



Investopedia 100 Top Financial Advisors of 2019



The Investopedia 100 celebrates financial advisors who are making significant contributions to critical conversations about financial literacy, investing strategies, life-stage planning and wealth management. They influence the practice of financial advice, and help educate millions of investors.

TOP 10 ADVISORS

01



Michael Kitces

Pinnacle Advisory Group,
Inc.
Columbia, MD

02



Joshua Brown

Ritholtz Wealth
Management LLC
New York City, NY

03



04





Sophia Bera

Gen Y Planning
Austin, TX



Cary Carbonaro

United Capital
Huntington, NY

05



Marguerita Cheng

Blue Ocean Global Wealth
Gaithersburg, MD

06



Jeff Rose

Good Financial Cents
Nashville, TN

07



Douglas Boneparth

Bone Fide Wealth, LLC
New York City, NY

08



Ted Jenkin

oXYGen Financial Inc.
Atlanta, GA

09



10





THE INVESTOPEDIA 100

ARIZONA

Dana Anspach

Sensible Money, LLC

Scottsdale, AZ

George Grombacher

George Grombacher

Phoenix, AZ

CALIFORNIA

Louis Barajas

Wealth Management LAB

Irvine, CA

Brittney Castro

Financially Wise, Inc.

Los Angeles, CA

Alex Chalekian

Lake Avenue Financial

Pasadena, CA

Cathy Curtis

Curtis Financial Planning, LLC

Oakland, CA

Jonathan DeYoe

DeYoe Wealth Management

Berkeley, CA

Windus Fernandez Brinkkord

Trilogy Financial Services, Inc.

San Diego, CA

Hilary Hendershott

Hendershott Wealth Management, LLC

San Jose, CA

Corey Hoffstein

**Ryan Inman**

Physician Wealth Services
San Diego, CA

Anjali Jariwala

Fit Advisors
Redondo Beach, CA

Tom Lydon

Global Trends Investments
Orange County, CA

Brock Moseley

Miracle Mile Advisors
Bell Canyon, CA

Ara Oghoorian

ACap Asset Management
Encino, CA

Robert Pagliarini

Pacifica Wealth
Mission Viejo, CA

David Rae

Financial Planner LA
Los Angeles, CA

Sara Rajo-Miller

Miracle Mile Advisors
Los Angeles, CA

Breanna Reish

Wealth of Confidence
Riverside, CA

Taylor Schulte

Define Financial
San Diego, CA

Winnie Sun

Sun Group Wealth Partners
Irvine, CA

David Waldrop

Richmond Capital Advisors



Nella Webster

Miracle Mile Advisors

Newport Coast, CA

Jason Wenk

FormulaFolios

Los Angeles, CA

FLORIDA

James Baskey

Sickle Hunter Financial Advisors

Tampa, FL

Barry Flagg

Veralytic

Tampa, FL

Carolyn McClanahan

Life Planning Partners, Inc.

Jacksonville, FL

Travis Sickle

Sickle Hunter Financial Advisors

Tampa, FL

Rebecca Walser

Walser Wealth Management

Tampa, FL

GEORGIA

Jeff Bernier

TandemGrowth Financial Advisors, LLC

Johns Creek, GA

Ted Jenkin

oXYGen Financial Inc.

