>\$66</b>
252	White & Company Financial Planning, Inc.	Wealth Mgm't	Sunnyside	<b>\$65</b>
253	Peterson Investment Mgm't, Inc.	Wealth Mgm't	Spokane	<b>\$65</b>
254	Selkirk Wealth Advisors, LLC	Wealth Mgm't	Spokane	<b>\$65</b>
255	Kairos Capital Management, LLC	Wealth Mgm't	Bellevue	\$62
256	Wealthmark, LLC	Wealth Mgm't	Bellingham	<b>\$62</b>
257	Financial Research, Inc.	Wealth Mgm't	Issaquah	<b>\$61</b>
258	Sound Financial Planning, Inc.	Wealth Mgm't	Mt. Vernon	<b>\$60</b>

259	Meridan Capital, LLC	Wealth/Hedge Fund Mgm't	Bellevue	\$60
260	NR Smith & Associates, P.S.	Wealth Mgm't/Tax Services	Olympia	\$59
261	Professional Investment Management Services, PI	Wealth Mgm't	Bellevue	<b>\$58</b>
262	Goldbloom Wealth Management, LLC	Wealth Mgm't	Bellevue	<b>\$57</b>
263	Mangan Wealth Management	Wealth Mgm't	Seattle	<b>\$57</b>
264	Renaissance Wealth Counsel, LLC	Wealth Mgm't/Tax Services	Bellevue	<b>\$56</b>
265	Seattle Portfolio Company	Wealth Mgm't	Seattle	<b>\$56</b>
266	Informed Investors Group	Wealth Mgm't/Socially Resp. Inv.	Seattle	<b>\$55</b>
267	Hawkins Investment Counsel, LLC	Wealth Mgm't	Port Orchard	<b>\$54</b>
268	Bellingham Capital	Wealth Mgm't	Bellingham/Anacortes	<b>\$54</b>
269	Ragnar Wealth Management, LLC	Wealth Mgm't	Tumwater/Bellingham	\$52
270	Integrity Wealth Management, Inc.	Wealth Mgm't	Spokane	<b>\$52</b>
271	Mercer Asset Mgm't, Inc.	Wealth Mgm't	Bainbridge Island	<b>\$51</b>
272	Kerwin-Beley Associates, Inc.	Wealth Mgm't	Seattle	\$50
273	Paysse Jennison, Inc.	Wealth Mgm't	Mercer Island	<b>\$50</b>
274	Helium Advisors, LLC	Wealth Mgm't	Bellevue	<b>\$50</b>
275	Sabin Investment Management, Inc.	Wealth Mgm't	Gig Harbor	<b>\$50</b>
276	Prentice Financial Planning, LLC	Wealth Mgm't	Olympia	\$50
277	Sherwood Investment Services	Wealth Mgm't	Redmond	<b>\$49</b>
278	Moore Wealth Management, LLC	Wealth Mgm't	Renton	<b>\$49</b>
279	Pacific Crest Financial Advisors, LLC	Wealth Mgm't/Inv. Advisors	Everett/Seattle	<b>\$49</b>
280	Griffiths, Dreher & Evans, PS, CPAs	Wealth Mgm't/Tax Services	Spokane	<b>\$48</b>
281	Simple Wealth, LLC	Wealth Mgm't	Spokane	<b>\$47</b>
282	Evergreen Wealth Management Services, Inc.	Wealth Mgm't	Port Ludlow	<b>\$46</b>
283	R. Brian Howell & Associates, Inc.	Wealth Mgm't	Tacoma	<b>\$46</b>
284	Commencement Financial Planning, LLC	Wealth Mgm't	Tacoma	<b>\$45</b>
285	Stewardship Concepts	Wealth Mgm't	Spokane	<b>\$44</b>
286	Bortel Investment Management, LLC	Hedge Fund Mgm't	Gig Harbor	<b>\$43</b>
287	Therese Govern Financial Advisors, LLC	Wealth Mgm't	Seattle	<b>\$43</b>
288	Omega Financial Investment & Insurance	Financial Planning/Insurance	Kirkland	<b>\$43</b>
289	Clear Wealth Management, LLC	Wealth Mgm't	Lynnwood/NY	\$43
290	Gallagher Capital Corp.	Wealth Mgm't	Bainbridge Island	\$42
291	Kamada Investment Management	Wealth Mgm't	Bellevue	<b>\$41</b>
