



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

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

Rank	Manager	Manager Type	City	Assets
299	Abraham & Co., Inc.	Wealth Mgm't	Gig Harbor	\$26
58	Acuitas Investments, LLC	Money Management/Mutual Funds	Seattle	\$845
216	Adams Financial Concepts, LLC	Wealth Mgm't	Seattle	\$80
162	Agate Pass Investment, LLC	Wealth Mgm't	Bainbridge Island	\$156
220	Alliant Securities, Inc.	Wealth Mgm't	Liberty Lake/Spokane	\$77
221	Allison Spielman Advisors/Allison Miller, LLC	Wealth Mgm't	Bellevue	\$77
333	American Northwest Advisory Svcs, LLC	Wealth Mgm't/Pension & Profit Sh.	Federal Way	\$13
109	Archon Capital Mgm't, LLC	Hedge Fund Mgm't	Seattle	\$330
341	Ariston Capital Mgm't Corp.	Money Mgm't/Mutual Fund Spec.	Bellevue	\$10
123	ASI Wealth Management	Wealth Mgm't	Seattle & 3 Oregon Offices	\$278
194	Aspire Capital Advisors, LLC	Wealth Mgm't	Seattle	\$111
184	Asset Planning & Management, Inc.	Wealth Mgm't	Spokane	\$117
280	Asymmetric Advantage Capital Mgm't, LLC	Wealth Mgm't	Bellevue	\$36
66	Auxano Advisors, LLC	Wealth Mgm't	Kirkland	\$710
89	Avier Wealth Advisors	Wealth Mgm't	Bellevue/Lake Oswego,OR	\$454
168	Aviso Wealth Management	Wealth Mgm't	Seattle/PA/ME/MD	\$143
135	BAC Capital Advisors, LLC	Wealth Mgm't/Pension & Profit Sh.	Seattle	\$223
29	Badgley Phelps Wealth Managers	Wealth Mgm't	Seattle	\$3,196
24	Baird Investment Group/Robert W. Baird & Co.	Broker Dealer, Investm't Advisor	Seattle/Yakima/Mt. Vernon	\$3,553
359	Banner Investment Consultants	Wealth Mgm't	Anacortes	\$4
44	Barwick & Partners, Inc.	Wealth Mgm't	Seattle	\$1,861
195	BBJS Financial Advisors, LLC	Wealth Mgm't	Seattle	\$107
297	BBM Financial Services, Inc.	Wealth Mgm't/Pension & Profit Sh.	Yakima	\$28

152	Bear Mountain Capital	Private Fund Mgm't	Seattle	\$184
127	Bellevue Asset Mgm't, LLC	Wealth Mgm't	Bellevue	\$262
217	Bellingham Capital	Wealth Mgm't	Bellingham/Anacortes	\$79
55	Benchmark Plus Management, LLC	Wealth/Hedge Fund Mgm't	Tacoma/New Jersey	\$942
177	BHJ Wealth Advisors	Wealth Mgm't	Gig Harbor	\$127
76	Blackcrane Capital	Wealth/Hedge Fund Mgm't	Bellevue	\$564
136	Bogdanovich Wealth Management, PLLC	Wealth Mgm't	Edmonds	\$220
150	Boone Wealth Advisors, LLC	Wealth Mgm't	Bellevue	\$187
263	Bordeaux Wealth Advisors	Wealth Mgm't	Bellevue	\$50
342	BR Capital, Inc.	Wealth Mgm't	Camas	\$10
233	Brackenwood Capital Management	Wealth Mgm't	Bainbridge Island	\$70
151	Breakwater Investment Management	Wealth Mgm't	Seattle	\$185
11	Brighton Jones, LLC	Wealth Mgm't	Seattle/SF/AZ/DC/OR	\$6,800
49	Bristlecone Advisors, LLC	Wealth Mgm't	Seattle	\$1,334
202	Buckley Investment Group, LLC	Wealth Mgm't	Walla Walla	\$98
213	Byrne & Company Wealth Management	Wealth Mgm't	Olympia	\$82
208	Cadence Wealth Management	Wealth Mgm't	Seattle	\$89
115	Canterbury Consulting, Inc.	Wealth Mgm't	Seattle/CA	\$300
262	Capital Investment Services, LLC	Wealth Mgm't/Tax Services	Lynnwood	\$50
364	Capital Management Resources, LLC	Wealth Mgm't	Port Orchard	\$3
91	Capital Planning, LLC	Wealth Mgm't	Bellevue	\$435
300	Catton Financial Services	Wealth Mgm't	Spokane	\$26
331	Cedar River Capital, LLC	Wealth Mgm't	Seattle	\$14
