



RAH FINANCIAL

FINANCIAL STAFFING SOLUTIONS

2022 Washington State Money Managers Ranking List (by AUM)

Total AUM: \$1,098,533,000,000 (updated 01/23/23)

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 23, 2023

| Rank | Manager | Manager Type | City | Assets |
|------|--|-----------------------------------|----------------------------|---------|
| 221 | Abraham & Co., Inc. | Wealth Mgm't | Gig Harbor | \$82 |
| 48 | Acuitas Investments, LLC | Money Management/Mutual Funds | Seattle | \$1,040 |
| 296 | Adair Wealth Management | Wealth Mgm't | Bellevue | \$31 |
| 209 | Adams Financial Concepts, LLC | Wealth Mgm't | Seattle | \$100 |
| 152 | Agate Pass Investment, LLC | Wealth Mgm't | Bainbridge Island | \$210 |
| 167 | Aletheian Wealth Advisors, LLC | Wealth Mgm't | Bellevue | \$163 |
| 172 | Alliant Securities, Inc. | Wealth Mgm't | Liberty Lake/Spokane | \$158 |
| 310 | American Northwest Advisory Svcs, LLC | Wealth Mgm't/Pension & Profit Sh. | Federal Way | \$22 |
| 70 | Archon Capital Mgm't, LLC | Hedge Fund Mgm't | Seattle | \$601 |
| 319 | Ariston Capital Mgm't Corp. | Money Mgm't/Mutual Fund Spec. | Bellevue | \$19 |
| 119 | ASI Wealth Management | Wealth Mgm't | Seattle & 3 Oregon Offices | \$278 |
| 71 | Aspire Capital Advisors, LLC | Wealth Mgm't | Seattle | \$594 |
| 273 | Asymmetric Advantage Capital Mgm't, LLC | Wealth Mgm't | Bellevue | \$44 |
| 49 | Auxano Advisors, LLC | Wealth Mgm't | Kirkland | \$1,030 |
| 65 | Avier Wealth Advisors | Wealth Mgm't | Bellevue/Lake Oswego,OR | \$671 |
| 133 | Aviso Wealth Management | Wealth Mgm't | Seattle/PA/ME/MD | \$242 |
| 98 | B3 Wealth Strategies | Wealth Mgm't | Bellevue | \$395 |
| 115 | BAC Capital Advisors, LLC | Wealth Mgm't/Pension & Profit Sh. | Seattle | \$288 |
| 16 | Badgley Phelps Wealth Managers | Wealth Mgm't | Seattle | \$4,769 |
| 23 | Baird Investment Group/Robert W. Baird & Co. | Broker Dealer, Investm't Advisor | Seattle/Yakima/Mt. Vernon | \$3,553 |
| 355 | Banner Investment Consultants | Wealth Mgm't | Anacortes | \$2 |
| 32 | Barwick & Partners, Inc. | Wealth Mgm't | Seattle | \$2,535 |
| 116 | BBJS Financial Advisors, LLC | Wealth Mgm't | Seattle | \$284 |

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|-----|---|-----------------------------------|-----------------------------|----------|
| 269 | BBM Financial Services, Inc. | Wealth Mgm't/Pension & Profit Sh. | Yakima | \$48 |
| 117 | Bear Mountain Capital | Wealth Mgm't | Seattle | \$281 |
| 106 | Bellevue Asset Mgm't, LLC | Wealth Mgm't | Bellevue | \$324 |
| 198 | Bellingham Capital | Wealth Mgm't | Bellingham/Anacortes | \$115 |
| 52 | Benchmark Plus Management, LLC | Wealth/Hedge Fund Mgm't | Tacoma/New Jersey | \$984 |
| 162 | BHJ Wealth Advisors | Wealth Mgm't | Gig Harbor | \$174 |
| 326 | Blackcrane Capital | Wealth/Hedge Fund Mgm't | Bellevue | \$15 |
| 266 | Blue Water Wealth, Inc. | Wealth Mgm't | Seattle, Portland | \$50 |
| 129 | Bogdanovich Wealth Management, PLLC | Wealth Mgm't | Edmonds | \$257 |
| 128 | Boone Wealth Advisors, LLC | Wealth Mgm't | Bellevue | \$257 |
| 42 | Bordeaux Wealth Advisors | Wealth Mgm't | Bellevue | \$1,320 |
| 333 | BR Capital, Inc. | Wealth Mgm't | Camas | \$11 |
| 228 | Brackenwood Capital Management | Wealth Mgm't | Bainbridge Island | \$77 |
| 144 | Breakwater Investment Management | Wealth Mgm't | Seattle | \$227 |
| 7 | Brighton Jones, LLC | Wealth Mgm't | Seattle/SF/AZ/DC/OR | \$10,051 |
| 36 | Bristlecone Advisors, LLC | Wealth Mgm't | Bellevue | \$1,805 |
| 196 | Buckley Investment Group, LLC | Wealth Mgm't | Walla Walla | \$115 |
