



RAH FINANCIAL

FINANCIAL STAFFING SOLUTIONS

2020 Washington State Money Managers Ranking List (by AUM)

Total AUM: \$1,065,814,000,000 (updated 3/31/21)

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

Web Site: www.RAHfinancial.com

Assets are in millions and are as of January 11, 2021

Rank	Manager	Manager Type	City	Assets
1	Parametric Portfolio Associates	Money Mgm't/Mutual Fund Spec.	Seattle	\$355,000
2	Russell Investment Group	Money Management	Seattle	\$297,500
3	Fisher Investments	Wealth Mgm't	Camas	\$120,950
4	Milliman, Inc.	Wealth Mgm't/Pension Consultants	Seattle/Multiple Offices	\$45,362
5	Edge Asset Mgm't Inc./Princ. Globe Investors	Money Mgm't/Mutual Fund Mgrs.	Seattle	\$14,800
6	Financial Advocates Investment Mgm't	Wealth Mgm't/Broker-Dealer/RIA	Olympia, Portland	\$11,012
7	Wells Fargo Wealth Management Group	Wealth/Trust Mgm't	Seattle/Tacoma/Bellevue	\$9,408
8	Pugh Capital Mgm't, Inc.	Institutional Fixed Inc. Money Mgr	Seattle	\$8,875
9	Washington Capital Mgm't, Inc.	Wealth Mgm't	Seattle/OR/CA/MA	\$7,247
10	Silver Creek Capital Mgm't, LLC	Hedge Fund Mgm't	Seattle	\$6,988
11	Brighton Jones, LLC	Wealth Mgm't	Seattle/SF/AZ/DC/OR	\$6,800
12	Verus Advisory, Inc.(prev. Wurts & Assoc.)	Wealth Mgm't/Pension & Profit Sh.	Seattle/L.A./S.F.	\$5,684
13	Freestone Capital Mgm't, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$5,402
14	U.S. Trust/Bank of America	Wealth/Trust Mgm't	Seattle/Multi-state Offices	\$5,250
15	Invesco Managed Accounts, LLC	Fixed Inc Asset Manager	Seattle/Portland/S.F.	\$5,134
16	Laird Norton W'lth Mgm't(Strat./Trust Co, LLC)	Wealth Mgm't/Trust Mgm't	Seattle	\$5,100
17	US Bank Private Client Group	Wealth/Trust Mgm't	Prtlnd/Seattle/Cour de L'ne	\$5,100
18	Saturna Capital Corporation	Money Mgm't/Mut'l Fnd Spec/B-Dir	Bellingham	\$5,100
19	Pathstone (Prev. Cornerstone Advisors, Inc.)	Wealth Mgm't/Family Office Svcs.	Blvue/Seattle/Anchorage	\$4,500
20	Columbia Pacific Wealth Management	Wealth Mgm't	Seattle	\$4,470
21	D.A. Davidson & Co.	Broker Dir/Wealth Mgm't/Trust	WA/MT/NE/CA	\$4,400
22	Coldstream Wealth Management	Wealth Mgm't	Bellevue/Seattle	\$4,140
23	Pacific Portfolio Consulting, LLC	Wealth Mgm't	Seattle	\$3,766

