Financial Planning & Investment Advisory Firms

COMPILED BY ERICA JOINER WEST

Ranked by Value of Assets Under Advisement from Alabama Offices.
DND=Did Not Disclose N/A=Not Applicable
Source: Business Alabama Surveys

RANK	FIRM	TOP EXECUTIVE	ADDRESS CITY, STATE & ZIP	PHONE FAX	WEBSITE	VALUE OF ASSETS UNDER ADVISEMENT	TOTAL BROKERAGE ASSETS	NUMBER OF ALABAMA EMPLOYEES	NUMBER OF EMPLOYEES COMPANYWIDE
1	**Captrust**	Fielding Miller	4208 Six Forks Rd., Ste. 1700 Raleigh, NC 27609	919-870-6822 919-870-8891	captrust.com	$7.4 billion	$365.8 billion	26	676
2	**Warren Averett Asset Management LLC**	Joshua Reidinger	600 University Park Place, Ste. 501 Birmingham, AL 35209	205-871-3334 205-879-1114	waasset.com	$2.6 billion	$3 billion	41	51
3	**Peachtree Planning**	Andrew Meehan	2151 Highland Ave. S., Ste. 100 Birmingham, AL 35205	205-533-9452 205-930-9430	peachtreeplanning.com	$2.4 billion	DND	25	121
4	**Aptus Capital Advisors LLC**	JD Gardner	265 Young St. Fairhope, AL 36532	251-517-7198	aptuscapitaladvisors.com	$1.7 billion	DND	5	7
5	**Bridgeworth LLC**	DeLynn Zell	3800 Colonnade Pkwy., Ste. 300 Birmingham, AL 35243	205-208-8700	bridgeworthfinancial.com	$1.6 billion	DND	53	53
6	**RFG Advisory**	Bobby White	1400 Urban Center Dr., Ste. 475 Vestavia Hills, AL 35242	205-397-2450	rfgadvisory.com	$1.51 billion	$629,000	33	65
7	**Oakworth Capital Bank**	Scott Reed	850 Shades Creek Pkwy. Birmingham, AL 35209	205-263-4700	oakworthcapital.com	$1.35 billion	N/A	95	95
8	**Mitchell McLeod Pugh & Williams**	Richard Mitchell Douglas McLeod	2610 Dauphin St. Mobile, AL 36606	251-471-2027 251-471-2302	mmpw.com	$1.31 billion	N/A	12	12
9	**Jackson Thornton Asset Management LLC**	Tommy West	200 Commerce St., Ste. 300 Montgomery, AL 36104	334-834-7660 334-956-5090	jt-am.com	$1.28 billion	DND	17	17
10	**1919 Investment Counsel**	B. Hanson Slaughter	2311 Highland Ave. S., Ste. 190 Birmingham, AL 35205	205-414-3350 205-949-3503	1919ic.com	$758 million	$15.2 billion	9	130
11	**Southern Financial Group**	Todd Holder David Painter	700 Corporate Pkwy. Birmingham, AL 35242	205-383-1415 205-383-1416	thesouthernfinancialgroup.com	$680.1 million	$680.1 million	8	8
12	**CapSouth Partners Inc. dba CapSouth Wealth Management**	Donald Bolden	2216 W. Main St. Dothan, AL 36301	334-673-8600 334-673-8625	capsouthwm.com	$494.2 million	N/A	11	18
13	**Porter White & Co.**	Goodloe White	15 Richard Arrington Jr. Blvd. N. Birmingham, AL 35203	205-252-3681	pwco.com	$484 million	DND	10	10
14	**The Boyd Financial Group**	Thomas Boyd	808 Alabama Ave. Selma, AL 36701	334-875-7020 334-418-8825	boydfinancialgroup.com	$402 million	$402 million	5	5
15	**Meld Financial Inc.**	Mark McGarvey	3008 Pump House Rd. Birmingham, AL 35243	205-967-4200 205-967-9724	meldfinancial.com	$401.7 million	$427.7 million	10	11
16	**Monroe Vos Consulting Group Inc.**	Timothy Callahan	2000-A SouthBridge Pkwy., Ste. 520 Birmingham, AL 35209	205-879-6824 205-879-6863	monroevos.com	$353.4 million	$353.4 million	2	18
17	**Grinkmeyer Leonard Financial**	Trent Grinkmeyer Valerie Leonard	2279 Valleydale Rd., Ste. 210 Birmingham, AL 35244	205-970-9088 866-774-9029	grinkmeyerleonard.com	$270.8 million	$270.8 million	8	8

Notes:

1) Captrust, ranking second on our list last year, bought number 3 ranked Welch Hornsby, moving into the top spot
2) Highland Associates, ranked first last year, did not participate in this year's survey