343	Cetera Advisors, LLC	Broker Dealer, Investm't Advisor	Multiple Offices	\$10
121	Chaney Capital Mgm't	Wealth Mgm't	Lynnwood	\$282
360	Chernofsky Financial, LLC	Wealth Mgm't	Vancouver	\$4
365	Childress Investment Mgm't	Wealth Mgm't	Bellevue	\$3
158	Christensen, King & Assoc. Investment Svcs.	Wealth Mgm't	Richland	\$169
335	CIM Financial Group, Inc.	Wealth Mgm't	Lynnwood	\$12
53	Citi Private Bank	Wealth Mgm't	Seattle	\$1,000
249	Clear Wealth Management, LLC	Wealth Mgm't	Lynnwood/NY	\$58
344	Clearbrook Investment Management	Wealth Mgm't	Bellingham	\$10
345	Coast Capital Management, LLC	Wealth Mgm't/Pension & Profit Sh.	Bainbridge Island	\$10
22	Coldstream Wealth Management	Wealth Mgm't	Bellevue/Seattle	\$4,140
169	Columbia Advisory Partners, LLC	Wealth Mgm't	Spokane	\$143
43	Columbia Pacific Advisors, LLC	Hedge Fund Mgm't	Seattle	\$1,912
20	Columbia Pacific Wealth Management	Wealth Mgm't	Seattle	\$4,470
103	Columbia River Advisors, LLC	Wealth Mgm't	Tacoma	\$365
276	Commencement Financial Planning, LLC	Wealth Mgm't	Tacoma	\$40
312	Commodore Asset Management, LLC	Wealth Mgm't	Tacoma	\$20
294	Companion Portfolio Management, Inc.	Wealth Mgm't	Sequim	\$29
131	Comprehensive Wealth Mgm't	Wealth Mgm't	Lynnwood	\$242
377	Comus Investment, LLC	Wealth Mgm't	Olympia	\$1
117	Conover Capital Management, LLC	Wealth Mgm't	Bellevue	\$293
105	Conway Jarvis & Associates, LLC	Wealth Mgm't	Seattle	\$355
370	Core Capital Advisors, LLC	Wealth Mgm't	Olympia	\$2
366	Creative Retirement Planning, Inc.	Wealth Mgm't	Sq'm/Slvrdl/Cpev'l/Shorel'n	\$3

70	Cutler Investment Counsel, LLC	Wealth Mgm't/Mutual Funds	Seattle/OR/VA	\$671
92	CWH Capital Mgm't, Inc.(dba Hart Capital Mgm't)	Wealth Mgm't	Spokane/Idaho	\$434
21	D.A. Davidson & Co.	Broker Dir/Wealth Mgm't/Trust	WA/MT/NE/CA	\$4,400
46	D'Annunzio Consulting Group, LLC	Wealth Mgm't	Tacoma	\$1,609
346	Decker Retirement Planning, Inc.	Wealth Mgm't	Kirkland/Seattle/UT	\$10
155	Demars Financial Group	Wealth Mgm't	Spokane,./Kenai, AK	\$182
182	Dental Wealth Advisors, LLC	Wealth Mgm't	Kirkland	\$122
261	Dightman Capital Group, Inc.	Wealth Mgm't	Seattle, Kansas	\$52
352	Directional Financial Services, LLC	Wealth Mgm't	Seattle	\$9
88	Duncan & Haley, LTD	Wealth Mgm't	Seattle	\$458
206	Eagle Harbor Asset Mgm't	Wealth Mgm't	Seattle	\$93
5	Edge Asset Mgm't Inc./Princ. Globe Investors	Money Mgm't/Mutual Fund Mgrs.	Seattle	\$14,800
74	Elite Wealth Management, Inc./Lattice Capital	Wealth Mgm't/Hedge Fund Mgm't	Kirkland	\$595
139	Elliott Cove Cap. Mgm't	Wealth Mgm't	Seattle	\$215
36	Empirical Wealth Mgm't, LLC	Wealth Mgm't	Seat/Blvu/Spok'n/AK/CA/OR	\$2,664
86	EP Wealth Advisors, LLC(Conlon & Dart, LLC)	Wealth Mgm't	Seattle/CA/CO	\$485
125	EQ Wealth Management	Wealth Mgm't	Mercer Island	\$273
141	Etesian Wealth Advisors, Inc.	Wealth Mgm't	Spokane/Portland	\$214
157	Evans Capital Mgm't Associates	Wealth Mgm't/Insurance	Seattle/Bellevue	\$170
31	Evergreen Gavekal	Wealth Mgm't	Bellevue	\$2,950
258	Evergreen Wealth Management Services, Inc.	Wealth Mgm't	Port Ludlow	\$52
215	Fairview Partners Investment Mgm't, LLC	Hedge Fund Mgm't	Seattle	\$80