24	Baird Investment Group/Robert W. Baird & Co.	Broker Dealer, Investm't Advisor	Seattle/Yakima/Mt. Vernon	\$3,553
25	Northern Trust Bank	Wealth/Trust Mgm't	Seattle	\$3,400
26	Tiedemann Advisors, LLC	Wealth Mgm't/Family Office Svcs.	Seattle/NY/Multi-state	\$3,347
27	Kunath Karren Rinne & Atkin, LLC	Wealth Mgm't	Seattle	\$3,240
28	Oppenheimer & Co., Inc.	Wealth Mgm't	Seattle/Multi-Office	\$3,235
29	Badgley Phelps Wealth Managers	Wealth Mgm't	Seattle	\$3,196
30	McCutchen Group, LLC	Wealth Mgm't	Seattle	\$3,006
31	Evergreen Gavekal	Wealth Mgm't	Bellevue	\$2,950
32	Moss Adams Wealth Advisors	Wealth Mgm't	Seattle/Everett/Tac/Yakima	\$2,804
33	Taiyo Pacific Partners L.P.	Hedge Fund Mgm't	Kirkland	\$2,800
34	Zevenbergen Capital Investments LLC	Wealth Mgm't	Seattle	\$2,737
35	Merriman Wealth Management, LLC	Wealth Mgm't	Seattle/Spokane/Eugene	\$2,715
36	Empirical Wealth Mgm't, LLC	Wealth Mgm't	Seat/Blvu/Spok'n/AK/CA/OR	\$2,664
37	Northwest Asset Management	Wealth Mgm't	Mercer Island	\$2,532
38	The Pacific Financial Group	Wealth Mgm't	Bellevue	\$2,336
39	Key Private Bank	Wealth/Trust Mgm't	Seattle/Tac/Blvue/Belghm	\$2,226
40	WestRiver Management, LLC	Wealth/Hedge Fund Mgm't	Kirkland	\$2,112
41	The Clarius Group, LLC	Wealth Mgm't	Bellevue	\$2,039
42	Steelhead Partners, LLC	Hedge Fund Mgm't	Seattle	\$1,975
43	Columbia Pacific Advisors, LLC	Hedge Fund Mgm't	Seattle	\$1,912
44	Barwick & Partners, Inc.	Wealth Mgm't	Seattle	\$1,861
45	The Caprock Group, Inc.	Wealth Mgm't	Mercer Island/Idaho/Calif.	\$1,800
46	D'Annunzio Consulting Group, LLC	Wealth Mgm't	Tacoma	\$1,609
47	Strategic Income Management, LLC	Money Mgm't/Mutual Fund Mgrs.	Seattle	\$1,404
48	Paracle Advisors, LLC	Wealth Mgm't	Mercer Island	\$1,400
49	Bristlecone Advisors, LLC	Wealth Mgm't	Seattle	\$1,334
50	Garde Capital, Inc.	Wealth Mgm't	Seattle	\$1,275
51	Union Bank	Wealth/Trust Mgm't	Portland/Seattle/Tacoma	\$1,050
52	Greene Wealth Management, LLC	Wealth Mgm't	Seattle	\$1,030
53	Citi Private Bank	Wealth Mgm't	Seattle	\$1,000
54	Kosmos Management, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$992
55	Benchmark Plus Management, LLC	Wealth/Hedge Fund Mgm't	Tacoma/New Jersey	\$942
56	Tradewinds Capital Management, LLC	Wealth Mgm't	Bellingham/Shoreline	\$921
57	SEI Huntington Steele, LLC	Wealth Mgm't	Seattle/Multi-state Offices	\$848
58	Acuitas Investments, LLC	Money Management/Mutual Funds	Seattle	\$845
59	Ten Capital Investment Advisors, LLC	Wealth Mgm't	Spokane	\$845
60	Petersen Hastings Investment Mgm't, Inc.	Wealth Mgm't	Kennewick	\$830
61	Kiley Juergens Wealth Management, LLC	Wealth Mgm't	Olympia	\$827
62	Highland Private Wealth Mgm't	Wealth Mgm't	Bellevue	\$817
63	Soundmark Wealth Management, LLC	Wealth Mgm't	Kirkland	\$805
64	Trutina Financial	Wealth Mgm't	Bellevue	\$791
65	Financial Plan, Inc.	Wealth Mgm't	Bellingham	\$731
66	Auxano Advisors, LLC	Wealth Mgm't	Kirkland	\$710
67	Fulcrum Capital, LLC	Wealth Mgm't	Seattle	\$701
68	First Pacific Financial, Inc.	Wealth Mgm't	Vancouver	\$683
69	Viridian RIA, LLC	Wealth Mgm't	Seattle	\$678
70	Cutler Investment Counsel, LLC	Wealth Mgm't/Mutual Funds	Seattle/OR/VA	\$671

