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America's Top Financial Advisory Firms 2026

By Jennifer H. Cunningham Editor-in-Chief



goals to keep you reeling linancially 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.

Jennifer H. Cunningham

Editor-in-Chief







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

Star Rating	Name	Total AUM Range - Sep 2025	AUM CAGR over 5 years*	Main Office City	Main Office State
****	Covenant Wealth Advisors	\$500 Million - \$1 Billion	21%-30%	Richmond	Virginia
****	Range Advisory	up to \$250 Million	-	Mclean	Virginia
*** ¹ / ₂	AMJ Financial Wealth Management	\$250 Million - \$500 Million	11%-20%	Leesburg	Virginia
****1/2	Andersen Tax	\$5 Billion - \$10 Billion	21%-30%	McLean	Virginia
****_2	Birks Financial	up to \$250 Million	11%-20%	Herndon	Virginia
*** ¹ / ₂	Brown Miller Wealth Management	\$500 Million - \$1 Billion	11%-20%	Mclean	Virginia
****\\2	Chesapeake Investment Management	up to \$250 Million	6%-10%	Mclean	Virginia



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Star Nathry	Ivaille	Sep 2025	years*	main Onice Oity	Walli 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
*** ¹ / ₂	Solitude Financial Services	\$250 Million - \$500 Million	11%-20%	Charlottesville	Virginia
*** ¹ / ₂	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

Star Kating	Name (Sep 2025	years*	wani Onice Oity	GO AD-FREE
***	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

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^{*}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.



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 (% if 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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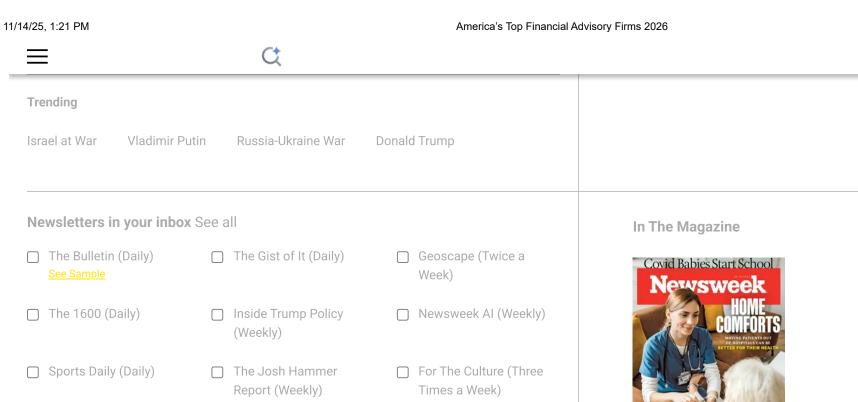
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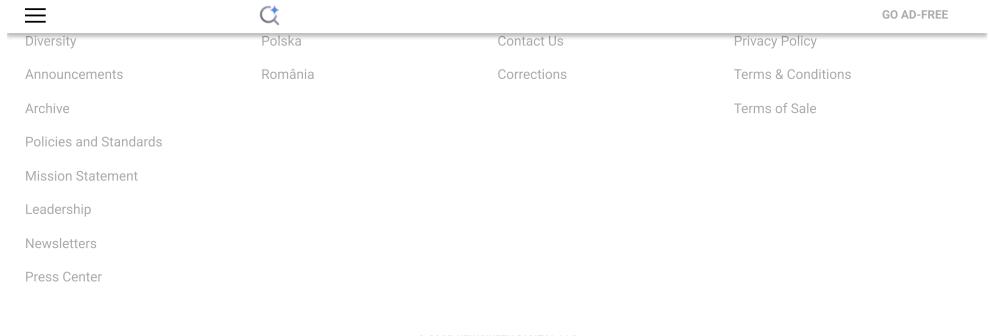
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