| 203 | Byrne & Company Wealth Management | Wealth Mgm't | Olympia | \$106 |
| 206 | Cadence Wealth Management | Wealth Mgm't | Seattle | \$102 |
| 110 | Canterbury Consulting, Inc. | Wealth Mgm't | Seattle/CA | \$300 |
| 241 | Capital Investment Services, LLC | Wealth Mgm't/Tax Services | Lynnwood | \$67 |
| 73 | Capital Planning, LLC | Wealth Mgm't | Bellevue | \$571 |
| 292 | Cedar River Capital, LLC | Wealth Mgm't | Seattle | \$33 |
| 113 | Chaney Capital Mgm't | Wealth Mgm't | Lynnwood | \$295 |
| 341 | Chernofsky Financial, LLC | Wealth Mgm't | Vancouver | \$5 |
| 135 | Christensen, King & Assoc. Investment Svcs. | Wealth Mgm't | Richland | \$239 |
| 329 | CIM Financial Group, Inc. | Wealth Mgm't | Lynnwood | \$12 |
| 229 | Clear Wealth Management | Wealth Mgm't | Lynnwood/NY | \$76 |
| 317 | Clearbrook Investment Management | Wealth Mgm't | Bellingham | \$20 |
| 331 | Coast Capital Management, LLC | Wealth Mgm't/Pension & Profit Sh. | Bainbridge Island | \$12 |
| 11 | Coldstream Wealth Management | Wealth Mgm't | Bellevue/Seattle | \$7,219 |
| 146 | Columbia Advisory Partners, LLC | Wealth Mgm't | Spokane | \$222 |
| 40 | Columbia Pacific Advisors, LLC | Wealth/Hedge Fund Mgm't | Seattle | \$1,351 |
| 80 | Columbia River Advisors, LLC | Wealth Mgm't | Tacoma | \$496 |
| 338 | Columbia Strategic Wealth Advisors, LLC | Wealth Mgm't | Seattle | \$10 |
| 258 | Commencement Financial Planning, LLC | Wealth Mgm't | Tacoma | \$55 |
| 353 | Commodore Asset Management, LLC | Wealth Mgm't | Tacoma | \$2 |
| 297 | Companion Portfolio Management | Wealth Mgm't | Sequim | \$30 |
| 105 | Comprehensive Wealth Mgm't | Wealth Mgm't | Lynnwood | \$329 |
| 360 | Comus Investment, LLC | Wealth Mgm't | Olympia | \$1 |
| 136 | Conover Capital Management, LLC | Wealth Mgm't | Bellevue | \$237 |
| 91 | Conway Jarvis & Associates, LLC | Wealth Mgm't | Seattle | \$443 |
| 351 | Core Capital Advisors, LLC | Wealth Mgm't | Olympia | \$3 |
| 293 | Crafted Finance, LLC | Wealth Mgm't | Seattle | \$33 |
| 350 | Creative Retirement Planning, Inc. | Wealth Mgm't | Sq'm/Slvrdl/Cpev'l/Shorel'n | \$3 |
| 53 | Cutler Investment Counsel, LLC | Wealth Mgm't/Mutual Funds | Seattle/AK/CA/OR | \$971 |
| 18 | D.A. Davidson & Co. | Broker Dlr/Wealth Mgm't/Trust | WA/MT/NE/CA | \$4,400 |

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|-----|---|--------------------------------|---------------------------|------------------|
| 35 | D'Annunzio Consulting Group, LLC | Wealth Mgm't | Tacoma | \$1,833 |
| 336 | Decker Retirement Planning, Inc. | Wealth Mgm't | Kirkland/Seattle/UT | \$10 |
| 120 | Demars Financial Group | Wealth Mgm't | Spokane./Kenai, AK | \$276 |
| 252 | Dightman Capital Group, Inc. | Wealth Mgm't | Seattle, Kansas | \$59 |
| 340 | Directional Financial Services, LLC | Wealth Mgm't | Seattle | \$8 |
| 72 | Duncan & Haley, LTD | Wealth Mgm't | Seattle | \$592 |
| 193 | Eagle Harbor Asset Mgm't | Wealth Mgm't | Seattle | \$119 |
| 59 | Elite Wealth Management, Inc./Lattice Capital | Wealth Mgm't/Hedge Fund Mgm't | Kirkland | \$842 |
| 127 | Elliott Cove Cap. Mgm't | Wealth Mgm't | Seattle | \$258 |
| 76 | Emerald Advisors, LLC | Wealth Mgm't | Bellevue | \$537 |
| 19 | Empirical Wealth Management | Wealth Mgm't | Seat/Blvu/Spok'n/AK/CA/OR | \$4,167 |
| 41 | EP Wealth Advisors, LLC | Wealth Mgm't | Seattle/Multi-state | \$1,350 |
| 84 | EQ Wealth Management | Wealth Mgm't | Mercer Island | \$487 |
| 149 | Etesian Wealth Advisors, Inc. | Wealth Mgm't | Spokane/Portland | \$214 |
| 130 | Evans Capital Mgm't Associates | Wealth Mgm't/Insurance | Seattle/Bellevue | \$254 |