116	Fiduciary Counselling, Inc.	Wealth Mgm't	Tacoma	\$300
6	Financial Advocates Investment Mgm't	Wealth Mgm't/Broker-Dealer/RIA	Olympia, Portland	\$11,012
93	Financial Insights, Inc.	Wealth Mgm't	Tacoma	\$426
65	Financial Plan, Inc.	Wealth Mgm't	Bellingham	\$731
240	Financial Research, Inc.	Wealth Mgm't	Issaquah	\$65
281	FIOH Global Asset Mgm't and Strategies, LLC	Wealth Mgm't	Seattle	\$36
361	Firebrand Wealth Management, LLC	Wealth Mgm't	Seattle	\$4
363	Firebrand Wealth Management, LLC	Wealth Mgm't	Seattle	\$4
283	Firewall Capital Management	Wealth Mgm't	Enumclaw	\$34
68	First Pacific Financial, Inc.	Wealth Mgm't	Vancouver	\$683
3	Fisher Investments	Wealth Mgm't	Camas	\$120,950
252	Fleckenstein Capital, Inc.	Hedge Fund Mgm't	Seattle	\$56
239	Flohr Asset Management, LLC	Wealth Mgm't/Hedge Fund	Bellevue	\$66
295	Flow Financial Planning, LLC	Wealth Mgm't	Bellingham	\$29
296	Flow Financial Planning, LLC	Wealth Mgm't	Bellingham	\$29
185	Fort Vancouver Investment Management, LLC	Wealth Mgm't	Vancouver/Portland	\$117
170	Fortis Capital Management LLC	Wealth Mgm't	Seattle	\$141
171	Fortitude Advisory Group, LLC	Wealth Mgm't	Gig Harbor	\$138
13	Freestone Capital Mgm't, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$5,402
79	FRG Family Wealth Advisors	Wealth Mgm't	Bellevue/AZ/CA/TX	\$550
307	FSR Wealth Management	Wealth Mgm't	Bellingham	\$23
67	Fulcrum Capital, LLC	Wealth Mgm't	Seattle	\$701
291	Fulcrum Wealth Advisors, LLC	Wealth Mgm't	Bellevue	\$30
274	Gallagher Capital Corp.	Wealth Mgm't	Bainbridge Island	\$41
50	Garde Capital, Inc.	Wealth Mgm't	Seattle	\$1,275

138	Garland Capital Mgm't, Inc.	Wealth Mgm't	Bellevue	\$217
301	GK Capital Partners	Wealth/Hedge Fund Mgm't	Olympia	\$25
214	Goldbloom Wealth Management, LLC	Wealth Mgm't	Bellevue	\$82
129	Great Northern Asset Management, LLC	Wealth Mgm't	Vancouver	\$244
52	Greene Wealth Management, LLC	Wealth Mgm't	Seattle	\$1,030
204	Gregory Lyle & Company	Wealth Mgm't	Clinton	\$97
211	Griffiths, Dreher & Evans, PS, CPAs	Wealth Mgm't/Tax Services	Spokane	\$84
324	Gunn Capital Management, LLC	Wealth Mgm't	Pateros	\$16
179	Halbert Hargrove	Wealth Mgm't	Bellevue/Multi-state	\$125
137	Hamrick Investment Counsel, LLC	Wealth Mgm't	Seattle	\$220
357	Hana Road Capital, LLC	Wealth Mgm't/Hedge Fund	Seattle	\$5
264	Hancock Fielder Retirement Strategies, Inc.	Wealth Mgm't	Federal Way	\$49
107	Harbour Investment Mgm't, LLC	Wealth Mgm't	Edmonds	\$345
128	Harlow Wealth Management, Inc.	Tax Services	Vancouver	\$255
236	Hawkins Investment Counsel, LLC	Wealth Mgm't	Port Orchard	\$67
104	HBC Financial Services, PLLC	Wealth Mgm't/Tax Services	Seattle	\$364
231	Helium Advisors, LLC	Wealth Mgm't	Bellevue	\$72
193	Helm Capital Management, LLC	Wealth Mgm't/Hedge Fund	Seattle	\$112
175	Helmsman Financial Group, LLC	Wealth Mgm't, Tax/Fin. Services	Woodinville	\$129
356	Hernandez Financial	Wealth Mgm't	Sunnyside	\$7
113	Highbury Pacific Capital Corp.	Wealth Mgm't	Seattle	\$308
62	Highland Private Wealth Mgm't	Wealth Mgm't	Bellevue	\$817
71	Hightower Advisors, LLC (prev. Triad Wealth)	Wealth Mgm't	Bellevue	\$651
207	Hot Creek Capital, LLC	Wealth Mgm't	Seattle	\$93
