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# America's Top Financial Advisory Firms 2026

By [Jennifer H. Cunningham](#)

Editor-in-Chief



goals to keep you feeling financially secure for years to come. Whether you are a young adult looking to start saving or a soon-to-be retiree planning for your next chapter, these professionals are a resource you can rely on.

About **27 percent** of Americans utilize financial advisors to manage their money, according to YouGov. When looking for an advisory service, they seek companies that are trustworthy, have a wealth of expertise and are known for their brand reputation.

That is why *Newsweek* is proud to partner with Plant-A Insights for the second year to bring you America's Top Financial Advisory Firms 2026, highlighting 1,000 companies across the country to help you achieve your financial goals.

This ranking was built on a shortlist of firms with more than \$20 million assets under management, at least three wealth advisers, a minimum of five individual clients and at least two years of SEC registration. These companies were then evaluated on asset performance, client performance, adviser expertise and client ratio, breadth of service offerings and conflicts of interest. Firms included in this ranking are 401K Investment Professionals, Alexander Capital Wealth Management, Beacon Pointe Advisors, Custos Family Office and Seaview Investment Managers.

We hope that this ranking helps you find a firm that will help you meet your financial goals, no matter your income, stage of life or savings goals.

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AUM = Assets Under Management / CAGR = Compound Annual Growth Rate

| Star Rating | Name                                | Total AUM Range -<br>Sep 2025    | AUM CAGR over 5<br>years* | Main Office City | Main Office State |
|-------------|-------------------------------------|----------------------------------|---------------------------|------------------|-------------------|
| ★★★★★       | Covenant Wealth<br>Advisors         | \$500 Million - \$1 Billion      | 21%-30%                   | Richmond         | Virginia          |
| ★★★★★       | Range Advisory                      | up to \$250 Million              | -                         | McLean           | Virginia          |
| ★★★★½       | AMJ Financial Wealth<br>Management  | \$250 Million - \$500<br>Million | 11%-20%                   | Leesburg         | Virginia          |
| ★★★★½       | Andersen Tax                        | \$5 Billion - \$10 Billion       | 21%-30%                   | McLean           | Virginia          |
| ★★★★½       | Birks Financial                     | up to \$250 Million              | 11%-20%                   | Herndon          | Virginia          |
| ★★★★½       | Brown   Miller Wealth<br>Management | \$500 Million - \$1 Billion      | 11%-20%                   | McLean           | Virginia          |
| ★★★★½       | Chesapeake Investment<br>Management | up to \$250 Million              | 6%-10%                    | McLean           | Virginia          |



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| Star Rating | Name                              | Sep 2025                      | years*  | Main Office City | Main Office State |
|-------------|-----------------------------------|-------------------------------|---------|------------------|-------------------|
| ★★★★½       | Emergent Financial Services       | up to \$250 Million           | -       | Charlottesville  | Virginia          |
| ★★★★½       | James River Asset Management      | up to \$250 Million           | 6%-10%  | Midlothian       | Virginia          |
| ★★★★½       | OLIO Financial Planning           | \$250 Million - \$500 Million | 21%-30% | Mclean           | Virginia          |
| ★★★★½       | Pointoak Retirement Advisors      | \$500 Million - \$1 Billion   | -       | Mclean           | Virginia          |
| ★★★★½       | Solitude Financial Services       | \$250 Million - \$500 Million | 11%-20% | Charlottesville  | Virginia          |
| ★★★★½       | Taylor Hoffman Capital Management | \$250 Million - \$500 Million | -       | Richmond         | Virginia          |
| ★★★★½       | The Ascent Group                  | \$1 Billion - \$5 Billion     | -       | Virginia Beach   | Virginia          |
| ★★★★½       | The Main Street Group             | \$250 Million - \$500 Million | 21%-30% | Glen Allen       | Virginia          |
| ★★★★        | 4J Wealth Management              | \$250 Million - \$500 Million | 11%-20% | Mclean           | Virginia          |



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| Star Rating | Name                                     | Sep 2025                      | years*  | Main Office City | Main Office State |
|-------------|------------------------------------------|-------------------------------|---------|------------------|-------------------|
| ★★★★        | Capitol Private Wealth Group             | \$250 Million - \$500 Million | 11%-20% | Vienna           | Virginia          |
| ★★★★        | Cary Street Partners Investment Advisory | \$5 Billion - \$10 Billion    | 31%-40% | Richmond         | Virginia          |
| ★★★★        | Chase Investment Counsel Corporation     | \$250 Million - \$500 Million | 6%-10%  | Charlottesville  | Virginia          |
| ★★★★        | Kinloch Capital                          | \$250 Million - \$500 Million | 11%-20% | Glen Allen       | Virginia          |
| ★★★★        | Westbourne Investments                   | up to \$250 Million           | 1%-5%   | Alexandria       | Virginia          |
| ★★★★★       | United Brokerage Services                | \$250 Million - \$500 Million | 11%-20% | Parkersburg      | West Virginia     |

\*All firms for which 2020 data was not available, the 5-year AUM CAGR has been represented as "-". Same for all firms with a negative 5-year AUM CAGR.

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## Methodology

**Plant-A Insights Group** and **Newsweek** have partnered to identify **America's Top Financial Advisory Firms 2026**. Over 16,000 Financial advisories registered with the SEC were analyzed to find the best of the best.

To be eligible for evaluation, a financial advisory firm had to have **more than \$20 million assets under management (AUM)**, a minimum of **3 wealth advisers**, at least **5 individual clients**, and **at least two years of SEC registration**. Firms were also screened for clean disciplinary records (as defined by the 12 disciplinary items in Form Adv Part 1) and the availability of portfolio management services to individual investors. These shortlisted firms were then analyzed and scored based on the following factors:

- **Asset Performance:** Growth in assets under management indicates both financial performance and the health of a firm's client base, the cornerstones of advisory excellence. Both short-term (Sept 2024 vs Sept 2025) and long-term (CAGR Sept 2020 to Sept 2025) measures of asset growth are included in the scoring model.
- **Client Performance:** Great advisories retain their clients and attract new ones. Both short and long-term measures of client base growth/shrinkage for short term (Sept 2024 vs Sept 2025) and long term (CAGR Sept 2020 to Sept 2025) are included in the scoring model.
- **Adviser Expertise and Client Ratio:** Measures that capture the credentialed expertise of each firm (% of employees that are registered financial advisory representatives) as well as the client-to-adviser ratio are also considered in the scoring model.
- **Breadth of service offerings:** Great firms offer a bundle of related services for their investors. The number of wealth advisory services, including financial planning services and pension consulting services, are also included in the scoring model.
- **Conflicts of interests:** The best advisories work to prevent conflicts of interest; firms with conflicts of interests are penalized in the scoring model.



The **top 1,000 Financial Advisory Firms** have been recognized as ***America's Top Financial Advisory Firms 2026***. The performance of firms not included in the ranking is not disputed.

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