71	Hightower Advisors, LLC (prev. Triad Wealth)	Wealth Mgm't	Bellevue	\$651
72	Oak Harbor	Wealth/Hedge Fund Mgm't	Seattle	\$606
73	Newfocus Financial Group, LLC	Wealth Mgm't	Vancouver/Portland/S.F.	\$603
74	Elite Wealth Management, Inc./Lattice Capital	Wealth Mgm't/Hedge Fund Mgm't	Kirkland	\$595
75	Lucid Advisors, Inc.	Wealth Mgm't	Seattle	\$574
76	Blackcrane Capital	Wealth/Hedge Fund Mgm't	Bellevue	\$564
77	Private Income Capital Management	Wealth Mgm't	Seattle	\$553
78	Mountain Pacific Advisors, LLC	Hedge Fund/Pens./Profit-Sharing	Bellevue	\$551
79	FRG Family Wealth Advisors	Wealth Mgm't	Bellevue/AZ/CA/TX	\$550
80	Vestory, LLC	Wealth Mgm't	Blvue,Lakew'd,Scottsdale	\$537
81	Strategic Wealth Mgm't, Inc.	Wealth Mgm't/Native Amer. Tribes	Kirkland	\$528
82	Leonard Rickey Investment Advisors, PLLC	Wealth Mgm't	Yakima	\$511
83	Mercer Global Advisors, Inc.	Wealth Mgm't	Bellevue/Multi-state	\$500
84	McIlrath and Eck, LLC	Wealth Mgm't	Arlington	\$494
85	Raymond James Financial Services, Inc.	Broker Dealer, Investm't Advisor	Multiple OfficesMill Creek	\$490
86	EP Wealth Advisors, LLC(Conlon & Dart, LLC)	Wealth Mgm't	Seattle/CA/CO	\$485
87	James R. Martin Consulting, Inc.	Wealth Mgm't/Consulting Svcs.	Vancouver	\$461
88	Duncan & Haley, LTD	Wealth Mgm't	Seattle	\$458
89	Avier Wealth Advisors	Wealth Mgm't	Bellevue/Lake Oswego,OR	\$454
90	Northwest Administrators, Inc.	Pension/Trust Administration	Seattle	\$442
91	Capital Planning, LLC	Wealth Mgm't	Bellevue	\$435
92	CWH Capital Mgm't, Inc.(dba Hart Capital Mgm't)	Wealth Mgm't	Spokane/Idaho	\$434
93	Financial Insights, Inc.	Wealth Mgm't	Tacoma	\$426
94	Schmidt Financial Group, Inc.	Wealth Mgm't	Kirkland/Mtn View, CA	\$414
95	Northwest Investment Consulting, Inc.	Wealth Mgm't	Seattle	\$404
96	Talbot Financial, LLC	Wealth Mgm't	Bellevue	\$402
97	Private Ocean Wealth Management	Wealth Mgm't	Seattle/CA	\$400
98	Quantum Financial Planning Services, Inc.	Wealth Mgm't	Spokane	\$387
99	Kutscher Benner Barsness & Stevens, Inc.	Wealth Mgm't	Seattle	\$386
100	Trellis Advisors, LLC	Wealth Mgm't	Seattle/Ellensburg	\$386
101	Personal Investment Mgm't, Inc.	Wealth Mgm't	Redmond	\$382
102	Private Advisory Group	Wealth Mgm't	Redmond	\$368
103	Columbia River Advisors, LLC	Wealth Mgm't	Tacoma	\$365
104	HBC Financial Services, PLLC	Wealth Mgm't/Tax Services	Seattle	\$364
105	Conway Jarvis & Associates, LLC	Wealth Mgm't	Seattle	\$355
106	Marshall & Sullivan, Inc.	Wealth Mgm't	Seattle	\$349
107	Harbour Investment Mgm't, LLC	Wealth Mgm't	Edmonds	\$345
108	Robinswood Financial, LLC	Wealth Mgm't	Kirkland	\$336
109	Archon Capital Mgm't, LLC	Hedge Fund Mgm't	Seattle	\$330
110	Northern Capital Management, Inc.	Wealth Mgm't	Spokane	\$328
111	Palouse Capital Mgm't, Inc. (prev.Ken Roberts)	Wealth Mgm't	Spokane	\$315
112	Umpqua Investments, Inc.	Wealth/Trust Mgm't	OR/CA/WA	\$313
113	Highbury Pacific Capital Corp.	Wealth Mgm't	Seattle	\$308
114	Pacific Current Group	Hedge Fund Mgm't	Seattle/Tacoma	\$303
115	Canterbury Consulting, Inc.	Wealth Mgm't	Seattle/CA	\$300
116	Fiduciary Counselling, Inc.	Wealth Mgm't	Tacoma	\$300
117	Conover Capital Management, LLC	Wealth Mgm't	Bellevue	\$293