292	Michael Pace, CFP	Wealth Mgm't	Seattle	<b>\$40</b>
293	Parker Financial, LLC	Wealth Mgm't	Silverdale	<b>\$39</b>
294	Heritage Benefits Investment Mgm't, LLC	Wealth Mgm't/Tax & Estate Svcs	Bellevue	<b>\$38</b>
295	Capital Investment Services, LLC/Vine Dahlen	Wealth Mgm't/Tax Services	Lynnwood	<b>\$37</b>
296	Fleckenstein Capital, Inc.	Hedge Fund Mgm't	Seattle	\$36
297	Limoges Investment Management, PC	Wealth Mgm't	Vancouver	\$36
298	Kelp Capital, LLC	Wealth Mgm't	Seattle	<b>\$36</b>
299	Lifefocus Financial Advisors, LLC	Wealth Mgm't/Tax Services	Walla Walla	<b>\$36</b>
300	PLM Investment Advisors, Inc.	Wealth Mgm't	Spokane	<b>\$36</b>
301	Northwest Financial Choices	Wealth Mgm't/Tax Planning	Renton	<b>\$36</b>
302	Brackenwood Capital Management	Wealth Mgm't	Bainbridge Island	<b>\$35</b>
303	Prevail Wealth Management, LLC	Wealth Mgm't	Kirkland	<b>\$33</b>
304	Meridian Wealth Management, LLC	Wealth Mgm't	Bellevue	\$33
305	Dightman Capital Group, Inc.	Wealth Mgm't	Seattle, Kansas	<b>\$33</b>

306	Sound Investment Strategies, Inc.	Wealth Mgm't	Mukilteo	\$32
307	SCS Systems, Inc.	Wealth Mgm't	East Sound	\$32
308	Adams Financial Concepts, LLC	Wealth Mgm't	Seattle	\$31
309	Asymmetric Advantage Capital Mgm't, LLC	Wealth Mgm't	Bellevue	\$31
310	Juetten Personal Financial Planning, LLC	Wealth Mgm't	Bellevue	\$31
311	Rainier Wealth Management, LLC	Wealth Mgm't	Mukilteo	\$30
312	MCM Advisory, LLC	Wealth Mgm't	Federal Way	\$30
313	Pacific Northwest Asset Management	Wealth Mgm't	Seattle	\$30
314	Vorpahl Wing Securities, Inc.	Wealth Mgm't	Spokane	\$30
315	Sound Sense Money Management, LLC	Wealth Mgm't	Bellevue	\$29
316	FIOH Global Asset Mgm't and Strategies, LLC	Wealth Mgm't	Seattle	\$29
317	Banner Investment Consultants	Wealth Mgm't	Anacortes	\$28
318	Point Defiance Capital Management, LLC	Wealth/Hedge Fund Mgm't	Tacoma	\$27
319	Catton Financial Services	Wealth Mgm't	Spokane	\$27
320	Martin Nelson & Co., Inc.	Wealth Mgm't	Seattle	\$26
321	Companion Portfolio Management, Inc.	Wealth Mgm't	Sequim	\$26
322	The Boyle Group Wealth Management	Wealth Mgm't	Seattle	\$26
323	Hancock Fielder Retirement Strategies, Inc.	Wealth Mgm't	Federal Way	\$26
324	Wealth-Builders, Inc.	Wealth Mgm't/Tax Services	Mercer Island	\$26
325	Firewall Capital Management	Wealth Mgm't	Enumclaw	\$26
326	Prism Capital Management, LLC	Wealth Mgm't	Seattle	\$24
327	Tacoma Investment Group	Wealth Mgm't	Tacoma	\$24
328	Fulcrum Wealth Advisors, LLC	Wealth Mgm't	Bellevue	\$23
329	Pacific Horizon Investment Management, LLC	Wealth Mgm't	Seattle	\$23
330	Pamria, LLC	Wealth Mgm't	Seattle	\$23
331	Latticework Capital	Wealth Mgm't/Hedge Fund	Sammamish	\$23
332	Fortis Capital Management LLC	Wealth Mgm't	Seattle	\$22
333	Stonebridge Capital Management NW, LLC	Wealth Mgm't	Gig Harbor	\$22
334	GK Capital Partners/A Street Investments	Wealth/Hedge Fund Mgm't	Olympia	\$22