| 20 | Evergreen Capital Management, LLC | Wealth Mgm't | Bellevue/OR/CA/S.F. | \$3,935 |
| 242 | Evergreen Wealth Management Services, Inc. | Wealth Mgm't | Port Ludlow | \$67 |
| 328 | Evolytical Investments, LLC | Wealth Mgm't | Tacoma | \$13 |
| 182 | Fairview Partners Investment Mgm't, LLC | Hedge Fund Mgm't | Seattle | \$135 |
| 111 | Fiduciary Counselling, Inc. | Wealth Mgm't | Tacoma | \$300 |
| 5 | Financial Advocates Investment Mgm't | Wealth Mgm't/Broker-Dealer/RIA | Olympia, Portland | \$18,584 |
| 195 | Financial Freedom for Dentists, LLC | Wealth Mgm't | Snoqualmie | \$116 |
| 68 | Financial Insights, Inc. | Wealth Mgm't | Tacoma | \$620 |
| 56 | Financial Plan, Inc. | Wealth Mgm't | Bellingham | \$931 |
| 227 | Financial Research, Inc. | Wealth Mgm't | Issaquah | \$78 |
| 270 | FIOH Global Asset Mgm't and Strategies, LLC | Wealth Mgm't | Seattle | \$47 |
| 320 | Firebrand Wealth Management, LLC | Wealth Mgm't | Seattle | \$18 |
| 264 | Firewall Capital Management | Wealth Mgm't | Enumclaw | \$52 |
| 47 | First Pacific Financial, Inc. | Wealth Mgm't | Vancouver | \$1,048 |
| 3 | Fisher Investments | Wealth Mgm't | Camas | \$208,100 |
| 263 | Fleckenstein Capital, Inc. | Hedge Fund Mgm't | Seattle | \$52 |
| 272 | Flohr Asset Management, LLC | Wealth Mgm't/Hedge Fund | Bellevue | \$45 |
| 234 | Flow Financial Planning, LLC | Wealth Mgm't | Bellingham | \$72 |
| 170 | Fort Vancouver Investment Management, LLC | Wealth Mgm't | Vancouver/Portland | \$158 |
| 137 | Fortis Capital Management LLC | Wealth Mgm't | Seattle | \$235 |
| 102 | Fortitude Adv. Group, LLC(Sound With Prtners) | Wealth Mgm't | Gig Harbor | \$337 |
| 10 | Freestone Capital Mgm't, LLC | Wealth/Hedge Fund Mgm't | Seattle | \$8,929 |
| 63 | FRG Family Wealth Advisors | Wealth Mgm't | Bellevue/AZ/CA/TX | \$685 |
| 288 | FSR Wealth Management, LLC | Wealth Mgm't | Bellingham | \$34 |
| 61 | Fulcrum Capital, LLC | Wealth Mgm't | Seattle | \$759 |
| 232 | Fulcrum Wealth Advisors, LLC | Wealth Mgm't | Bellevue | \$73 |
| 276 | Gallagher Capital Corp. | Wealth Mgm't | Bainbridge Island | \$42 |
| 39 | Garde Capital, Inc. | Wealth Mgm't | Seattle | \$1,515 |
| 138 | Garland Capital Mgm't, Inc. | Wealth Mgm't | Bellevue | \$235 |
| 278 | GK Capital Partners | Wealth/Hedge Fund Mgm't | Olympia | \$39 |
| 208 | Goldbloom Wealth Management, LLC | Wealth Mgm't | Bellevue | \$101 |
| 169 | Gould Capital, LLC | Wealth Mgm't | Tacoma | \$159 |

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|-----|---|----------------------------------|-----------------------|---------|
| 122 | Great Northern Asset Management, LLC | Wealth Mgm't | Vancouver | \$273 |
| 46 | Greene Wealth Management, LLC | Wealth Mgm't | Seattle | \$1,173 |
| 177 | Gregory Lyle & Company | Wealth Mgm't | Clinton | \$147 |
| 179 | Griffiths, Dreher & Evans, PS, CPAs | Wealth Mgm't/Tax Services | Spokane | \$140 |
| 303 | Gunn Capital Management, LLC | Wealth Mgm't | Pateros | \$25 |
| 186 | Halbert Hargrove | Wealth Mgm't | Bellevue/Multi-state | \$125 |
| 121 | Hamrick Investment Counsel, LLC | Wealth Mgm't | Seattle | \$274 |
| 344 | Hana Road Capital, LLC | Wealth Mgm't/Hedge Fund | Seattle | \$4 |
| 259 | Hancock Fielder Retirement Strategies, Inc. | Wealth Mgm't | Federal Way | \$55 |
| 300 | Hara Capital, LLC | Wealth Mgm't | Bellevue | \$28 |
| 96 | Harbour Investment Mgm't, LLC | Wealth Mgm't | Edmonds | \$407 |
| 109 | Harlow Wealth Management, Inc. | Tax Services | Vancouver | \$302 |
| 224 | Hawkins Investment Counsel, LLC | Wealth Mgm't | Port Orchard | \$80 |