118	Integrity Financial Corp.	Wealth Mgm't/Consulting Svcs.	Bellevue/CA/FLA/OR	\$293
119	Sonata Capital Group, Inc.	Wealth Mgm't	Seattle	\$290
120	Soundview Advisors	Wealth Mgm't	Seattle/Olympia	\$288
121	Chaney Capital Mgm't	Wealth Mgm't	Lynnwood	\$282
122	Sovereign Wealth Advisors, Inc.	Wealth Mgm't	Bellevue	\$280
123	ASI Wealth Management	Wealth Mgm't	Seattle & 3 Oregon Offices	\$278
124	Synergy Financial Mgm't, LLC	Wealth Mgm't	Bellevue	\$273
125	EQ Wealth Management	Wealth Mgm't	Mercer Island	\$273
126	Lakeside Advisors, Inc.	Wealth Mgm't	Seattle	\$270
127	Bellevue Asset Mgm't, LLC	Wealth Mgm't	Bellevue	\$262
128	Harlow Wealth Management, Inc.	Tax Services	Vancouver	\$255
129	Great Northern Asset Management, LLC	Wealth Mgm't	Vancouver	\$244
130	Oliver Capital Mgm't, Inc.	Wealth Mgm't	Seattle	\$243
131	Comprehensive Wealth Mgm't	Wealth Mgm't	Lynnwood	\$242
132	Snider Financial Group	Wealth Mgm't	Bellevue	\$235
133	S.R. Schill & Assoc., Inc.	Wealth Mgm't	Mercer Island	\$233
134	Ramsey & Associates, Inc.	Wealth Mgm't	Seattle	\$225
135	BAC Capital Advisors, LLC	Wealth Mgm't/Pension & Profit Sh.	Seattle	\$223
136	Bogdanovich Wealth Management, PLLC	Wealth Mgm't	Edmonds	\$220
137	Hamrick Investment Counsel, LLC	Wealth Mgm't	Seattle	\$220
138	Garland Capital Mgm't, Inc.	Wealth Mgm't	Bellevue	\$217
139	Elliott Cove Cap. Mgm't	Wealth Mgm't	Seattle	\$215
140	Skyline Advisors, Inc.	Wealth Mgm't	Bellingham	\$215
141	Etesian Wealth Advisors, Inc.	Wealth Mgm't	Spokane/Portland	\$214
142	Lincoln Invstment Plng (IA's Tremper & Roper)	Wealth Mgm't	Renton	\$212
143	Madison Park Capital Advisors, LLC	Wealth Mgm't	Seattle	\$210
144	Sander Capital Advisors	Wealth Mgm't	Seattle	\$210
145	Miller Advisors, Inc.	Wealth Mgm't	Kirkland	\$204
146	Smart Portfolios, LLC	Wealth Mgm't	Lake Forest Park	\$203
147	The Retirement Solution, Inc.	Wealth Mgm't	Redmond	\$197
148	Pacific Asset Mgm't, LLC	Wealth Mgm't	Pt Orchard/Gig Hbr/Shelton	\$190
149	Seneschal Advisors, LLC	Wealth Mgm't	Tacoma	\$190
150	Boone Wealth Advisors, LLC	Wealth Mgm't	Bellevue	\$187
151	Breakwater Investment Management	Wealth Mgm't	Seattle	\$185
152	Bear Mountain Capital	Private Fund Mgm't	Seattle	\$184
153	Richards, Merrill & Peterson, Inc.	Wealth Mgm't	Spokane	\$184
154	Lesa Sroufe & Company, Inc.	Wealth Mgm't	Seattle	\$183
155	Demars Financial Group	Wealth Mgm't	Spokane./Kenai, AK	\$182
156	Madrona Financial Services, LLC	Wealth Mgm't	Everett/Blvue/Seattle	\$176
157	Evans Capital Mgm't Associates	Wealth Mgm't/Insurance	Seattle/Bellevue	\$170
158	Christensen, King & Assoc. Investment Svcs.	Wealth Mgm't	Richland	\$169
159	Runde & Co., LLC	Wealth Mgm't	Seattle	\$165
160	Wealth Asset Managers/Nelson Securities	Wealth Mgm't	Spokane	\$160
161	Jarvis Financial Services, Inc.	Wealth Mgm't	Federal Way	\$158
162	Agate Pass Investment, LLC	Wealth Mgm't	Bainbridge Island	\$156
163	ICM Asset Mgm't, Inc.	Wealth/Hedge Fund Mgm't	Spokane	\$156
164	Investor's Fiduciary Advisor Network, LLC	Wealth Mgm't	Snoqualmie	\$153