338	Howe Financial Advisory, LLC	Wealth Mgm't	Seattle	\$11
163	ICM Asset Mgm't, Inc.	Wealth/Hedge Fund Mgm't	Spokane	\$156
227	Informed Investors Group	Wealth Mgm't/Socially Resp. Inv.	Seattle	\$74
118	Integrity Financial Corp.	Wealth Mgm't/Consulting Svcs.	Bellevue/CA/FLA/OR	\$293
228	Integrity Wealth Management, Inc.	Wealth Mgm't	Spokane	\$74
321	Interfund Management Services, Inc.	Wealth Mgm't	Roslyn	\$17
15	Invesco Managed Accounts, LLC	Fixed Inc Asset Manager	Seattle/Portland/S.F.	\$5,134
266	Investor Resources, Inc.	Wealth Mgm't	Bellevue/Port Orchard	\$48
164	Investor's Fiduciary Advisor Network, LLC	Wealth Mgm't	Snoqualmie	\$153
209	Investors Portfolio Services, LLC	Wealth Mgm't	Puyallup	\$86
315	Ironstream Capital, LLC	Wealth Mgm't	Seattle	\$19
87	James R. Martin Consulting, Inc.	Wealth Mgm't/Consulting Svcs.	Vancouver	\$461
371	Janice Penar	Wealth Mgm't/Tax Services	Spokane	\$2
325	Janis Financial, LLC	Wealth Mgm't	Bainbridge Island	\$16
161	Jarvis Financial Services, Inc.	Wealth Mgm't	Federal Way	\$158
190	John T. McCarthy, LLC	Wealth Mgm't	Spokane	\$114
200	Johnson & Shute Investment Advisors, Inc.	Wealth Mgm't/Tax Services	Bellevue	\$101
286	Journey Financial Services	Wealth Mgm't	Edmonds	\$34
305	Julie A. Wurst, CFP, LLC	Wealth Mgm't	Tacoma	\$25
336	K.L. Baird Asset Mgm't	Wealth Mgm't	Bothell	\$12
234	Kairos Capital Management, LLC	Wealth Mgm't	Bellevue	\$69
167	Kaizen Financial Advisors, LLC	Wealth Mgm't	Kirkland	\$146
311	Kamada Investment Management	Wealth Mgm't	Bellevue	\$21

225	Karel Capital, Inc.	Wealth Mgm't	Spokane	\$75
176	Kaufman Kampe Advisors, LLC	Wealth Mgm't	Mercer Island	\$128
271	Kelp Capital, LLC	Wealth Mgm't	Seattle	\$43
39	Key Private Bank	Wealth/Trust Mgm't	Seattle/Tac/Blvue/Bellghm	\$2,226
61	Kiley Juergens Wealth Management, LLC	Wealth Mgm't	Olympia	\$827
54	Kosmos Management, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$992
27	Kunath Karren Rinne & Atkin, LLC	Wealth Mgm't	Seattle	\$3,240
99	Kutscher Benner Barsness & Stevens, Inc.	Wealth Mgm't	Seattle	\$386
16	Laird Norton W'lth Mgm't(Strat./Trust Co, LLC)	Wealth Mgm't/Trust Mgm't	Seattle	\$5,100
126	Lakeside Advisors, Inc.	Wealth Mgm't	Seattle	\$270
316	Latticework Capital	Wealth Mgm't/Hedge Fund	Sammamish	\$19
186	Leeward Financial Partners, LLC	Wealth Mgm't	Seattle	\$117
188	Leeward Financial Partners, LLC	Wealth Mgm't	Seattle	\$117
82	Leonard Rickey Investment Advisors, PLLC	Wealth Mgm't	Yakima	\$511
154	Lesa Sroufe & Company, Inc.	Wealth Mgm't	Seattle	\$183
278	Lifefocus Financial Advisors, LLC	Wealth Mgm't/Tax Services	Walla Walla	\$39
353	Lin Capital Management, LLC	Wealth/Hedge Fund Mgm't	Issaquah	\$9
142	Lincoln Invstment Plng (IA'sTremper & Roper)	Wealth Mgm't	Renton	\$212
308	Long Term Investors, LLC	Wealth Mgm't	Wenatchee	\$23
75	Lucid Advisors, Inc.	Wealth Mgm't	Seattle	\$574
322	Ludeman Capital Management, Inc.	Wealth Mgm't	Ferndale	\$17
143	Madison Park Capital Advisors, LLC	Wealth Mgm't	Seattle	\$210
156	Madrona Financial Services, LLC	Wealth Mgm't	Everett/Blvue/Seattle	\$176
235	Mangan Wealth Management	Wealth Mgm't	Seattle	\$68
106	Marshall & Sullivan, Inc.	Wealth Mgm't	Seattle	\$349