| 86 | HBC Financial Services, PLLC | Wealth Mgm't/Tax Services | Seattle | \$468 |
| 205 | Helium Advisors, LLC | Wealth Mgm't | Everett | \$105 |
| 173 | Helm Capital Management | Wealth Mgm't/Hedge Fund | Seattle | \$157 |
| 166 | Helmsman Financial Group, LLC | Wealth Mgm't, Tax/Fin. Services | Woodinville | \$164 |
| 332 | Hernandez Financial | Wealth Mgm't | Sunnyside | \$12 |
| 112 | Highbury Pacific Capital Corp. | Wealth Mgm't | Seattle | \$300 |
| 50 | Hightower Advisors, LLC/Highland Private WM | Wealth Mgm't | Bellevue | \$1,000 |
| 55 | Hohimer Wealth Management, LLC | Wealth Mgm't | Seattle | \$938 |
| 192 | Hot Creek Capital, LLC | Wealth Mgm't | Seattle | \$120 |
| 330 | Howe Financial Advisory, LLC | Wealth Mgm't | Seattle | \$12 |
| 311 | Ignite Financial Planning, LLC | Wealth Mgm't | Seattle | \$22 |
| 222 | Informed Investors Group | Wealth Mgm't/Socially Resp. Inv. | Seattle | \$81 |
| 74 | Integrity Financial Corp. | Wealth Mgm't/Consulting Svcs. | Bellevue/CA/FLA/OR | \$553 |
| 187 | Integrity Wealth Management, Inc. | Wealth Mgm't | Spokane | \$124 |
| 315 | Interfund Management Services, Inc. | Wealth Mgm't | Roslyn | \$20 |
| 141 | Investor FAN | Wealth Mgm't | Snoqualmie | \$229 |
| 246 | Investor Resources, Inc. | Wealth Mgm't | Bellevue/Port Orchard | \$63 |
| 185 | Investors Portfolio Services, LLC | Wealth Mgm't | Puyallup | \$125 |
| 275 | Ironstream Capital, LLC | Wealth Mgm't | Seattle | \$43 |
| 83 | James R. Martin Consulting, Inc. | Wealth Mgm't/Consulting Svcs. | Vancouver | \$488 |
| 356 | Janice Penar | Wealth Mgm't/Tax Services | Spokane | \$2 |
| 313 | Janis Financial, LLC | Wealth Mgm't | Bainbridge Island | \$21 |
| 145 | Jarvis Financial | Wealth Mgm't | Federal Way | \$227 |
| 181 | John T. McCarthy, LLC | Wealth Mgm't | Spokane | \$137 |
| 197 | Johnson & Shute Investment Advisors, Inc. | Wealth Mgm't/Tax Services | Bellevue | \$115 |
| 287 | Julie A. Wurst, CFP, LLC | Wealth Mgm't | Tacoma | \$34 |
| 327 | K.L. Baird Asset Mgm't | Wealth Mgm't | Bothell | \$15 |
| 217 | Kairos Capital Management, LLC | Wealth Mgm't | Bellevue | \$94 |
| 143 | Kaizen Financial Advisors, LLC | Wealth Mgm't | Kirkland | \$228 |
| 321 | Kamada Investment Management | Wealth Mgm't | Bellevue | \$18 |
| 220 | Karel Capital, Inc. | Wealth Mgm't | Spokane | \$86 |
| 280 | Kelp Capital, LLC | Wealth Mgm't | Seattle | \$38 |
| 44 | Kiley Juergens Wealth Management, LLC | Wealth Mgm't | Olympia | \$1,269 |
| 43 | Kosmos Management, LLC | Wealth/Hedge Fund Mgm't | Seattle | \$1,286 |

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|-----|--|----------------------------------|----------------------------|----------|
| 31 | Kunath Karren Rinne & Atkin, LLC | Wealth Mgm't | Seattle | \$2,763 |
| 79 | Kutscher Benner Barsness & Stevens, Inc. | Wealth Mgm't | Seattle | \$518 |
| 14 | Laird Norton W'lth Mgm't(Strat./Trust Co, LLC) | Wealth Mgm't/Trust Mgm't | Seattle | \$4,869 |
| 100 | Lakeside Advisors, Inc. | Wealth Mgm't | Seattle | \$380 |
| 285 | Latticework Capital | Wealth Mgm't/Hedge Fund | Sammamish | \$35 |
| 159 | Leeward Financial Partners, LLC | Wealth Mgm't | Seattle | \$188 |
| 64 | Leonard Rickey Investment Advisors, PLLC | Wealth Mgm't | Richland/Seattle/Yakima | \$684 |
| 161 | Lesa Sroufe & Company, Inc. | Wealth Mgm't | Seattle | \$176 |
| 339 | Leverage Planners Wealth Management, LLC | Wealth Mgm't | Bellevue | \$10 |
| 253 | Lifefocus Financial Advisors, LLC | Wealth Mgm't/Tax Services | Walla Walla | \$59 |
| 324 | Lin Capital Management, LLC | Wealth/Hedge Fund Mgm't | Bellevue | \$16 |