165	Moser Wealth Advisors, LLC	Wealth Mgm't/Tax Services	Bellevue	\$151
166	Tieton Capital Management, LLC	Money Manager, Small Cap. Val.	Yakima	\$150
167	Kaizen Financial Advisors, LLC	Wealth Mgm't	Kirkland	\$146
168	Aviso Wealth Management	Wealth Mgm't	Seattle/PA/ME/MD	\$143
169	Columbia Advisory Partners, LLC	Wealth Mgm't	Spokane	\$143
170	Fortis Capital Management LLC	Wealth Mgm't	Seattle	\$141
171	Fortitude Advisory Group, LLC	Wealth Mgm't	Gig Harbor	\$138
172	Olson Investment Advisors, LLC	Wealth Mgm't	Seattle	\$134
173	TrueNorth Wealth Advisors	Wealth Mgm't	Seattle	\$132
174	Stolz & Associates, PS	Wealth Mgm't	Tacoma	\$130
175	Helmsman Financial Group, LLC	Wealth Mgm't, Tax/Fin. Services	Woodinville	\$129
176	Kaufman Kampe Advisors, LLC	Wealth Mgm't	Mercer Island	\$128
177	BHJ Wealth Advisors	Wealth Mgm't	Gig Harbor	\$127
178	Private Asset Mgm't	Wealth Mgm't	Kirkland	\$127
179	Halbert Hargrove	Wealth Mgm't	Bellevue/Multi-state	\$125
180	Murphy Investment Management, LLC	Wealth Mgm't	Spokane	\$125
181	Portfolio Strategies, Inc.	Wealth Mgm't	Tacoma	\$125
182	Dental Wealth Advisors, LLC	Wealth Mgm't	Kirkland	\$122
183	Waycross Investment Mgm't Company	Wealth Mgm't	Bellingham	\$122
184	Asset Planning & Management, Inc.	Wealth Mgm't	Spokane	\$117
185	Fort Vancouver Investment Management, LLC	Wealth Mgm't	Vancouver/Portland	\$117
186	Leeward Financial Partners, LLC	Wealth Mgm't	Seattle	\$117
187	McBride Financial Advisors, LLC	Wealth Mgm't	Seattle	\$117
188	Leeward Financial Partners, LLC	Wealth Mgm't	Seattle	\$117
189	The Planner's Edge, LLC	Wealth Mgm't	Mercer Island	\$115
190	John T. McCarthy, LLC	Wealth Mgm't	Spokane	\$114
191	Sapphire Star Capital, LLC	Wealth/Hedge Fund Mgm't	Kirkland	\$114
192	Viewpoint Capital Management, LLC	Wealth Mgm't	Seattle	\$114
193	Helm Capital Management, LLC	Wealth Mgm't/Hedge Fund	Seattle	\$112
194	Aspire Capital Advisors, LLC	Wealth Mgm't	Seattle	\$111
195	BBJS Financial Advisors, LLC	Wealth Mgm't	Seattle	\$107
196	Newground Social Investment	Wealth Mgm't	Seattle	\$107
197	Olympic Wealth Management, LLC	Wealth Mgm't	Bothell	\$106
198	Optimist Retirement, LLC	Wealth Mgm't	Bellevue/Scottsdale AZ	\$103
199	Nierenberg Investment Management Company, Inc	Wealth/Hedge Fund Mgm't	Camas	\$102
200	Johnson & Shute Investment Advisors, Inc.	Wealth Mgm't/Tax Services	Bellevue	\$101
201	Turloff Financial Consulting, Inc.	Wealth Mgm't	Bainbridge Island	\$99
202	Buckley Investment Group, LLC	Wealth Mgm't	Walla Walla	\$98
203	TFS Advisors, LLC	Wealth Mgm't	Edmonds	\$98
204	Gregory Lyle & Company	Wealth Mgm't	Clinton	\$97
205	Warga Asset Mgm't	Wealth Mgm't	Kirkland	\$97
206	Eagle Harbor Asset Mgm't	Wealth Mgm't	Seattle	\$93
207	Hot Creek Capital, LLC	Wealth Mgm't	Seattle	\$93
208	Cadence Wealth Management	Wealth Mgm't	Seattle	\$89
209	Investors Portfolio Services, LLC	Wealth Mgm't	Puyallup	\$86
210	Stock Mgm't, LLC	Wealth Mgm't	Puyallup	\$86
211	Griffiths, Dreher & Evans, PS, CPAs	Wealth Mgm't/Tax Services	Spokane	\$84