335	Opal Advisors, LLC	Wealth Mgm't/Hedge Fund Mgm't	Bellevue	\$21
336	Timepiece Financial Planning, Inc.	Wealth Mgm't	Vancouver	\$21
337	BBM Financial Services, Inc.	Wealth Mgm't/Pension & Profit Sh.	Yakima	\$21
338	Long Term Investors, LLC	Wealth Mgm't	Wenatchee	\$21
339	Ludeman Capital Management, Inc.	Wealth Mgm't	Ferndale	\$20
340	Private Wealth Management Solutions, LLC	Wealth Mgm't	Bellevue	\$20
341	Thome Financial Mgm't, LLC	Wealth Mgm't	Bellevue	\$20
342	Polaris Asset Mgm't, LLC	Wealth Mgm't	Seattle	\$20
343	FSR Wealth Management	Wealth Mgm't	Bellingham	\$20
344	McBee Advisors, Inc.	Wealth Mgm't	Bellevue	\$20
345	Karel Capital, Inc.	Wealth Mgm't	Spokane	\$19
346	Janis Financial, LLC	Wealth Mgm't	Bainbridge Island	\$19
347	Nelson Financial Management, LLC	Wealth Mgm't	Bellevue	\$18
348	Interfund Management Services, Inc.	Wealth Mgm't	Roslyn	\$18
349	Commodore Asset Management, LLC	Wealth Mgm't	Tacoma	\$18
350	McRae Capital Mgm't, LLC	Wealth Mgm't	Edmonds/Everett/Multiple	\$18
351	American Northwest Advisory Svcs, LLC	Wealth Mgm't/Pension & Profit Sh.	Federal Way	\$17
352	Sitka Pacific Capital Management, LLC	Wealth Mgm't	Edmonds	\$16



353	Hana Road Capital, LLC	Wealth Mgm't/Hedge Fund	Seattle	\$15
354	Mellor & Associates, LLC	Wealth Mgm't	Bellevue	\$15
355	Pro Money Management, LLC	Wealth Mgm't	Walla Walla	\$15
356	CIM Financial Group, Inc.	Wealth Mgm't	Edmonds	\$15
357	Percension Wealth Advisors, LLC	Wealth Mgm't	Seattle	\$15
358	NWT Advisors, LLC	Wealth Mgm't/Tax Services	Bellevue	\$14
359	Northern Lights Advisors, Inc.	Wealth Mgm't	Seattle	\$14
360	Gunn Capital Management, LLC	Wealth Mgm't	Brewster	\$14
361	Howe Financial Advisory, LLC	Wealth Mgm't	Seattle	\$14
362	Waits Investments, LLC	Wealth Mgm't	Spokane	\$14
363	WealthCollab, LLC	Wealth Mgm't	Bellevue	\$14
364	The Advisor Benefits Group, Inc.	Financial Planning/Insurance	Kennewick	\$13
365	The Hydra Value Group, LLC	Wealth Mgm't	Kirkland	\$13
366	Kirchner Financial Services, Inc.	Wealth Mgm't	Spokane	\$13
367	Juniper Investment & Retirement Planning, LLC	Wealth Mgm't	Federal Way	\$13
368	K.L. Baird Asset Mgm't	Wealth Mgm't	Bothell	\$12
369	Viceroy Investment Advisors LLC	Wealth Mgm't	Mill Creek	\$12
370	Sound Financial Center	Wealth Mgm't	Sequim	\$12
371	Palindrome Capital Management, LLP	Wealth Mgm't	Spokane	\$12
372	Mavada Personal Wealth Management	Wealth Mgm't	Bellevue	\$11
373	South Beach Capital Management, LLC	Wealth Mgm't	Bainbridge Island	\$11
374	Stifel Financial Corp.	Broker Dealer, Investm't Advisor	Seattle/Blvu/Oly/Wenatch.	\$10
375	Securian Advisors NW(Securian Fin Svcs Inc)	Financial Planning/Insurance	Bellevue	\$10
376	Cetera Advisors, LLC	Broker Dealer, Investm't Advisor	Multiple Offices	\$10
377	Tenere, LLC	Wealth Mgm't	Issaquah	\$10