| 151 | Lincoln Invstment Plng (IA'sTremper & Roper) | Wealth Mgm't | Renton | \$212 |
| 139 | Lodestone Wealth Management, LLC | Wealth Mgm't | Spokane | \$230 |
| 279 | Long Term Investors, LLC | Wealth Mgm't | Wenatchee | \$39 |
| 60 | Lucid Advisors, Inc. | Wealth Mgm't | Seattle | \$814 |
| 306 | Ludeman Capital Management, Inc. | Wealth Mgm't | Ferndale | \$23 |
| 132 | Madison Park Capital Advisors, LLC | Wealth Mgm't | Seattle | \$249 |
| 75 | Madrona Financial Services, LLC | Wealth Mgm't | Everett/Blvue/Tacoma | \$550 |
| 191 | Mangan Wealth Management | Wealth Mgm't | Seattle | \$120 |
| 90 | Marshall & Sullivan, Inc. | Wealth Mgm't | Seattle | \$447 |
| 69 | MarsJewett Financial Group | Wealth Mgm't | Bellevue | \$605 |
| 202 | Martin Nelson & Co., Inc. | Wealth Mgm't | Seattle | \$108 |
| 314 | McBee Advisors, Inc. | Wealth Mgm't | Bellevue, Glendale AZ | \$20 |
| 174 | McBride Financial Advisors, LLC | Wealth Mgm't | Seattle | \$151 |
| 21 | McCutchen Group, LLC | Wealth Mgm't | Seattle | \$3,909 |
| 67 | McIlrath and Eck, LLC | Wealth Mgm't | Arlington | \$645 |
| 231 | MCM Advisory, LLC | Wealth Mgm't | Richland | \$73 |
| 308 | Mellor & Associates, LLC | Wealth Mgm't | Bellevue | \$22 |
| 235 | Mercer Asset Mgm't, Inc. | Wealth Mgm't | Bainbridge Island | \$70 |
| 309 | Meridan Capital, LLC | Wealth/Hedge Fund Mgm't | Bellevue | \$22 |
| 243 | Meridian Wealth Management, LLC | Wealth Mgm't | Bellevue | \$67 |
| 22 | Merriman | Wealth Mgm't | Blvue/S'ttle/Spok./Eugene | \$3,694 |
| 213 | Middleton & Company | Wealth Mgm't | Vancouver | \$98 |
| 4 | Milliman Advisors, LLC | Wealth Mgm't/Pension Consultants | Seattle/Multiple Offices | \$39,000 |
| 357 | Moe Investment Management, LLC | Wealth Mgm't | Spokane | \$2 |
| 200 | Monson Wealth Management, Inc. | Wealth Mgm't | Kennewick | \$110 |
| 211 | Moore Wealth Management, LLC | Wealth Mgm't | Renton | \$99 |
| 140 | Moser Wealth Advisors, LLC | Wealth Mgm't/Tax Services | Bellevue | \$229 |
| 30 | Moss Adams Wealth Advisors | Wealth Mgm't | Seattle/Everett/Tac/Yakima | \$2,781 |
| 89 | Mountain Pacific Advisors, LLC | Hedge Fund/Pens./Profit-Sharing | Bellevue | \$456 |
| 153 | My Personal CFO | Wealth Mgm't | Vancouver | \$210 |
| 184 | Newground Social Investment | Wealth Mgm't | Seattle | \$128 |
| 178 | Nierenberg Investment Mgm't Company, Inc. | Wealth/Hedge Fund Mgm't | Camas | \$145 |
| 99 | Northern Capital Management, Inc. | Wealth Mgm't | Spokane | \$388 |
| 245 | Northern Lights Advisors, Inc. | Wealth Mgm't | Seattle | \$65 |
| 92 | Northwest Administrators, Inc. | Pension/Trust Administration | Seattle | \$431 |
| 27 | Northwest Asset Management | Wealth Mgm't | Mercer Island | \$3,256 |

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|-----|---|----------------------------------|-------------------------|----------------|
| 154 | Northwest Capital Management, Inc. | Wealth Mgm't | Portland/Bellevue | \$202 |
| 265 | Northwest Financial Choices | Wealth Mgm't/Tax Planning | Renton | \$51 |
| 322 | Northwest Investment Advisors, Inc. | Broker Dealer, Investm't Advisor | Spokane | \$18 |
| 219 | NR Smith & Associates, P.S. | Wealth Mgm't/Tax Services | Olympia | \$86 |
| 348 | NUKU Asset, Inc. | Wealth Mgm't | Bainbridge Island | \$3 |
| 312 | NWT Advisors, LLC | Wealth Mgm't/Tax Services | Duvall | \$21 |
| 66 | Oak Harbor Capital, LLC | Wealth/Hedge Fund Mgm't | Seattle | \$670 |
| 103 | Oliver Capital Mgm't, Inc. | Wealth Mgm't | Seattle | \$335 |
| 175 | Olson Investment Advisors, LLC | Wealth Mgm't | Seattle | \$150 |
| 158 | Olympic Wealth Management, LLC | Wealth Mgm't | Bothell | \$189 |