212	Sound Financial Planning, Inc.	Wealth Mgm't	Mt. Vernon	\$84
213	Byrne & Company Wealth Management	Wealth Mgm't	Olympia	\$82
214	Goldbloom Wealth Management, LLC	Wealth Mgm't	Bellevue	\$82
215	Fairview Partners Investment Mgm't, LLC	Hedge Fund Mgm't	Seattle	\$80
216	Adams Financial Concepts, LLC	Wealth Mgm't	Seattle	\$80
217	Bellingham Capital	Wealth Mgm't	Bellingham/Anacortes	\$79
218	Wilhelm Financial Services, PLLC	Wealth Mgm't	Olympia	\$79
219	Stapp Wealth Management, PLLC	Wealth Mgm't/Tax Services	Olympia	\$78
220	Alliant Securities, Inc.	Wealth Mgm't	Liberty Lake/Spokane	\$77
221	Allison Spielman Advisors/Allison Miller, LLC	Wealth Mgm't	Bellevue	\$77
222	Prevail Wealth Management, LLC	Wealth Mgm't	Kirkland	\$77
223	Wealthmark, LLC	Wealth Mgm't	Bellingham	\$77
224	White & Company Financial Planning, Inc.	Wealth Mgm't	Sunnyside	\$76
225	Karel Capital, Inc.	Wealth Mgm't	Spokane	\$75
226	Seattle Portfolio Company	Wealth Mgm't	Seattle	\$75
227	Informed Investors Group	Wealth Mgm't/Socially Resp. Inv.	Seattle	\$74
228	Integrity Wealth Management, Inc.	Wealth Mgm't	Spokane	\$74
229	Middleton & Company	Wealth Mgm't	Vancouver	\$74
230	Selkirk Wealth Advisors, LLC	Wealth Mgm't	Spokane	\$73
231	Helium Advisors, LLC	Wealth Mgm't	Bellevue	\$72
232	NR Smith & Associates, P.S.	Wealth Mgm't/Tax Services	Olympia	\$72
233	Brackenwood Capital Management	Wealth Mgm't	Bainbridge Island	\$70
234	Kairos Capital Management, LLC	Wealth Mgm't	Bellevue	\$69
235	Mangan Wealth Management	Wealth Mgm't	Seattle	\$68
236	Hawkins Investment Counsel, LLC	Wealth Mgm't	Port Orchard	\$67
237	Parker Financial, LLC	Wealth Mgm't	Silverdale	\$67
238	Peterson Investment Mgm't, Inc.	Wealth Mgm't	Spokane	\$67
239	Flohr Asset Management, LLC	Wealth Mgm't/Hedge Fund	Bellevue	\$66
240	Financial Research, Inc.	Wealth Mgm't	Issaquah	\$65
241	Paysse Jennison, Inc.	Wealth Mgm't	Mercer Island	\$62
242	Prentice Financial Planning, LLC	Wealth Mgm't	Olympia	\$61
243	Monson Wealth Management, Inc.	Wealth Mgm't	Kennewick	\$60
244	Professional Investment Management Services, PI	Wealth Mgm't	Kennewick	\$60
245	Sherwood Investment Services	Wealth Mgm't	Redmond	\$60
246	Simple Wealth, LLC	Wealth Mgm't	Spokane	\$60
247	Martin Nelson & Co., Inc.	Wealth Mgm't	Seattle	\$59
248	Moore Wealth Management, LLC	Wealth Mgm't	Renton	\$59
249	Clear Wealth Management, LLC	Wealth Mgm't	Lynnwood/NY	\$58
250	Pacific Crest Financial Advisors, LLC	Wealth Mgm't/Inv. Advisors	Everett/Seattle	\$58
251	Signia Capital Management, LLC	Institutional Money Mgm't/Value	Spokane	\$57
252	Fleckenstein Capital, Inc.	Hedge Fund Mgm't	Seattle	\$56
253	Mercer Asset Mgm't, Inc.	Wealth Mgm't	Bainbridge Island	\$56
254	Pengra Capital Mgm't, Inc.	Wealth Mgm't/Hedge Fund	Seattle	\$56
255	R. Brian Howell & Associates, Inc.	Wealth Mgm't	Tacoma	\$55
256	Omega Financial Investment & Insurance	Financial Planning/Insurance	Kirkland	\$54
257	Sabin Investment Management, Inc.	Wealth Mgm't	Gig Harbor	\$54
258	Evergreen Wealth Management Services, Inc.	Wealth Mgm't	Port Ludlow	\$52