378	Decker Retirement Planning, Inc.	Wealth Mgm't	Kirkland/Seattle/UT	\$10
379	WaterHill Capital, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$10
380	Clearbrook Investment Management	Wealth Mgm't	Bellingham	\$10
381	Wright Wealth Management, LLC	Wealth Mgm't	Issaquah	\$10
382	Coast Capital Management, LLC	Wealth Mgm't/Pension & Profit Sh.	Bainbridge Island	\$9
383	BR Capital, Inc.	Wealth Mgm't	Vancouver	\$9
384	Bayley Financial, Inc.	Wealth Mgm't	Seattle	\$9
385	Ariston Capital Mgm't Corp.	Money Mgm't/Mutual Fund Spec.	Bellevue	\$9
386	Reppond Investments, Inc.	Wealth Mgm't	Bellevue	\$9
387	Pegasus Investment Mgm't, LLC	Wealth/Hedge Fund Mgm't	Bainbridge Island	\$8
388	Investment Hiker, LLC	Wealth/Hedge Fund Mgm't	Vancouver	\$8
389	Wilkison Investment Services, LLC	Wealth Mgm't	Snoqualmie	\$8
390	Northwest Investment Advisors, Inc.	Broker Dealer, Investm't Advisor	Spokane	\$8
391	Lin Capital Management, LLC	Wealth/Hedge Fund Mgm't	Issaquah	\$8
392	Directional Financial Services, LLC	Wealth Mgm't	Seattle	\$7
393	Morris Asset Management	Wealth Mgm't	Bellevue	\$7
394	Signal Financial Planning, LLC	Wealth Mgm't	Issaquah	\$7
395	Steward Capital, LLC	Wealth Mgm't	Bellevue	\$6
396	Westface Financial Advisory	Wealth Mgm't	Vancouver	\$6
397	Tracker Research, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$5
398	Voya Financial Advisors	Wealth Mgm't	Bellevue	\$5
399	Capital Management Resources, LLC	Wealth Mgm't	Port Orchard	\$4

400	Chernofsky Financial, LLC	Wealth Mgm't	Vancouver	\$4
401	Seattle Asset Mgm't, Inc.	Wealth Mgm't	Bainbridge Island	\$4
402	Hernandez Financial	Wealth Mgm't	Sunnyside	\$4
403	Vail Ridge Capital, LLC	Wealth Mgm't	Bellingham	\$4
404	Cedar River Capital, LLC	Wealth Mgm't	Seattle	\$4
405	Core Capital Advisors, LLC	Wealth Mgm't	Olympia	\$3
406	Strategic Asset Management	Wealth Mgm't	Tacoma	\$3
407	Childress Investment Mgm't	Wealth Mgm't	Bellevue	\$3
408	R. W. Mak Investments	Wealth Mgm't	Bellevue	\$3
409	Creative Retirement Planning, Inc.	Wealth Mgm't	Sq'm/Sivrld/Cpev'l/Shorel'n	\$3
410	Abraham & Co., Inc.	Wealth Mgm't	Gig Harbor	\$2
411	Pi Square Capital, LLC	Wealth Mgm't	Bellevue	\$2
412	Portfolio Advisors Group, Inc.	Wealth Mgm't	Gig Harbor	\$2
413	Trail Financial Planning, LLC	Wealth Mgm't	Bellingham	\$2
414	NUKU Asset Management, Inc.	Wealth Mgm't	Bainbridge Island	\$2
415	Seagrass Advisors, LLC	Wealth Mgm't	Bellevue	\$2
416	Moe Investment Management, LLC	Wealth Mgm't	Spokane	\$2
417	Summit Family Office Services, LLC	Wealth Mgm't	Bellevue	\$2
418	Salmon Bay Wealth Management, LLC	Wealth Mgm't	Seattle	\$1
419	Unleashed Financial, LLC	Wealth Mgm't	Kirkland	\$1
420	Janice Penar	Wealth Mgm't/Tax Services	Spokane	\$1
421	Sun Asset Management, Inc.	Wealth Mgm't	Bellevue	\$1
422	Comus Invetment, LLC	Wealth Mgm't	Olympia	\$1

Last edited on: 01/22/19 at 7:00 pm

Total AUM = \$940,943,000,000