| 230 | Omega Financial Investment & Insurance | Financial Planning/Insurance | Kirkland | \$75 |
| 255 | Opal Advisors | Wealth Mgm't/Hedge Fund Mgm't | Bellevue | \$58 |
| 28 | Oppenheimer & Co., Inc. | Wealth Mgm't | Seattle/Multi-Office | \$3,235 |
| 168 | Optimist Retirement, LLC | Wealth Mgm't | Bellevue/Scottsdale AZ | \$161 |
| 134 | Pacific Asset Mgm't, LLC | Wealth Mgm't | Gig Harbor/Shelton | \$240 |
| 251 | Pacific Crest Financial Advisors, LLC | Wealth Mgm't/Inv. Advisors | Everett/Seattle | \$59 |
| 93 | Pacific Current Group | Hedge Fund Mgm't | Seattle/Tacoma | \$418 |
| 212 | Pacific Financial Advisors, Inc. | Wealth Mgm't | Bellevue | \$99 |
| 262 | Pacific Horizon Investment Management, LLC | Wealth Mgm't | Seattle | \$53 |
| 17 | Pacific Portfolio Consulting, LLC | Wealth Mgm't | Seattle | \$4,532 |
| 125 | Palouse Capital Mgm't, Inc. (prev.Ken Roberts) | Wealth Mgm't | Spokane | \$264 |
| 1 | Parametric Portfolio Associates | Money Mgm't/Mutual Fund Spec. | Seattle | \$366,000 |
| 34 | Parcion Private Wealth, LLC | Wealth Mgm't | Bellevue | \$2,114 |
| 188 | Parker Financial, LLC | Wealth Mgm't | Silverdale | \$122 |
| 15 | Pathstone (Pacific Northwest Region-Only) | Multi-Family Office | Blvue/Seattle/Anchorage | \$4,850 |
| 54 | Paul R. Ried Financial Group, LLC | Wealth Mgm't | Bellevue | \$969 |
| 250 | Paysse Jennison, Inc. | Wealth Mgm't | Mercer Island | \$61 |
| 337 | Pegasus Investment Mgm't, LLC | Wealth/Hedge Fund Mgm't | Bainbridge Island | \$10 |
| 238 | Pengra Capital Mgm't, Inc. | Wealth Mgm't/Hedge Fund | Seattle | \$67 |
| 305 | Percension Wealth Advisors, LLC | Wealth Mgm't | Seattle | \$23 |
| 77 | Personal Investment Mgm't, Inc. | Wealth Mgm't | Redmond | \$534 |
| 57 | Petersen Hastings Investment Mgm't, Inc. | Wealth Mgm't | Kennewick | \$930 |
| 225 | Peterson Investment Mgm't, Inc. | Wealth Mgm't | Spokane | \$80 |
| 354 | Pi Square Capital, LLC | Wealth Mgm't | Bellevue | \$2 |
| 267 | PLM Investment Advisors, Inc. | Wealth Mgm't | Spokane | \$49 |
| 247 | PNW Asset Management | Wealth Mgm't | Seattle | \$63 |
| 289 | Polaris Asset Mgm't, LLC | Wealth Mgm't | Seattle | \$34 |
| 216 | Portfolio Strategies, Inc. | Wealth Mgm't | Tacoma | \$94 |
| 240 | Prentice Financial Planning, LLC | Wealth Mgm't | Olympia | \$67 |
| 343 | Presidio Financial Group, Inc. | Wealth Mgm't | Sammamish | \$5 |
| 183 | Prevail Wealth Management | Wealth Mgm't | Kirkland | \$128 |
| 298 | Prism Capital Management | Wealth Mgm't | Seattle | \$29 |
| 62 | Private Advisory Group | Wealth Mgm't | Redmond | \$687 |
| 164 | Private Asset Mgm't, Inc. | Wealth Mgm't | Kirkland | \$169 |
| 97 | Private Income Capital Management | Wealth Mgm't | Seattle | \$404 |
| 277 | Private Wealth Management Solutions, LLC | Wealth Mgm't | Bellevue | \$40 |
| 226 | Professional Investment Management Services, PI | Wealth Mgm't | Kennewick | \$78 |

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|-----|--|------------------------------------|-----------------------|-----------|
| 291 | Promenade Wealth, LLC | Wealth Mgm't | Bellevue | \$34 |
| 325 | Prospero Wealth, LLC | Wealth Mgm't | Seattle | \$16 |
| 6 | Pugh Capital Mgm't, Inc. | Institutional Fixed Inc. Money Mgr | Seattle | \$11,662 |
| 318 | R&R Retirement Services, Inc. | Wealth Mgm't | Seattle | \$19 |
| 218 | R. Brian Howell & Associates, Inc. | Wealth Mgm't | Tacoma | \$88 |
| 236 | Ragnar Wealth Management, LLC | Wealth Mgm't | Tumwater/Bellingham | \$69 |
| 260 | Rainier Wealth Management, LLC | Wealth Mgm't | Mukilteo | \$53 |
