



RAH FINANCIAL

FINANCIAL STAFFING SOLUTIONS

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

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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	BBSJ 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

363	Creative Retirement Planning, Inc.	Wealth Mgm't	Sq'm/Slvrdl/Cpev'l/Shorel'n	\$3
45	Cutler Investment Counsel, LLC	Wealth Mgm't/Mutual Funds	Seattle/AK/CA/OR	\$1,100
18	D.A. Davidson & Co.	Broker Dir/Wealth Mgm't/Trust	WA/MT/NE/CA	\$4,400
38	D'Annunzio Consulting Group, LLC	Wealth Mgm't	Tacoma	\$1,661
345	Decker Retirement Planning, Inc.	Wealth Mgm't	Kirkland/Seattle/UT	\$10
139	Demars Financial Group	Wealth Mgm't	Spokane,/Kenai, AK	\$227
175	Dental Wealth Advisors, LLC	Wealth Mgm't	Kirkland	\$144
248	Dightman Capital Group, Inc.	Wealth Mgm't	Seattle, Kansas	\$62
348	Directional Financial Services, LLC	Wealth Mgm't	Seattle	\$9
82	Duncan & Haley, LTD	Wealth Mgm't	Seattle	\$481
192	Eagle Harbor Asset Mgm't	Wealth Mgm't	Seattle	\$125
6	Edge Asset Mgm't Inc./Princ. Globe Investors	Money Mgm't/Mutual Fund Mgrs.	Seattle	\$16,900
62	Elite Wealth Management, Inc./Lattice Capital	Wealth Mgm't/Hedge Fund Mgm't	Kirkland	\$825
149	Elliott Cove Cap. Mgm't	Wealth Mgm't	Seattle	\$208
74	Emerald Advisors, LLC	Wealth Mgm't	Bellevue	\$540
30	Empirical Wealth Management	Wealth Mgm't	Seat/Blvu/Spok'n/AK/CA/OR	\$3,046
43	EP Wealth Advisors, LLC	Wealth Mgm't	Seattle/Multi-state	\$1,350
99	EQ Wealth Management	Wealth Mgm't	Mercer Island	\$369
144	Etesian Wealth Advisors, Inc.	Wealth Mgm't	Spokane/Portland	\$214
121	Evans Capital Mgm't Associates	Wealth Mgm't/Insurance	Seattle/Bellevue	\$269
23	Evergreen Capital Management, LLC	Wealth Mgm't	Bellevue	\$3,700
255	Evergreen Wealth Management Services, Inc.	Wealth Mgm't	Port Ludlow	\$58
378	Evoltycal Investments, LLC	Wealth Mgm't	Tacoma	\$1
196	Fairview Partners Investment Mgm't, LLC	Hedge Fund Mgm't	Seattle	\$115
113	Fiduciary Counselling, Inc.	Wealth Mgm't	Tacoma	\$300
5	Financial Advocates Investment Mgm't	Wealth Mgm't/Broker-Dealer/RIA	Olympia, Portland	\$23,796
199	Financial Freedom for Dentists, LLC	Wealth Mgm't	Snoqualmie	\$113
76	Financial Insights, Inc.	Wealth Mgm't	Tacoma	\$532
55	Financial Plan, Inc.	Wealth Mgm't	Bellingham	\$930
235	Financial Research, Inc.	Wealth Mgm't	Issaquah	\$70
275	FIOH Global Asset Mgm't and Strategies, LLC	Wealth Mgm't	Seattle	\$43
329	Firebrand Wealth Management, LLC	Wealth Mgm't	Seattle	\$17
282	Firewall Capital Management	Wealth Mgm't	Enumclaw	\$39
59	First Pacific Financial, Inc.	Wealth Mgm't	Vancouver	\$841
3	Fisher Investments	Wealth Mgm't	Camas	\$159,612
260	Fleckenstein Capital, Inc.	Hedge Fund Mgm't	Seattle	\$55
266	Flohr Asset Management, LLC	Wealth Mgm't/Hedge Fund	Bellevue	\$47
280	Flow Financial Planning, LLC	Wealth Mgm't	Bellingham	\$41
178	Fort Vancouver Investment Management, LLC	Wealth Mgm't	Vancouver/Portland	\$140
167	Fortis Capital Management LLC	Wealth Mgm't	Seattle	\$156
159	Fortitude Adv. Group, LLC(Sound Wlth Prtners)	Wealth Mgm't	Gig Harbor	\$191
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
273	Gallagher Capital Corp.	Wealth Mgm't	Bainbridge Island	\$43