259	Renaissance Wealth Counsel, LLC	Wealth Mgm't/Tax Services	Bellevue	\$52
260	Stewardship Concepts Financial Services, LLC	Wealth Mgm't	Spokane	\$52
261	Dightman Capital Group, Inc.	Wealth Mgm't	Seattle, Kansas	\$52
262	Capital Investment Services, LLC	Wealth Mgm't/Tax Services	Lynnwood	\$50
263	Bordeaux Wealth Advisors	Wealth Mgm't	Bellevue	\$50
264	Hancock Fielder Retirement Strategies, Inc.	Wealth Mgm't	Federal Way	\$49
265	Therese Govern Financial Advisors, LLC	Wealth Mgm't	Seattle	\$49
266	Investor Resources, Inc.	Wealth Mgm't	Bellevue/Port Orchard	\$48
267	Pacific Northwest Asset Management	Wealth Mgm't	Seattle	\$48
268	Ragnar Wealth Management, LLC	Wealth Mgm't	Tumwater/Bellingham	\$46
269	Meridian Wealth Management, LLC	Wealth Mgm't	Bellevue	\$45
270	Michael Pace, CFP	Wealth Mgm't	Seattle	\$45
271	Kelp Capital, LLC	Wealth Mgm't	Seattle	\$43
272	Northwest Financial Choices	Wealth Mgm't/Tax Planning	Renton	\$43
273	PLM Investment Advisers, Inc.	Wealth Mgm't	Spokane	\$42
274	Gallagher Capital Corp.	Wealth Mgm't	Bainbridge Island	\$41
275	SCS Systems, Inc.	Wealth Mgm't	East Sound	\$41
276	Commencement Financial Planning, LLC	Wealth Mgm't	Tacoma	\$40
277	WealthCollab, LLC	Wealth Mgm't	Bellevue	\$40
278	Lifefocus Financial Advisors, LLC	Wealth Mgm't/Tax Services	Walla Walla	\$39
279	Rainier Wealth Management, LLC	Wealth Mgm't	Mukilteo	\$38
280	Asymmetric Advantage Capital Mgm't, LLC	Wealth Mgm't	Bellevue	\$36
281	FIOH Global Asset Mgm't and Strategies, LLC	Wealth Mgm't	Seattle	\$36
282	Sound Investment Strategies, Inc.	Wealth Mgm't	Bothell	\$35
283	Firewall Capital Management	Wealth Mgm't	Enumclaw	\$34
284	MCM Advisory, LLC	Wealth Mgm't	Federal Way	\$34
285	Wealth-Builders, Inc.	Wealth Mgm't/Tax Services	Mercer Island	\$34
286	Journey Financial Services	Wealth Mgm't	Edmonds	\$34
287	Point Defiance Capital Management, LLC	Wealth/Hedge Fund Mgm't	Tacoma	\$32
288	Tacoma Investment Group	Wealth Mgm't	Tacoma	\$31
289	The Boyle Group Wealth Management	Wealth Mgm't	Seattle	\$31
290	Timepiece Financial Planning, Inc.	Wealth Mgm't	Vancouver	\$31
291	Fulcrum Wealth Advisors, LLC	Wealth Mgm't	Bellevue	\$30
292	Northern Lights Advisors, Inc.	Wealth Mgm't	Seattle	\$30
293	Pacific Horizon Investment Management, LLC	Wealth Mgm't	Seattle	\$30
294	Companion Portfolio Management, Inc.	Wealth Mgm't	Sequim	\$29
295	Flow Financial Planning, LLC	Wealth Mgm't	Bellingham	\$29
296	Flow Financial Planning, LLC	Wealth Mgm't	Bellingham	\$29
297	BBM Financial Services, Inc.	Wealth Mgm't/Pension & Profit Sh.	Yakima	\$28
298	Stonebridge Capital Management NW, LLC	Wealth Mgm't	Gig Harbor	\$28
299	Abraham & Co., Inc.	Wealth Mgm't	Gig Harbor	\$26
300	Catton Financial Services	Wealth Mgm't	Spokane	\$26
301	GK Capital Partners	Wealth/Hedge Fund Mgm't	Olympia	\$25
302	Opal Advisors, LLC	Wealth Mgm't/Hedge Fund Mgm't	Bellevue	\$25
303	Polaris Asset Mgm't, LLC	Wealth Mgm't	Seattle	\$25
304	Thome Financial Mgm't, LLC	Wealth Mgm't	Bellevue	\$25
305	Julie A. Wurst, CFP, LLC	Wealth Mgm't	Tacoma	\$25

306	Prism Capital Management, LLC	Wealth Mgm't	Seattle	\$24
307	FSR Wealth Management	Wealth Mgm't	Bellingham	\$23
308	Long Term Investors, LLC	Wealth Mgm't	Wenatchee	\$23
309	Private Wealth Management Solutions, LLC	Wealth Mgm't	Bellevue	\$23
310	Vorpahl Wing Securities, Inc.	Wealth Mgm't	Spokane	\$22
311	Kamada Investment Management	Wealth Mgm't	Bellevue	\$21
312	Commodore Asset Management, LLC	Wealth Mgm't	Tacoma	\$20
313	McBee Advisors, Inc.	Wealth Mgm't	Bellevue, Glendale AZ	\$20
314	Sound Financial Center	Wealth Mgm't	Sequim	\$20
315	Ironstream Capital, LLC	Wealth Mgm't	Seattle	\$19
316	Latticework Capital	Wealth Mgm't/Hedge Fund	Sammamish	\$19
317	Mellor & Associates, LLC	Wealth Mgm't	Bellevue	\$19
318	Meridan Capital, LLC	Wealth/Hedge Fund Mgm't	Bellevue	\$18
319	Nelson Financial Management, LLC	Wealth Mgm't	Kirkland	\$18
320	Wright Wealth Management, LLC	Wealth Mgm't	Issaquah	\$18
321	Interfund Management Services, Inc.	Wealth Mgm't	Roslyn	\$17
322	Ludeman Capital Management, Inc.	Wealth Mgm't	Ferndale	\$17
323	NWT Advisors, LLC	Wealth Mgm't/Tax Services	Duvall	\$17
324	Gunn Capital Management, LLC	Wealth Mgm't	Pateros	\$16
325	Janis Financial, LLC	Wealth Mgm't	Bainbridge Island	\$16
326	Waits Investments, LLC	Wealth Mgm't	Spokane	\$16
327	Pro Money Management, LLC	Wealth Mgm't	Walla Walla	\$15
328	The Advisor Benefits Group, Inc.	Financial Planning/Insurance	Kennewick	\$15
329	Viceroy Investment Advisors LLC	Wealth Mgm't	Mill Creek	\$15
330	Westface Financial Advisory	Wealth Mgm't	Vancouver	\$15
331	Cedar River Capital, LLC	Wealth Mgm't	Seattle	\$14
332	Percension Wealth Advisors, LLC	Wealth Mgm't	Seattle	\$14
333	American Northwest Advisory Svcs, LLC	Wealth Mgm't/Pension & Profit Sh.	Federal Way	\$13
334	WaterHill Capital, LLC	Wealth/Hedge Fund Mgm't	Kenmore	\$13
335	CIM Financial Group, Inc.	Wealth Mgm't	Lynnwood	\$12
336	K.L. Baird Asset Mgm't	Wealth Mgm't	Bothell	\$12
337	Northwest Investment Advisors, Inc.	Broker Dealer, Investm't Advisor	Spokane	\$12
338	Howe Financial Advisory, LLC	Wealth Mgm't	Seattle	\$11
339	Seattle Asset Mgm't, Inc.	Wealth Mgm't	Bainbridge Island	\$11
340	Trail Financial Planning, LLC	Wealth Mgm't	Bellingham	\$11
341	Ariston Capital Mgm't Corp.	Money Mgm't/Mutual Fund Spec.	Bellevue	\$10
342	BR Capital, Inc.	Wealth Mgm't	Camas	\$10
343	Cetera Advisors, LLC	Broker Dealer, Investm't Advisor	Multiple Offices	\$10
344	Clearbrook Investment Management	Wealth Mgm't	Bellingham	\$10
345	Coast Capital Management, LLC	Wealth Mgm't/Pension & Profit Sh.	Bainbridge Island	\$10
346	Decker Retirement Planning, Inc.	Wealth Mgm't	Kirkland/Seattle/UT	\$10
347	Securian Advisors NW(Securian Fin Svcs Inc)	Financial Planning/Insurance	Bellevue	\$10
348	Sitka Pacific Capital Management, LLC	Wealth Mgm't	Edmonds	\$10
349	Steward Capital, LLC	Wealth Mgm't	Bellevue	\$10
350	Tenere, LLC	Wealth Mgm't	Issaquah	\$10
351	Wilkison Investment Services, LLC	Wealth Mgm't	Snoqualmie	\$10
352	Directional Financial Services, LLC	Wealth Mgm't	Seattle	\$9

