

Registered Investment Advisor List

The following Registered Investment Advisors have completed the RIA Submission Form as of 06/23/2026:

360 Wealth Management (RIA117)	Blue Chip Partners (AN338545)
Accurate Wealth Management (AN334305)*	Blue Trust Inc (AN378463)
Access Financial Planning, LLC (AN375126)	Brookstone Capital Management (RIL27) ■
Acorn Financial Advisory Services (RIA35)	Brookwood Investment Group (AN364947)
Acrylic Financial (AN298523)* ■	By Design Financial Planning (AN380647)
Aduna Capital LLC (AN365876)	Callahan Financial Planning/TS
Advisory Alpha (AN322093)	Bank (AN302847)
All-Pro Advisors (AN364679)	Cambridge (AN293330) ■
Almanack Investment Partners (RIA60)	Capital Asset Advisory Services (RIL6)* ■
American Capital Management (RIL8)* ■	CapitalWE (AN387426)
Apollon Wealth Management (AN377549)	Centaurus Financial, Inc. (AN294012) ■
ARQ Wealth Management (RIA102)	Cerity Partners (AN398178)
Artifex Financial Group (AN323810)	ChangePath (AN297205)* ■
Ashton Thomas Private Wealth (AN402902)	Chicago Partners Investment
Asset Strategy Advisors (AN378433)	Group (AN378420)
AssuredPartners Investment Advisors	Client One Securities, LLC (RIA38)
(AN387349)	Clovelly Wealth (AN365481)
Atlas Capital Management (AN399663)	Concurrent Investment Advisors, LLC
Atomi Financial Group DBA Compound	(AN360971)
Planning (AN380631)	Condor Capital Wealth
Ausdal Financial Partners (AN400295) ■	Management (AN353510)
Avaii Wealth Management (AN319770)	Continuum Advisory. LLC (AN307417)*
Avidian Wealth Solutions (AN301677)*	Cook Wealth, LLC (AN365324)
Avior Wealth Management (AN301018)	Core Planning, LLC (AN364665)
Axxcess Wealth Management (AN300980)*	Cornerstone Financial Group (AN371796)
Behl Wealth Management (AN364629)	Cornerstone Planning Group (AN393479)
Belpoint Asset Management (RIL99)* ■	Cozad Asset Management (AN337863)
Bianco Wealth Advisors (AN388971)	CPR Investments, Inc. (RIA73)*
Binnacle Financial Group (AN366031)	Creative Financial Designs (RIL54)* ■
Blackridge Asset Management (AN374995)	Crescent Wealth Advisory (AN364677)

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■ Investment Advisory Firms receive a portion of the override

Crestone Financial Advisors (AN378454)
[Cutter and Company \(RIL44\)*](#) ■
Detalus Advisors LLC (AN383096)
DMK Advisor Group (RIA69)
[Dynamic Wealth Advisors \(AN307191\)*](#)
[Emerson Equity \(RIA43\)*](#)
EP Wealth Advisors (AN360986)
Everest Financial Advisors (AN385333)
Exhale Wealth Management (AN378428)
F5 Financial Planning (AN364669)
FamilyWealth Advisers (AN391717)
Farther Finance Advisors (AN338122)
[Financial Partners, LLC \(RIA116\)*](#)
FinTrust Capital Advisors (AN325788)
First Pacific Financial (AN364790)
Focal Point Financial Group (AN379776)
FourStar Wealth Advisors (AN362368)
[Fusion Investment Advisors \(RIA59\)*](#)
Gary Ernest Pia DBA Mission Street Wealth Planning (AN382815)
[Geneos Wealth Management \(AN381728\)*](#)
Gentry Financial (AN386579)
George Financial Services (AN374565)
Gibbs Wealth Management (AN339759)
Girard Partners Ltd (AN374351)
Global Financial (RIA47)
Gordon Asset Management (AN366172)
[Gradient Wealth Management \(AN357386\)*](#)
Great Lakes Bay Financial (AN366033)
Great Waters Wealth Management (AN352689)
Harbour Investments (AN292686)
Harold Dance Investments (AN376893)
Henrickson Nauta (AN309348)
[HighTower Advisors \(RIA39\)*](#)
Highwind Wealth Management (AN384077)
[Hollencrest Capital Management \(AN337577\)*](#)
[IFP Advisors \(RIA113\)*](#)

Insight Advisors (AN376009)
Inspire Advisors (AN301553)
Integrated Wealth Concepts (AN382850)
Intero Financial Planning (AN375124)
Invest Your Faith (AN366086)
Investably (AN364789)
INVST (RIA77)
IP Financial Advisory (AN324027)
IPI Wealth Management (RIA123)
Ironwood Wealth Management LLC (AN383036)
Irvine Wealth Planning Strategies LLC (AN374235)
[J Alden Associates \(AN379939\)*](#)
J.W. Cole Advisors (RIL34) ■
KCPAG Financial Advisors (AN324429)
Kingsley Financial (AN386803)
Kinson Wealth Group (AN378436)
KMS Financial (RIA20)
[Kovack Advisors \(RIL22\)*](#) ■
L Squared Wealth (AN386195)
[Latitude Advisors \(RIA66\)*](#)
Legacy Planning Group LLC
DBA Wealthbound Advisors (AN381866)
Level Four Advisory Services (AN399577)
Leverage Planners Wealth Management (AN388960)
LifeGuide Financial Advisors (AN338332)
Lifewater Wealth Management (AN364897)
Linda S Lubitz CFP PA DBA Meira Wealth (AN378422)
LM Kohn (RIA41)
Lotusment Advisors (AN386805)
Lucia Wealth Management (RIL85) ■
[Maia Wealth Management \(AN305368\)*](#)
MariPau Wealth Management (AN326936)
Mash Financial Planning (AN364740)