41	Garde Capital, Inc.	Wealth Mgm't	Seattle	\$1,511
126	Garland Capital Mgm't, Inc.	Wealth Mgm't	Bellevue	\$257
287	GK Capital Partners	Wealth/Hedge Fund Mgm't	Olympia	\$36
218	Goldbloom Wealth Management, LLC	Wealth Mgm't	Bellevue	\$87
173	Gould Capital, LLC	Wealth Mgm't	Tacoma	\$147
123	Great Northern Asset Management, LLC	Wealth Mgm't	Vancouver	\$265
46	Greene Wealth Management, LLC	Wealth Mgm't	Seattle	\$1,042
194	Gregory Lyle & Company	Wealth Mgm't	Clinton	\$119
195	Griffiths, Dreher & Evans, PS, CPAs	Wealth Mgm't/Tax Services	Spokane	\$115
322	Gunn Capital Management, LLC	Wealth Mgm't	Pateros	\$20
190	Halbert Hargrove	Wealth Mgm't	Bellevue/Multi-state	\$125
120	Hamrick Investment Counsel, LLC	Wealth Mgm't	Seattle	\$276
358	Hana Road Capital, LLC	Wealth Mgm't/Hedge Fund	Seattle	\$4
267	Hancock Fielder Retirement Strategies, Inc.	Wealth Mgm't	Federal Way	\$47
100	Harbour Investment Mgm't, LLC	Wealth Mgm't	Edmonds	\$365
114	Harlow Wealth Management, Inc.	Tax Services	Vancouver	\$300
227	Hawkins Investment Counsel, LLC	Wealth Mgm't	Port Orchard	\$80
96	HBC Financial Services, PLLC	Wealth Mgm't/Tax Services	Seattle	\$398
226	Helium Advisors, LLC	Wealth Mgm't	Bellevue	\$80
169	Helm Capital Management	Wealth Mgm't/Hedge Fund	Seattle	\$154
176	Helmsman Financial Group, LLC	Wealth Mgm't, Tax/Fin. Services	Woodinville	\$143
350	Hernandez Financial	Wealth Mgm't	Sunnyside	\$9
116	Highbury Pacific Capital Corp.	Wealth Mgm't	Seattle	\$284
48	Highland Private Wealth Mgm't	Wealth Mgm't	Bellevue	\$1,022
66	Hightower Advisors, LLC (prev. Triad Wealth)	Wealth Mgm't	Bellevue	\$651
65	Hohimer Wealth Management, LLC	Wealth Mgm't	Seattle	\$682
220	Hot Creek Capital, LLC	Wealth Mgm't	Seattle	\$84
339	Howe Financial Advisory, LLC	Wealth Mgm't	Seattle	\$12
377	Ignite Financial Planning, LLC	Wealth Mgm't	Seattle	\$1
236	Informed Investors Group	Wealth Mgm't/Socially Resp. Inv.	Seattle	\$69
102	Integrity Financial Corp.	Wealth Mgm't/Consulting Svcs.	Bellevue/CA/FLA/OR	\$361
204	Integrity Wealth Management, Inc.	Wealth Mgm't	Spokane	\$105
320	Interfund Management Services, Inc.	Wealth Mgm't	Roslyn	\$20
161	Investor FAN	Wealth Mgm't	Snoqualmie	\$174
246	Investor Resources, Inc.	Wealth Mgm't	Bellevue/Port Orchard	\$62
181	Investors Portfolio Services, LLC	Wealth Mgm't	Puyallup	\$138
299	Ironstream Capital, LLC	Wealth Mgm't	Seattle	\$29
93	James R. Martin Consulting, Inc.	Wealth Mgm't/Consulting Svcs.	Vancouver	\$429
371	Janice Penar	Wealth Mgm't/Tax Services	Spokane	\$2
326	Janis Financial, LLC	Wealth Mgm't	Bainbridge Island	\$18
154	Jarvis Financial	Wealth Mgm't	Federal Way	\$196
187	John T. McCarthy, LLC	Wealth Mgm't	Spokane	\$133
213	Johnson & Shute Investment Advisors, Inc.	Wealth Mgm't/Tax Services	Bellevue	\$97
293	Julie A. Wurst, CFP, LLC	Wealth Mgm't	Tacoma	\$31
338	K.L. Baird Asset Mgm't	Wealth Mgm't	Bothell	\$12
230	Kairos Capital Management, LLC	Wealth Mgm't	Bellevue	\$79
150	Kaizen Financial Advisors, LLC	Wealth Mgm't	Kirkland	\$202

330	Kamada Investment Management	Wealth Mgm't	Bellevue	\$16
231	Karel Capital, Inc.	Wealth Mgm't	Spokane	\$72
168	Kaufman Kampe Advisors	Wealth Mgm't	Mercer Island	\$155
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/Multiple Offices	\$50,328
372	Moe Investment Management, LLC	Wealth Mgm't	Spokane	\$2
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

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 Advisors, 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

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-Dir	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	Thornwood 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