247	Martin Nelson & Co., Inc.	Wealth Mgm't	Seattle	\$59
313	McBee Advisors, Inc.	Wealth Mgm't	Bellevue, Glendale AZ	\$20
187	McBride Financial Advisors, LLC	Wealth Mgm't	Seattle	\$117
30	McCutchen Group, LLC	Wealth Mgm't	Seattle	\$3,006
84	McIlrath and Eck, LLC	Wealth Mgm't	Arlington	\$494
284	MCM Advisory, LLC	Wealth Mgm't	Federal Way	\$34
317	Mellor & Associates, LLC	Wealth Mgm't	Bellevue	\$19
253	Mercer Asset Mgm't, Inc.	Wealth Mgm't	Bainbridge Island	\$56
83	Mercer Global Advisors, Inc.	Wealth Mgm't	Bellevue/Multi-state	\$500
318	Meridan Capital, LLC	Wealth/Hedge Fund Mgm't	Bellevue	\$18
269	Meridian Wealth Management, LLC	Wealth Mgm't	Bellevue	\$45
35	Merriman Wealth Management, LLC	Wealth Mgm't	Seattle/Spokane/Eugene	\$2,715
270	Michael Pace, CFP	Wealth Mgm't	Seattle	\$45
229	Middleton & Company	Wealth Mgm't	Vancouver	\$74
145	Miller Advisors, Inc.	Wealth Mgm't	Kirkland	\$204
4	Milliman, Inc.	Wealth Mgm't/Pension Consultants	Seattle/Multiple Offices	\$45,362
372	Moe Investment Management, LLC	Wealth Mgm't	Spokane	\$2
243	Monson Wealth Management, Inc.	Wealth Mgm't	Kennewick	\$60
248	Moore Wealth Management, LLC	Wealth Mgm't	Renton	\$59
165	Moser Wealth Advisors, LLC	Wealth Mgm't/Tax Services	Bellevue	\$151
32	Moss Adams Wealth Advisors	Wealth Mgm't	Seattle/Everett/Tac/Yakima	\$2,804
78	Mountain Pacific Advisors, LLC	Hedge Fund/Pens./Profit-Sharing	Bellevue	\$551

180	Murphy Investment Management, LLC	Wealth Mgm't	Spokane	\$125
319	Nelson Financial Management, LLC	Wealth Mgm't	Kirkland	\$18
73	Newfocus Financial Group, LLC	Wealth Mgm't	Vancouver/Portland/S.F.	\$603
196	Newground Social Investment	Wealth Mgm't	Seattle	\$107
199	Nierenberg Investment Management Company, Inc	Wealth/Hedge Fund Mgm't	Camas	\$102
110	Northern Capital Management, Inc.	Wealth Mgm't	Spokane	\$328
292	Northern Lights Advisors, Inc.	Wealth Mgm't	Seattle	\$30
25	Northern Trust Bank	Wealth/Trust Mgm't	Seattle	\$3,400
90	Northwest Administrators, Inc.	Pension/Trust Administration	Seattle	\$442
37	Northwest Asset Management	Wealth Mgm't	Mercer Island	\$2,532
272	Northwest Financial Choices	Wealth Mgm't/Tax Planning	Renton	\$43
337	Northwest Investment Advisors, Inc.	Broker Dealer, Investm't Advisor	Spokane	\$12
95	Northwest Investment Consulting, Inc.	Wealth Mgm't	Seattle	\$404
232	NR Smith & Associates, P.S.	Wealth Mgm't/Tax Services	Olympia	\$72
367	NUKU Asset Management, Inc.	Wealth Mgm't	Bainbridge Island	\$3
323	NWT Advisors, LLC	Wealth Mgm't/Tax Services	Duvall	\$17
72	Oak Harbor	Wealth/Hedge Fund Mgm't	Seattle	\$606
130	Oliver Capital Mgm't, Inc.	Wealth Mgm't	Seattle	\$243
172	Olson Investment Advisors, LLC	Wealth Mgm't	Seattle	\$134
197	Olympic Wealth Management, LLC	Wealth Mgm't	Bothell	\$106
256	Omega Financial Investment & Insurance	Financial Planning/Insurance	Kirkland	\$54
302	Opal Advisors, LLC	Wealth Mgm't/Hedge Fund Mgm't	Bellevue	\$25
28	Oppenheimer & Co., Inc.	Wealth Mgm't	Seattle/Multi-Office	\$3,235
198	Optimist Retirement, LLC	Wealth Mgm't	Bellevue/Scottsdale AZ	\$103
148	Pacific Asset Mgm't, LLC	Wealth Mgm't	Pt Orchard/Gig Hbr/Shelton	\$190
