

Financial Planning & Investment Advisory Firms

Ranked by Value of Assets Under Advisement from Alabama offices

COMPILED BY
ERICA JOINER WEST

RANK	FIRM	TOP EXECUTIVE	ADDRESS	PHONE/WEBSITE	VALUE OF ASSETS UNDER ADVISEMENT IN ALABAMA	TOTAL BROKERAGE ASSETS	EMPLOYEES IN ALABAMA	EMPLOYEES COMPANYWIDE	YEAR FOUNDED
1	Captrust	Eddie Welsh	2614 19th St. S. Birmingham, AL 35209	205-949-6040 captrust.com	\$15.7 billion	\$1.7 billion	24	1,088	1997
2	WA Asset Management LLC	Joshua Reidinger	600 University Park Place, Ste. 501 Birmingham, AL 35209	205-871-3334 waasset.com	\$4.2 billion	N/A	36	44	1999
3	Peachtree Planning	Andrew Meehan	3500 Blue Lake Dr., Ste. 220 Birmingham, AL 35243	205-533-9452 peachtreepanning.com	\$3.2 billion	DND	36	167	1987
4	Bridgeworth Wealth Management	DeLynn Zell	101 25th St. N., Ste. 100 Birmingham, AL 35203	205-208-8700 bridgeworthllc.com	\$2.4 billion	\$203.7 million	63	63	2008
5	Leavell Investment Management	Andrew Grinstead	210 St. Joseph St. Mobile, AL 36602	251-433-3709 leavellinvestments.com	\$2.3 billion	N/A	28	28	1979
6	Oakworth Capital Bank	Scott Reed	850 Shades Creek Pkwy. Birmingham, AL 35209	205-263-4700 oakworth.com	\$2 billion	N/A	111	119	2008
7	Mitchell McLeod Pugh & Williams	Richard Mitchell, Douglas McLeod, Bragg Van Antwerp	2610 Dauphin St. Mobile, AL 36606	251-471-2027 mmpw.com	\$1.9 billion	N/A	13	13	2006
8	Jackson Thornton Asset Management LLC	Thomas Bedsole Jr.	200 Commerce St., Ste. 300 Montgomery, AL 36104	334-834-7660 jt-am.com	\$1.7 billion	DND	16	16	1999
9	RFG Advisory	Bobby White	1400 Urban Center Dr., Ste. 475 Vestavia Hills, AL 35242	205-397-2450 rfgadvisory.com rfgadvisorywealth.com	\$1.5 billion	\$622.3 million	69	140	2003
10	Eversource Wealth Advisors	Mark Wesson	3500 Colonnade Pkwy., Ste. 150 Birmingham, AL 35244	205-982-5515 eversourcewealthadvisors.com	\$1.2 billion	N/A	30	42	2017
11	1919 Investment Counsel	B. Hanson Slaughter	2311 Highland Ave. S., Ste. 190 Birmingham, AL 35205	205-414-3350 1919ic.com	\$1 billion	\$21 billion	10	130	1919
12	Raymond James (formerly Boyd Financial Group)	Partnership	Branch offices in Fairhope, Montgomery & Selma	334-875-7020 raymondjames.com/ montgomery	\$1 billion	\$200 million	11	14	2015
13	Kelley & Mullis Wealth Management	Michael Mullis	2008 Stonegate Trail, Ste. 112 Vestavia Hills, AL 35242	205-733-8006 kmwealthmanagement.com	\$870 million	\$870 million	8	8	1986
14	Southern Financial Group	Todd Holder, David Painter	700 Corporate Pkwy. Birmingham, AL 35242	205-383-1415 thesouthernfinancialgroup.com	\$830.1 million	\$830.1 million	8	8	2007
15	MavenCross Wealth Advisors	Jeff Roberts	31 Inverness Center Pkwy., Ste. 550 Birmingham, AL 35242	205-313-9150 mavencrosswealth.com	\$782 million	\$782 million	13	13	1992
16	CapSouth Partners Inc.	Donald Bolden	2216 W. Main St. Dothan, AL 36301	334-673-8600 capsouthwm.com	\$666.2 million	\$759.1 million	17	23	2001
17	Porter White Investment Advisors Inc.	Goodloe White	15 Richard Arrington Jr. Blvd. N. Birmingham, AL 35203	205-252-3681 pwco.com	\$633 million	\$633 million	11	11	1995
18	Meld Financial	Kyle Whittington	3008 Pump House Rd. Birmingham, AL 35243	205-967-4200 meldfinancial.com	\$493 million	\$534 million	11	12	1984
19	Monroe Vos Consulting Inc.	Timothy Callahan	2000-A SouthBridge Pkwy., Ste. 520 Birmingham, AL 35209	205-879-6824 monroevos.com	\$440 million	\$440 million	2	17	1994
20	EverThrive Financial Group (formerly Grinkmeyer Leonard Financial)	Valerie Leonard	2279 Valleydale Rd., Ste. 210 Birmingham, AL 35244	205-970-9088 everthrivfinancial.com	\$284.7 million	\$65.6 million	8	8	2007

RANK	FIRM	TOP EXECUTIVE	ADDRESS	PHONE/WEBSITE	VALUE OF ASSETS UNDER ADVISEMENT IN ALABAMA	TOTAL BROKERAGE ASSETS	EMPLOYEES IN ALABAMA	EMPLOYEES COMPANYWIDE	YEAR FOUNDED
21	BMSS Wesson Wealth Solutions	Mark Wesson	3500 Colonnade Pkwy., Ste. 150 Birmingham, AL 35242	205-982-5555 bmsswesson.com	\$277 million	\$277 million	5	6	2016
22	Sandifer Wealth Management	James Sandifer	3615 Old Shell Rd. Mobile, AL 36608	251-340-1984 sandiferwealth.com	\$209 million	\$209 million	5	5	1984
23	Strauss Financial Group Inc.	Arthur Strauss	2201 Cahaba Valley Dr. Birmingham, AL 35242	205-967-9595 straussfinancial.com	\$200 million	\$200 million	3	3	1988