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MB Generational Wealth (AN364682)
Mendel Money Management (AN364676)
Meridian Wealth Management (AN336999)
Meridian Wealth Partners (AN365351)
Merit Financial Group (AN395695)
Mile Wealth Management (AN304350)
Millennial Wealth LLC (AN364673)
Modern Capital Advisors (AN325674)
Modern Wealth Advisors (AN379699)
Momentum Independent Network (AN328693)
Momentum Private Wealth
Management (AN369954)
Money Concepts Advisory Services
(AN321403) ■
Moore Financial Planning (AN292746)
[Motiv8 Investments \(RIA19\)*](#)
Mutual Advisors (RIA119)
Newbridge Wealth Management (AN375801)
NewEdge Advisors (AN339760)
NewEra Wealth Advisors, Inc (AN377739)
No Fate BWWM (AN364613)
NorthAvenue LLC (AN378426)
[Oakwood Capital \(AN338144\)*](#) ■
One Wealth Planning LLC (AN378453)
OneDigital Investment Advisors (AN389142)
[OpenArc Risk \(AN402046\)*](#)
Palomar Advisors (AN375125)
Panorama Financial (AN385225)
Partner Wealth Planning (AN379290)
Paul D Sippil & Associates (AN364630)
Peace of Mind Wealth
Management (AN376423)
Penobscot Financial Advisors (AN298405)
Polaris Financial DBA Credit Union Wealth
Group (AN386599)
Polley Wealth Management (AN365475)
Ponoma Wealth Management (AN378745)

Portside Wealth Group (AN338154)
PrairieView Partners (AN378445)
Private Advisor Group (AN310755)
[Prospera Financial Services \(AN391061\)*](#) ■
[Prosperity Capital \(RIA2\)*](#)
Prostatis Financial Advisors Group (AN323323)
Pysnik Financial (AN385334)
Rebel Financial (AN307191)
Red Night Capital, LLC (AN378460)
[Red Oak Capital Management \(AN294265\)*](#)
Redhawk Wealth Advisors (RIL7) ■
Redwood Private Wealth (AN323807)
[Retirement Wealth Advisors \(AN300357\)*](#)
Ridgeline Wealth Advisors (AN379452)
Rossby Financial (AN388479)
[Ross Sinclair and Associates \(RIL115\)*](#) ■
RPg Family Wealth Advisory, LLC (RIA1)
SageOak Financial, LLC (AN364658)
Sanders Retirement Planning, LLC (AN377962)
Santara Wealth Management (AN387417)
Savvy Advisors, INC (AN353489)
Schiavi + Company LLC DBA Clariti Wealth
Advisors (AN378449)
Sequoia Private Wealth
Management (AN365877)
[SGL Financial \(RIA49\)*](#)
Simplify Wealth Planning (AN378438)
Singer Wealth Advisors (AN336390)
[Snowden Capital Advisors \(AN295269\)*](#)
[Sollinda Capital Management LLC
\(AN377501\)*](#)
Sound Income Strategies (RIA46)
Spinnaker Investment Group, LLC (AN364987)
Statheros Financial Solutions (AN301518)
[Steward Partners Investment Advisory, LLC
\(AN329794\)*](#) ■
Stonehearth Capital Management (AN371505)

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Strategic Blueprint (AN372386) ■
Symmetry Wealth Management dba Alo
Financial Planning (AN386595)
[Symphonic Financial Advisors \(RIA9\)*](#)
Tactive Advisors (AN398849)
TandemGrowth Financial Advisors,
LLC (AN365786)
[Tap Consulting LLC/Genex Consulting
\(AN305796\)*](#)
[The Strategic Financial Alliance, Inc \(RIL118\)*](#)
The Wright Legacy Group (RIA3)
Thomas Jones Financial (AN385721)
Thrift Financial (AN363483)
TLG Advisors (RIL5) ■
[TownSquare \(RIA70\)*](#)
[Triumph Capital Management \(AN298798\)*](#)
[Trust Advisory Group \(AN308509\)*](#) ■
[Two West Capital \(AN300355\)*](#)
[United Capital Financial Advisers \(RIL26\)*](#) ■
[United Planners \(RIL53\)*](#) ■
Valiant Wealth LLC (AN378435)
Valtinson Bruner Financial Planning
LLC (AN325458)
Victory Financial Group (AN372200)
[Virtue Capital \(RIL88\)*](#) ■
Walkner Condon Financial Advisors
(AN384125)
Waymaker Financial Planning (AN389144)
Waypoint Financial Planning (AN386139)
[Wealthwatch \(RIA100\)*](#)
West Point Wealth Management (AN328859)
William Joseph Capital Management
(AN323377)
WLTH Capital Management (AN385437)
[WMG Financial Advisors \(AN336054\)*](#)
World Market Advisors (AN364992)
Your Financial Partnership (AN366030)

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