353	Lin Capital Management, LLC	Wealth/Hedge Fund Mgm't	Issaquah	\$9
354	Pegasus Investment Mgm't, LLC	Wealth/Hedge Fund Mgm't	Bainbridge Island	\$8
355	Signal Financial Planning, LLC	Wealth Mgm't	Issaquah	\$8
356	Hernandez Financial	Wealth Mgm't	Sunnyside	\$7
357	Hana Road Capital, LLC	Wealth Mgm't/Hedge Fund	Seattle	\$5
358	Voya Financial Advisors	Wealth Mgm't	Bellevue	\$5
359	Banner Investment Consultants	Wealth Mgm't	Anacortes	\$4
360	Chernofsky Financial, LLC	Wealth Mgm't	Vancouver	\$4
361	Firebrand Wealth Management, LLC	Wealth Mgm't	Seattle	\$4
362	Tracker Research, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$4
363	Firebrand Wealth Management, LLC	Wealth Mgm't	Seattle	\$4
364	Capital Management Resources, LLC	Wealth Mgm't	Port Orchard	\$3
365	Childress Investment Mgm't	Wealth Mgm't	Bellevue	\$3
366	Creative Retirement Planning, Inc.	Wealth Mgm't	Sq'm/Sivrld/Cpev'l/Shore'n	\$3
367	NUKU Asset Management, Inc.	Wealth Mgm't	Bainbridge Island	\$3
368	Strategic Asset Management	Wealth Mgm't	Tacoma	\$3
369	Vail Ridge Capital, LLC	Wealth Mgm't	Bellingham	\$3
370	Core Capital Advisors, LLC	Wealth Mgm't	Olympia	\$2
371	Janice Penar	Wealth Mgm't/Tax Services	Spokane	\$2
372	Moe Investment Management, LLC	Wealth Mgm't	Spokane	\$2
373	Portfolio Advisors Group, Inc.	Wealth Mgm't	Gig Harbor	\$2
374	Seagrass Advisors, LLC	Wealth Mgm't	Bellevue	\$2
375	Summit Family Office Services, LLC	Wealth Mgm't	Bellevue	\$2
376	Unleashed Financial, LLC	Wealth Mgm't	Kirkland	\$2
377	Comus Investment, LLC	Wealth Mgm't	Olympia	\$1
378	Pi Square Capital, LLC	Wealth Mgm't	Bellevue	\$1
379	Salmon Bay Wealth Management, LLC	Wealth Mgm't	Seattle	\$1

Last edited on: 3/31/21 at 6:00 pm

Total AUM = \$1,065,814,000,000