250	Pacific Crest Financial Advisors, LLC	Wealth Mgm't/Inv. Advisors	Everett/Seattle	\$58
114	Pacific Current Group	Hedge Fund Mgm't	Seattle/Tacoma	\$303
293	Pacific Horizon Investment Management, LLC	Wealth Mgm't	Seattle	\$30
267	Pacific Northwest Asset Management	Wealth Mgm't	Seattle	\$48
23	Pacific Portfolio Consulting, LLC	Wealth Mgm't	Seattle	\$3,766
111	Palouse Capital Mgm't, Inc. (prev.Ken Roberts)	Wealth Mgm't	Spokane	\$315
48	Paracle Advisors, LLC	Wealth Mgm't	Mercer Island	\$1,400
1	Parametric Portfolio Associates	Money Mgm't/Mutual Fund Spec.	Seattle	\$355,000
237	Parker Financial, LLC	Wealth Mgm't	Silverdale	\$67
19	Pathstone (Prev. Cornerstone Advisors, Inc.)	Wealth Mgm't/Family Office Svcs.	Blvue/Seattle/Anchorage	\$4,500
241	Paysse Jennison, Inc.	Wealth Mgm't	Mercer Island	\$62
354	Pegasus Investment Mgm't, LLC	Wealth/Hedge Fund Mgm't	Bainbridge Island	\$8
254	Pengra Capital Mgm't, Inc.	Wealth Mgm't/Hedge Fund	Seattle	\$56
332	Percension Wealth Advisors, LLC	Wealth Mgm't	Seattle	\$14
101	Personal Investment Mgm't, Inc.	Wealth Mgm't	Redmond	\$382
60	Petersen Hastings Investment Mgm't, Inc.	Wealth Mgm't	Kennewick	\$830
238	Peterson Investment Mgm't, Inc.	Wealth Mgm't	Spokane	\$67
378	Pi Square Capital, LLC	Wealth Mgm't	Bellevue	\$1
273	PLM Investment Advisors, Inc.	Wealth Mgm't	Spokane	\$42
287	Point Defiance Capital Management, LLC	Wealth/Hedge Fund Mgm't	Tacoma	\$32
303	Polaris Asset Mgm't, LLC	Wealth Mgm't	Seattle	\$25
373	Portfolio Advisors Group, Inc.	Wealth Mgm't	Gig Harbor	\$2

181	Portfolio Strategies, Inc.	Wealth Mgm't	Tacoma	\$125
242	Prentice Financial Planning, LLC	Wealth Mgm't	Olympia	\$61
222	Prevail Wealth Management, LLC	Wealth Mgm't	Kirkland	\$77
306	Prism Capital Management, LLC	Wealth Mgm't	Seattle	\$24
102	Private Advisory Group	Wealth Mgm't	Redmond	\$368
178	Private Asset Mgm't	Wealth Mgm't	Kirkland	\$127
77	Private Income Capital Management	Wealth Mgm't	Seattle	\$553
97	Private Ocean Wealth Management	Wealth Mgm't	Seattle/CA	\$400
309	Private Wealth Management Solutions, LLC	Wealth Mgm't	Bellevue	\$23
327	Pro Money Management, LLC	Wealth Mgm't	Walla Walla	\$15
244	Professional Investment Management Services, PI	Wealth Mgm't	Kennewick	\$60
8	Pugh Capital Mgm't, Inc.	Institutional Fixed Inc. Money Mgr	Seattle	\$8,875
98	Quantum Financial Planning Services, Inc.	Wealth Mgm't	Spokane	\$387
255	R. Brian Howell & Associates, Inc.	Wealth Mgm't	Tacoma	\$55
268	Ragnar Wealth Management, LLC	Wealth Mgm't	Tumwater/Bellingham	\$46
279	Rainier Wealth Management, LLC	Wealth Mgm't	Mukilteo	\$38
134	Ramsey & Associates, Inc.	Wealth Mgm't	Seattle	\$225
85	Raymond James Financial Services, Inc.	Broker Dealer, Investm't Advisor	Multiple OfficesMill Creek	\$490
259	Renaissance Wealth Counsel, LLC	Wealth Mgm't/Tax Services	Bellevue	\$52
153	Richards, Merrill & Peterson, Inc.	Wealth Mgm't	Spokane	\$184
108	Robinswood Financial, LLC	Wealth Mgm't	Kirkland	\$336
159	Runde & Co., LLC	Wealth Mgm't	Seattle	\$165
2	Russell Investment Group	Money Management	Seattle	\$297,500
133	S.R. Schill & Assoc., Inc.	Wealth Mgm't	Mercer Island	\$233
257	Sabin Investment Management, Inc.	Wealth Mgm't	Gig Harbor	\$54
