

# Best Places to Work for Financial Advisers

*InvestmentNews* presents the 50 Best Places to Work for Financial Advisers in 2018. Check back May 21 for the numerical rankings

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By **Ellie Zhu** and **Liz Skinner**

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**BEST  
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**2018**



These firms go beyond offering financial advisers attractive benefits and perks: they create workplaces that empower employees, giving them the skills and confidence

The winners, named alphabetically here, represent firms with as few as 15 employees to more than 270. These impressive employers are located all across the nation.

Celebrate with these companies at our awards luncheon on May 15 in Chicago, where *InvestmentNews* will reveal rankings for the 2018 Best Places to Work for Financial Advisers. Learn more about the event at [InvestmentNews.com/BPTWevent](http://InvestmentNews.com/BPTWevent).

And keep an eye out for the results in the May 21 issue of *InvestmentNews*.

## FULL LIST

ALL  RIA  HYBRID  BD

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Company Name	Employees	Firm Type	Location	Firm Head	Title
Accredited Investors Wealth Management	41	RIA	Edina, MN	Ross Levin	CEO and Founder
Adviser Investments LLC	78	RIA	Newton, MA	Dan Wiener	CEO
AEPG Wealth Strategies	30	RIA	Warren, NJ	Steven Kaye	CEO and Founder
Appleseed Capital	18	RIA	Chicago, IL	Joshua Strauss	Co-CEO
Armstrong, Fleming & Moore Inc.	17	Hybrid	Washington, DC	Alexandra Armstrong	Principal
Axial Financial Group	31	Hybrid	Burlington, MA	Paul E. Miller	Managing Principal and Portfolio Management Director
Balasa Dinverno Foltz LLC	54	RIA	Itasca, IL	Armond A. Dinverno	President and Co-CEO
Bartholomew & Company, Inc.	24	BD	Worcester, MA	Thomas J. Bartholomew	President

<b>Berman McAleer, LLC</b>	18	Hybrid	Timonium, MD	David L. Bermar			
<b>Bronfman Rothschild</b>	88	RIA	Rockville, MD	Neal Simon			
<b>BSW Wealth Partners</b>	21	RIA	Boulder, CO	David Wolf			
<b>Carson Wealth Management Group</b>	40	Hybrid	Omaha, NE	Ron Carson			
<b>Cassaday &amp; Company, Inc.</b>	45	Hybrid	McLean, VA	Stephan Q. Cassaday			
<b>Cedar Brook Group</b>	69	Hybrid	Cleveland, OH	Bill Glubiak			
<b>Center For Financial Planning</b>	27	Hybrid	Southfield, MI	Timothy Wyman			
<b>CIC Wealth</b>	15	Hybrid	Rockville, MD	Ryan Wibberley			
<b>CJM Wealth Advisers, Ltd.</b>	19	RIA	Fairfax, VA	David D. Greene			
<b>Covington Capital Management</b>	22	RIA	Los Angeles, CA	Jeff Glassman			
<b>Exemplar Financial Network</b>	32	BD	Crystal Lake, IL	David Hubbard			
<b>Fragasso Financial Advisors</b>	49	Hybrid	Pittsburgh, PA	Robert Fragasso			
<b>Greenspring Wealth Management</b>	17	RIA	Towson, MD	John Patrick Collins, Jr.			
<b>Gurtin Municipal Bond Management</b>	72	RIA	Solana Beach, CA	William Gurtin			
<b>Halbert Hargrove Global Advisors, LLC</b>	29	RIA	Long Beach, CA	Russell T. Hill			
<b>JMG Financial Group</b>	49	RIA	Downers Grove, IL	Anthony D. Cecchini			
<b>Lassus Wherley</b>	21	RIA	New Providence, NJ	Clare E. Wherley			

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<b>Legacy Wealth Management, Inc.</b>	22	RIA	Memphis, TN	James J. Isaacs	CEO and President	<a href="#">Sections</a> <a href="#">Subscribe</a>
<b>Merit Financial Advisors</b>	30	Hybrid	Alpharetta, GA	Rick Kent	President and Founder	
<b>Miracle Mile Advisors</b>	16	RIA	Los Angeles, CA	Brock Moseley	Managing Director	
<b>Modera Wealth Management, LLC</b>	56	RIA	Westwood, NJ	Tom Orecchio	CEO	
<b>Moneta Group</b>	276	RIA	Clayton, MO	Eric Kittner	Managing Partner	
<b>MRA Associates</b>	45	RIA	Phoenix, AZ	Mark Feldman	Managing Partner and CEO	
<b>NCA Financial Planners</b>	28	Hybrid	Cleveland, OH	Kevin Myeroff	CEO and President	
<b>Pell Wealth Partners</b>	15	BD	Rye Brook, NY	Geri Pell	CEO	
<b>Pensionmark Financial Group</b>	25	Hybrid	Santa Barbara, CA	Troy Hammond	CEO and President	
<b>Per Stirling Capital Management, LLC</b>	29	Hybrid	West Lake Hills, TX	J.P. O'Sullivan	Managing Director	
<b>Petersen Hastings Investment Management</b>	18	RIA	Kennewick, WA	Jeffrey Petersen	CEO	
<b>Private Ocean LLC</b>	29	RIA	San Rafael, CA	Greg Friedman	CEO and President	
<b>Private Vista, LLC</b>	32	RIA	Chicago, IL	Jeffrey M Toner	Managing Partner	
<b>Provis Management Group, LLC</b>	29	Hybrid	Clearwater, FL	Raymond Ferrara	CEO	
<b>RegentAtlantic</b>	50	RIA	Morristown, NJ	George Stapleton	CEO	
<b>Richard P. Slaughter Associates, Inc</b>	16	RIA	Austin, TX	Brooks Slaughter	CEO	
<b>Savant Capital Management</b>	143	RIA	Rockford, IL	Brent R. Brodeski	CEO	
<b>Signature Estate &amp; Investment Advisors</b>	69	RIA	Los Angeles, CA	Brian Holmes	CEO and President	

<b>Signature Family Wealth Advisors</b> <small>Awards &amp; Recognition</small>	38	RIA	Norfolk, VA	Randy Webb	CEO and President	<a href="#">Sections</a>	<a href="#">Subscribe</a>
<b>SignatureFD, LLC</b>	64	RIA	Atlanta, GA	Jeff Peller			CEO
<b>SYM Financial Advisors</b>	45	RIA	Winona Lake, IN	Jerry Yeager			CEO
<b>The Colony Group</b>	97	RIA	Boston, MA	Michael Nathanson			CEO
<b>Tolleson Wealth Management</b>	145	RIA	Dallas, TX	Carter Tolleson			CEO
<b>True North Advisors</b>	20	RIA	Dallas, TX	Scott Wood			CEO and Founding Principal
<b>West Financial Services, Inc.</b>	25	RIA	McLean, VA	Glen J. Bucu			President

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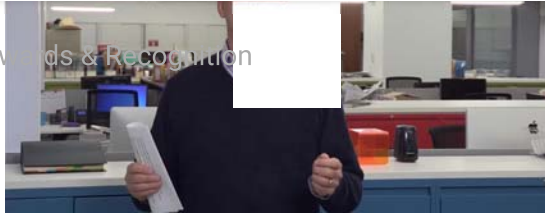


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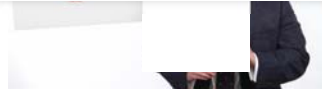
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