| 249 | Renaissance Wealth Counsel, LLC | Wealth Mgm't/Tax Services | Bellevue | \$62 |
| 114 | Richards, Merrill & Peterson, Inc. | Wealth Mgm't | Spokane | \$289 |
| 94 | Robinswood Financial, LLC | Wealth Mgm't | Kirkland | \$413 |
| 157 | Runde & Co., LLC | Wealth Mgm't | Seattle | \$193 |
| 2 | Russell Investment Group | Money Management | Seattle | \$245,000 |
| 147 | S.R. Schill & Assoc., Inc. | Wealth Mgm't | Mercer Island | \$215 |
| 239 | Sabin Investment Management, Inc. | Wealth Mgm't | Gig Harbor | \$67 |
| 358 | Salmon Bay Wealth Management, LLC | Wealth Mgm't | Seattle | \$2 |
| 131 | Sander Capital Advisors | Wealth Mgm't | Seattle | \$250 |
| 261 | Sapling Wealth Management | Wealth Mgm't | Seattle | \$53 |
| 148 | Sapphire Star Capital, LLC | Wealth/Hedge Fund Mgm't | Kirkland | \$215 |
| 290 | Satori Financial, LLC | Wealth Mgm't | Seattle | \$34 |
| 12 | Saturna Capital Corporation | Money Mgm't/Mut'l Fnd Spec/B-Dir | Bellingham | \$6,146 |
| 85 | Schmidt Financial Group, Inc. | Wealth Mgm't | Kirkland/Mtn View, CA | \$482 |
| 316 | Seattle Asset Mgm't, Inc. | Wealth Mgm't | Bainbridge Island | \$20 |
| 199 | Seattle Wealth Management, LLC | Wealth/Hedge Fund Mgm't | Seattle | \$110 |
| 204 | Selkirk Wealth Advisors, LLC | Wealth Mgm't | Spokane | \$105 |
| 142 | Seneschal Advisors, LLC | Wealth Mgm't | Tacoma | \$228 |
| 223 | Sherwood Investments | Wealth Mgm't | Redmond | \$81 |
| 334 | Signal Financial Planning, LLC | Wealth Mgm't | Issaquah | \$11 |
| 214 | Signia Capital Management, LLC | Institutional Money Mgm't/Value | Spokane | \$97 |
| 108 | Silver Creek Capital Mgm't, LLC | Hedge Fund Mgm't | Seattle | \$313 |
| 257 | Simple Wealth, LLC | Wealth Mgm't | Spokane | \$55 |
| 307 | Singer Wealth Management | Wealth Mgm't | Seattle | \$23 |
| 335 | Sitka Pacific Capital Management, LLC | Wealth Mgm't | Edmonds | \$10 |
| 124 | Skyline Advisors, Inc. | Wealth Mgm't | Bellingham | \$265 |
| 150 | Smart Portfolios, LLC | Wealth Mgm't | Lake Forest Park | \$214 |
| 118 | Snider Financial Group | Wealth Mgm't | Bellevue | \$280 |
| 104 | Sonata Capital Group, Inc. | Wealth Mgm't | Seattle | \$329 |
| 295 | Sound Financial Center | Wealth Mgm't | Sequim | \$32 |
| 323 | Sound Financial Investments, Inc. | Wealth Mgm't | Tacoma | \$18 |
| 282 | Sound Investment Strategies, Inc. | Wealth Mgm't | Bothell | \$37 |
| 233 | Sound Legacy Wealth Advisors, LLC | Wealth Mgm't | Bellevue | \$73 |
| 95 | Soundmark Wealth Management, LLC | Wealth Mgm't | Kirkland | \$412 |
| 107 | Soundview Advisors | Wealth Mgm't | Seattle/Olympia | \$314 |
| 101 | Sovereign Wealth Advisors, Inc. | Wealth Mgm't | Bellevue | \$339 |
| 190 | Stapp Wealth Management, PLLC | Wealth Mgm't/Tax Services | Olympia | \$120 |
| 33 | Steelhead Partners, LLC | Hedge Fund Mgm't | Seattle | \$2,434 |
| 284 | Steward Capital, LLC | Wealth Mgm't | Bellevue | \$37 |
| 237 | Stewardship Concepts Financial Services, LLC | Wealth Mgm't | Spokane | \$68 |

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| 207 | Stock Mgm't, LLC | Wealth Mgm't | Puyallup | \$102 |
| 163 | Stolz & Associates, PS | Wealth Mgm't | Tacoma | \$170 |
| 286 | Stonebridge Capital Management NW, LLC | Wealth Mgm't | Gig Harbor | \$35 |
| 346 | Strategic Asset Management | Wealth Mgm't | Tacoma | \$4 |
| 38 | Strategic Income Management, LLC | Money Mgm't/Mutual Fund Mgrs. | Seattle | \$1,766 |
| 347 | Summit Family Office Services, LLC | Wealth Mgm't | Bellevue | \$4 |
| 352 | Synergos Advisory | Wealth Mgm't | Seattle | \$3 |
| 82 | Synergy Asset Mgm't, LLC | Wealth Mgm't | Bellevue | \$489 |
