

Financial Planning & Investment Advisory Firms

Ranked by value of assets under management from Alabama offices as of Feb. 20, 2026.
In cases of a tie, those companies are ranked by number of Alabama employees.

COMPILED BY
ERICA JOINER WEST

RANK	FIRM	TOP EXECUTIVE	ADDRESS	PHONE/WEBSITE	VALUE OF ASSETS UNDER MANAGEMENT FROM AL OFFICES AS OF 2/20/26	# OF ALABAMA EMPLOYEES	# EMPLOYEES COMPANY-WIDE	YEAR FOUNDED IN AL
1	CapTrust	Eddie Welsh Managing Director, Head of Wealth Management	One Commerce St., #800 Montgomery, AL 36104	334-272-1192 captrust.com	\$22.1 billion	28	1,930	1997
2	Waverly Advisors, LLC	Justin T. Russell Partner, President & CEO	600 University Park Place, Ste. 501 Birmingham, AL 35209	205-871-3334 waverly-advisors.com	\$6.1 billion	71	416	1999
3	Peachtree Planning	Dustin Dawes, CEP	3500 Blue Lake Dr., Ste. 220 Birmingham, AL 35243	205-533-9452 peachtreepanning.com	\$4.4 billion	24	100	1987
4	The Welch Group	Stewart Welch III, Founder	3940 Montclair Rd., Fifth Floor Birmingham, AL 35213	205-879-5001 welchgroup.com	\$3.8 billion	41	41	1984
5	Leavell Investments	Andrew Grinstead Portfolio Manager, CEO	210 St. Joseph St. Mobile, AL 36602	251-433-3709 leavellinvestments.com	\$3.8 billion	35	36	1979
6	Savant Wealth Management	Brent Brodeski, CEO DeLynn Zell, Senior Managing Partner	101 25th St. N., Ste. 100 Birmingham, AL 35203	205-208-8700 savantwealth.com	\$3.6 billion	57	656	1986
7	Mitchell McLeod Pugh & Williams Inc. (MMPW)	Douglas McLeod, Bragg Van Antwerp, Alex Arendall, Michael Barnett	2610 Dauphin St. Mobile, AL 36608	251-471-2027 mmpw.com	\$2.8 billion	16	16	2006
8	Jackson Thornton Wealth Management	Shaw Pritchett, President	200 Commerce St., Ste. 300 Montgomery, AL 36104	334-834-7660 jt-wm.com	\$2.4 billion	15	15	1999
9	Advo(k)ate Advisors	Renn Williams, Andrew Blankenship Partners	6801 Cahaba Valley Rd., Ste. 206 Birmingham, AL 35242	659-238-0010 advokateadvisors.com	\$1.9 billion	9	9	2022
10	1919 Investment Counsel	B. Hanson Slaughter Managing Director and Senior Client Advisor	2311 Highland Ave. S., Ste. 190 Birmingham, AL 35205	205-414-3350 1919ic.com	\$1.7 billion	10	135	1919
11	Meridiem Advisory Group Raymond James	Sam Chambers, Trip Phillips, Derrick Sikes, Partners	3625-B Halcyon Park Dr. Montgomery, AL 36117	334-481-1400 meridiemadvisorygroup.com	\$1.5 billion	12	12	2022
12	MavenCross Wealth Advisors	Jeff Roberts Founder & Private Wealth Advisor	31 Inverness Center Pkwy., Ste. 550 Birmingham, AL 35242	205-313-9150 mavencrosswealth.com	\$1.2 billion	16	16	1992
13	Southern Financial Group	Todd Holder, David Painter	700 Corporate Pkwy. Birmingham, AL 35242	205-383-1415 thesouthernfinancialgroup.com	\$1.1 billion	8	8	2007
14	Marble Wealth	Matthew Murphy, CEO	4137 Carmichael Rd., Ste. 210 Montgomery, AL 36106	334-679-4800 marblewealth.com	\$1.1 billion	6	6	2022
15	CapSouth Wealth Management	Marshall Bolden, CEO	2216 W. Main St. Dothan, AL 36301	800-929-1001 capsouthwm.com	\$1 billion	14	21	2001
16	Porter White & Company	Goodloe White, President	1927 1st Ave. N., 10th Floor Birmingham, AL 35203	205-252-3681 pwco.com	\$789.7 million	5	5	1995
17	Meld Financial	Kyle Whittington, Managing Partner	3008 Pump House Rd. Birmingham, AL 35243	205-967-4200 meldfinancial.com	\$777 million	9	9	1986
18	Nowlin & Associates Wealth Management	Justin Craft, President	2718 20th St. S. Homewood, AL 35209	205-440-4133 nowlinwm.com	\$750 million	35	45	1974
19	BMSS Wesson Wealth Solutions	Mark Wesson, CEO	3500 Colonnade Pkwy., Ste. 150 Birmingham, AL 35243	205-982-5555 bmsswesson.com	\$737.2 million	10	11	2015
20	Everthrive Financial Group	Valerie Leonard	2279 Valleydale Rd., Ste. 210 Birmingham, AL 35244	205-970-9088 everthrivefinancial.com	\$610.6 million	13	13	2007
21	Hottel Capital	Liza Hottel, CFO	2801 2nd Ave. S., Ste. A Birmingham, AL 35233	205-271-7028 hottelcapital.nm.com	\$586.5 million	6	6	1994

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22	Financial Strategies Group LLC	Gene Pospicil, CFP, CEPA	129 Washington St. Huntsville, AL 35801	256-705-0300 FSGweb.net	\$300 million	7	7	2004
23	Wilkins Miller Wealth Management	Greg Bowen, Director of Wealth Management	41 W. I-65 Service Rd. N. Ste. 400 Mobile, AL 36608	251-410-6700 wmwealthmgt.com	\$258 million	4	4	2016

Source: *Business Alabama* survey