379	Salmon Bay Wealth Management, LLC	Wealth Mgm't	Seattle	\$1
144	Sander Capital Advisors	Wealth Mgm't	Seattle	\$210
191	Sapphire Star Capital, LLC	Wealth/Hedge Fund Mgm't	Kirkland	\$114
18	Saturna Capital Corporation	Money Mgm't/Mut'l Fnd Spec/B-Dlr	Bellingham	\$5,100
94	Schmidt Financial Group, Inc.	Wealth Mgm't	Kirkland/Mtn View, CA	\$414
275	SCS Systems, Inc.	Wealth Mgm't	East Sound	\$41
374	Seagrass Advisors, LLC	Wealth Mgm't	Bellevue	\$2
339	Seattle Asset Mgm't, Inc.	Wealth Mgm't	Bainbridge Island	\$11
226	Seattle Portfolio Company	Wealth Mgm't	Seattle	\$75
347	Securian Advisors NW(Securian Fin Svcs Inc)	Financial Planning/Insurance	Bellevue	\$10
57	SEI Huntington Steele, LLC	Wealth Mgm't	Seattle/Multi-state Offices	\$848
230	Selkirk Wealth Advisors, LLC	Wealth Mgm't	Spokane	\$73
149	Seneschal Advisors, LLC	Wealth Mgm't	Tacoma	\$190
245	Sherwood Investment Services	Wealth Mgm't	Redmond	\$60
355	Signal Financial Planning, LLC	Wealth Mgm't	Issaquah	\$8
251	Signia Capital Management, LLC	Institutional Money Mgm't/Value	Spokane	\$57
10	Silver Creek Capital Mgm't, LLC	Hedge Fund Mgm't	Seattle	\$6,988
246	Simple Wealth, LLC	Wealth Mgm't	Spokane	\$60
348	Sitka Pacific Capital Management, LLC	Wealth Mgm't	Edmonds	\$10
140	Skyline Advisors, Inc.	Wealth Mgm't	Bellingham	\$215
146	Smart Portfolios, LLC	Wealth Mgm't	Lake Forest Park	\$203
132	Snider Financial Group	Wealth Mgm't	Bellevue	\$235

119	Sonata Capital Group, Inc.	Wealth Mgm't	Seattle	\$290
314	Sound Financial Center	Wealth Mgm't	Sequim	\$20
212	Sound Financial Planning, Inc.	Wealth Mgm't	Mt. Vernon	\$84
282	Sound Investment Strategies, Inc.	Wealth Mgm't	Bothell	\$35
63	Soundmark Wealth Management, LLC	Wealth Mgm't	Kirkland	\$805
120	Soundview Advisors	Wealth Mgm't	Seattle/Olympia	\$288
122	Sovereign Wealth Advisors, Inc.	Wealth Mgm't	Bellevue	\$280
219	Stapp Wealth Management, PLLC	Wealth Mgm't/Tax Services	Olympia	\$78
42	Steelhead Partners, LLC	Hedge Fund Mgm't	Seattle	\$1,975
349	Steward Capital, LLC	Wealth Mgm't	Bellevue	\$10
260	Stewardship Concepts Financial Services, LLC	Wealth Mgm't	Spokane	\$52
210	Stock Mgm't, LLC	Wealth Mgm't	Puyallup	\$86
174	Stolz & Associates, PS	Wealth Mgm't	Tacoma	\$130
298	Stonebridge Capital Management NW, LLC	Wealth Mgm't	Gig Harbor	\$28
368	Strategic Asset Management	Wealth Mgm't	Tacoma	\$3
47	Strategic Income Management, LLC	Money Mgm't/Mutual Fund Mgrs.	Seattle	\$1,404
81	Strategic Wealth Mgm't, Inc.	Wealth Mgm't/Native Amer. Tribes	Kirkland	\$528
375	Summit Family Office Services, LLC	Wealth Mgm't	Bellevue	\$2
124	Synergy Financial Mgm't, LLC	Wealth Mgm't	Bellevue	\$273
288	Tacoma Investment Group	Wealth Mgm't	Tacoma	\$31
33	Taiyo Pacific Partners L.P.	Hedge Fund Mgm't	Kirkland	\$2,800
96	Talbot Financial, LLC	Wealth Mgm't	Bellevue	\$402
59	Ten Capital Investment Advisors, LLC	Wealth Mgm't	Spokane	\$845
350	Tenere, LLC	Wealth Mgm't	Issaquah	\$10
203	TFS Advisors, LLC	Wealth Mgm't	Edmonds	\$98
328	The Advisor Benefits Group, Inc.	Financial Planning/Insurance	Kennewick	\$15
289	The Boyle Group Wealth Management	Wealth Mgm't	Seattle	\$31
45	The Caprock Group, Inc.	Wealth Mgm't	Mercer Island/Idaho/Calif.	\$1,800