| 274 | Tacoma Investment Group | Wealth Mgm't | Tacoma | \$44 |
| 29 | Taiyo Pacific Partners L.P. | Hedge Fund Mgm't | Kirkland | \$2,852 |
| 78 | Talbot Financial, LLC | Wealth Mgm't | Bellevue | \$523 |
| 58 | Ten Capital Investment Advisors, LLC | Wealth Mgm't | Spokane | \$860 |
| 248 | Tenere, LLC | Wealth Mgm't | Issaquah | \$62 |
| 189 | TFS Advisors, LLC | Wealth Mgm't | Edmonds | \$122 |
| 256 | The Boyle Group Wealth Management | Wealth Mgm't | Seattle | \$57 |
| 37 | The Caprock Group, Inc. | Wealth Mgm't | Mercer Island/Idaho/Calif. | \$1,800 |
| 24 | The Clarius Group, LLC | Wealth Mgm't | Bellevue | \$3,444 |
| 26 | The Pacific Financial Group, Inc. | Wealth Mgm't | Bellevue | \$3,272 |
| 176 | The Planner's Edge, LLC | Wealth Mgm't | Mercer Island | \$148 |
| 87 | The Retirement Solution, Inc. | Wealth Mgm't | Redmond | \$466 |
| 244 | Therese Govern Financial Advisors, LLC | Wealth Mgm't | Seattle | \$66 |
| 281 | Thome Financial | Wealth Mgm't | Bellevue | \$38 |
| 25 | Tiedemann Advisors, LLC | Wealth Mgm't/Family Office Svcs. | Seattle/NY/Multi-state | \$3,347 |
| 156 | Tieton Capital Management, LLC | Money Manager, Small Cap. Val. | Yakima | \$200 |
| 271 | Timepiece Financial Planning, Inc. | Wealth Mgm't | Vancouver | \$46 |
| 349 | Tracker Research, LLC | Wealth/Hedge Fund Mgm't | Seattle | \$3 |
| 81 | Tradewinds Capital Management, LLC | Wealth Mgm't | Bellingham/Shoreline | \$493 |
| 294 | Trail Financial Planning, LLC | Wealth Mgm't | Bellingham | \$32 |
| 88 | Trellis Advisors, LLC | Wealth Mgm't | Seattle/Ellensburg | \$462 |
| 155 | TrueNorth Wealth Advisors | Wealth Mgm't | Seattle | \$202 |
| 51 | Trutina Financial | Wealth Mgm't | Bellevue | \$990 |
| 180 | Turloff Financial Consulting, Inc. | Wealth Mgm't | Bainbridge Island | \$138 |
| 123 | Unionview Wealth Partners | Wealth Mgm't | Seattle | \$268 |
| 342 | Unleashed Financial, LLC | Wealth Mgm't | Kirkland | \$5 |
| 345 | Vail Ridge Capital, LLC | Wealth Mgm't | Bellingham | \$4 |
| 8 | Verus Advisory, Inc.(prev. Wurts & Assoc.) | Wealth Mgm't/Pension & Profit Sh. | Seattle/L.A./S.F. | \$9,381 |
| 301 | Viceroy Investment Advisors LLC | Wealth Mgm't | Everett | \$26 |
| 165 | Viewpoint Capital Management | Wealth Mgm't | Seattle | \$169 |
| 283 | Vorpahl Wing Securities, Inc. | Wealth Mgm't | Spokane | \$37 |
| 268 | Waits Investments, LLC | Wealth Mgm't | Spokane | \$49 |
| 9 | Washington Capital Mgm't, Inc. | Wealth Mgm't | Seattle/OR/CA/MA | \$8,950 |
| 304 | WaterHill Capital, LLC | Wealth/Hedge Fund Mgm't | Kenmore | \$24 |
| 171 | Waycross Investment Mgm't Company | Wealth Mgm't | Bellingham | \$158 |
| 126 | Wayfinding Financial, LLC | Wealth Mgm't | Lynnwood | \$261 |
| 160 | Wealth Asset Managers/Nelson Securities | Wealth Mgm't | Spokane | \$186 |
| 254 | Wealth-Builders, Inc. | Wealth Mgm't/Tax Services | Bellevue | \$59 |
| 201 | WealthCollab | Wealth Mgm't | Bellevue | \$109 |

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| 210 | Wealthmark, LLC | Wealth Mgm't | Bellingham | \$99 |
| 302 | Westface Financial Advisory | Wealth Mgm't | Vancouver | \$25 |
| 45 | WestRiver Management, LLC | Wealth/Hedge Fund Mgm't | Kirkland | \$1,247 |
| 215 | White & Company Financial Planning, Inc. | Wealth Mgm't | Sunnyside | \$95 |
| 194 | Wilhelm Financial Services, PLLC | Wealth Mgm't | Olympia | \$117 |
| 359 | Wilkison Investment Services, LLC | Wealth Mgm't | Snoqualmie | \$1 |
| 299 | Wright Wealth Management, LLC | Wealth Mgm't | Issaquah | \$28 |
| 13 | Zevenbergen Capital Investments LLC | Wealth Mgm't | Seattle | \$4,902 |