Atlanta, GA

Russ Thornton

Wealthcare for Women

Atlanta, GA

James Watkins

The Watkins Firm



ILLINOIS

Eric Billimoria

WealthCare Advisors, LLC
Schaumburg, IL

Dave Grant

Retirement Matters, Inc.
Barrington, IL

Phil Huber

Huber Financial Advisors, LLC
Chicago, IL

Heather Locus

Balasa Dinverno Foltz LLC
Itasca, IL

INDIANA

Justin Castelli

RLS Wealth Management
Fishers, IN

Joe Clark

Financial Enhancement Group, LLC
Anderson, IN

Adam Cmejla

Integrated Planning & Wealth Management, LLC
Carmel, IN

KANSAS

Peter Mallouk

Creative Planning, Inc.
Overland Park, KS

MASSACHUSETTS

Chris Chen

Insight Financial Strategists, LLC
Waltham, MA

Kirk Chisholm

Innovative Advisory Group, LLC
Lexington, MA

Jamie Ebersole



Preston McSwain

Fiduciary Wealth Partners
Boston, MA

Eric Roberge

Beyond Your Hammock
Boston, MA

Jeffrey Tomaneng

Jeffrey N. Tomaneng, CFP®
Waltham, MA

MARYLAND

Lazetta Braxton

Financial Fountains
Baltimore, MD

Marguerita Cheng

Blue Ocean Global Wealth
Gaithersburg, MD

Rianka Dorsainvil

Your Greatest Contribution
Lanham, MD

Zaneilia Harris

Harris & Harris Wealth Management Group
Upper Marlboro, MD

Michael Kitces

Pinnacle Advisory Group, Inc.
Columbia, MD

Brad Sherman

Sherman Wealth Management
Rockville, MD

MICHIGAN

Ben Carlson

Ritholtz Wealth Management LLC
Grand Rapids, MI

George Papadopoulos

George Papadopoulos
Novi, MI



Kathy Longo

Flourish Wealth Management

Minneapolis, MN

Kyle Moore

Quarry Hill Advisors

St. Paul, MN

Joe Pitzl

Pitzl Financial

Arden Hills, MN

MISSOURI

Peter Lazaroff

Plancorp, LLC

Saint Louis, MO

NORTH CAROLINA

Peter Huminski

Thorium Wealth Management, LLC

Kernersville, NC

Nina O'Neal

Archer Investment Management

Raleigh, NC

NORTH DAKOTA

Benjamin Brandt

Capital City Wealth Management

Bismarck, ND

NEBRASKA

Ron Carson

Carson Wealth

Omaha, NE

Paul West

Carson Wealth

Omaha, NE

NEW JERSEY

David Dietze

Point View Wealth Management, Inc.



Financial Life Focus, LLC
Livingston, NJ

Brendan Mullooly
Mullooly Asset Management, Inc.
Wall Township, NJ

Andrew Wang
Runnymede Capital Management, Inc.
Morristown, NJ

NEW YORK

Douglas Boneparth
Bone Fide Wealth, LLC
New York City, NY

Joshua Brown
Ritholtz Wealth Management LLC
New York City, NY

Cary Carbonaro
United Capital
Huntington, NY

Stacy Francis
Francis Financial
New York City, NY

Anthony Isola
Ritholtz Wealth Management LLC
Stony Brook, NY

Jeffrey Levine
Blueprint Wealth Alliance
Garden City, NY

Maurice Lyle
Lee, Nolan & Koroghlian, LLC
New York City, NY

Roger Ma
Lifelaidout
New York City, NY

Ronald Rogé
Rogé & Co.



Julian Schubach

ODI Financial, Inc.

New York City, NY

Ed Slott

Ed Slott and Company, LLC

Rockville Centre, NY

David Flores Wilson

Watts Capital

New York City, NY

OKLAHOMA

Autumn K. Campbell

The Planning Center

Tulsa, OK

OREGON

Isaac Presley

Cordant Wealth Partners

Portland, OR

PENNSYLVANIA

Wesley Gray

Alpha Architect

Philadelphia, PA

SOUTH DAKOTA

Rick Kahler

Kahler Financial Group, Inc.

Rapid City, SD

TENNESSEE

Justin Goodbread

Heritage Investors

Knoxville, TN

Jeff Rose

Good Financial Cents

Nashville, TN

TEXAS

Sophia Bera



Scott Bishop

STA Wealth Management
Houston, TX

Kim Butler

Partners for Prosperity, LLC
Mount Enterprise, TX

Rick Ferri

Ferri Investment Solutions
Georgetown, TX

Hannah Moore

Guiding Wealth Management
Dallas, TX

Stephanie Sammons

Sammons Wealth Management
Dallas, TX

Rob Schulz

Schulz Wealth
Mansfield, TX

Roger Whitney

The Retirement Answer Man
Fort Worth, TX

UTAH

Patrick Donohoe

Paradigm Life
Salt Lake City, UT

VIRGINIA

Ric Edelman

Edelman Financial Engines, LLC
Fairfax, VA

Sterling Neblett

Centurion Wealth Management
McLean, VA

WASHINGTON

Margaret 'Meg' Bartelt



WISCONSIN

Tony Liddle

Prosper Wealth Management

Wausau, WI

Robert Riedl

Endowment Wealth Management, Inc.

Appleton, WI

METHODOLOGY

Investopedia's proprietary methodology focuses on awarding financial advisors who have demonstrated a top-of-the-industry ability to reach the largest and most relevant financial and investing audience, as measured by the impact and quality of their published work, public appearances, and online following. The 2019 Investopedia 100 also heavily weighed peer-to-peer nominations, highlighting the most influential advisors who were recommended by their peers. We receive no compensation from placing advisors on our list, nor does an advisor's appearance on our list constitute an individual endorsement by Investopedia of such advisor.



[About Us](#)

[Editorial Policy](#)

[Privacy Policy](#)

[California Privacy Notice](#)

[Terms of Use](#)

[Advertise](#)

[Contact Us](#)

[Dictionary](#)

[News](#)

[Careers](#)