41	The Clarius Group, LLC	Wealth Mgm't	Bellevue	\$2,039
38	The Pacific Financial Group	Wealth Mgm't	Bellevue	\$2,336
189	The Planner's Edge, LLC	Wealth Mgm't	Mercer Island	\$115
147	The Retirement Solution, Inc.	Wealth Mgm't	Redmond	\$197
265	Therese Govern Financial Advisors, LLC	Wealth Mgm't	Seattle	\$49
304	Thome Financial Mgm't, LLC	Wealth Mgm't	Bellevue	\$25
26	Tiedemann Advisors, LLC	Wealth Mgm't/Family Office Svcs.	Seattle/NY/Multi-state	\$3,347
166	Tieton Capital Management, LLC	Money Manager, Small Cap. Val.	Yakima	\$150
290	Timepiece Financial Planning, Inc.	Wealth Mgm't	Vancouver	\$31
362	Tracker Research, LLC	Wealth/Hedge Fund Mgm't	Seattle	\$4
56	Tradewinds Capital Management, LLC	Wealth Mgm't	Bellingham/Shoreline	\$921
340	Trail Financial Planning, LLC	Wealth Mgm't	Bellingham	\$11
100	Trellis Advisors, LLC	Wealth Mgm't	Seattle/Ellensburg	\$386
173	TrueNorth Wealth Advisors	Wealth Mgm't	Seattle	\$132
64	Trutina Financial	Wealth Mgm't	Bellevue	\$791
201	Turloff Financial Consulting, Inc.	Wealth Mgm't	Bainbridge Island	\$99
14	U.S. Trust/Bank of America	Wealth/Trust Mgm't	Seattle/Multi-state Offices	\$5,250
112	Umpqua Investments, Inc.	Wealth/Trust Mgm't	OR/CA/WA	\$313
51	Union Bank	Wealth/Trust Mgm't	Portland/Seattle/Tacoma	\$1,050

376	Unleashed Financial, LLC	Wealth Mgm't	Kirkland	\$2
17	US Bank Private Client Group	Wealth/Trust Mgm't	Prtlnd/Seattle/Cour de L'ne	\$5,100
369	Vail Ridge Capital, LLC	Wealth Mgm't	Bellingham	\$3
12	Verus Advisory, Inc.(prev. Wurts & Assoc.)	Wealth Mgm't/Pension & Profit Sh.	Seattle/L.A./S.F.	\$5,684
80	Vestory, LLC	Wealth Mgm't	Blvue,Lakew'd,Scottsdale	\$537
329	Viceroy Investment Advisors LLC	Wealth Mgm't	Mill Creek	\$15
192	Viewpoint Capital Management, LLC	Wealth Mgm't	Seattle	\$114
69	Viridian RIA, LLC	Wealth Mgm't	Seattle	\$678
310	Vorpahl Wing Securities, Inc.	Wealth Mgm't	Spokane	\$22
358	Voya Financial Advisors	Wealth Mgm't	Bellevue	\$5
326	Waits Investments, LLC	Wealth Mgm't	Spokane	\$16
205	Warga Asset Mgm't	Wealth Mgm't	Kirkland	\$97
9	Washington Capital Mgm't, Inc.	Wealth Mgm't	Seattle/OR/CA/MA	\$7,247
334	WaterHill Capital, LLC	Wealth/Hedge Fund Mgm't	Kenmore	\$13
183	Waycross Investment Mgm't Company	Wealth Mgm't	Bellingham	\$122
160	Wealth Asset Managers/Nelson Securities	Wealth Mgm't	Spokane	\$160
285	Wealth-Builders, Inc.	Wealth Mgm't/Tax Services	Mercer Island	\$34
277	WealthCollab, LLC	Wealth Mgm't	Bellevue	\$40
223	Wealthmark, LLC	Wealth Mgm't	Bellingham	\$77
7	Wells Fargo Wealth Management Group	Wealth/Trust Mgm't	Seattle/Tacoma/Bellevue	\$9,408
330	Westface Financial Advisory	Wealth Mgm't	Vancouver	\$15
40	WestRiver Management, LLC	Wealth/Hedge Fund Mgm't	Kirkland	\$2,112
224	White & Company Financial Planning, Inc.	Wealth Mgm't	Sunnyside	\$76
218	Wilhelm Financial Services, PLLC	Wealth Mgm't	Olympia	\$79
351	Wilkison Investment Services, LLC	Wealth Mgm't	Snoqualmie	\$10
320	Wright Wealth Management, LLC	Wealth Mgm't	Issaquah	\$18
34	Zevenbergen Capital Investments LLC	Wealth Mgm't	Seattle	\$2,737

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

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