

# WEALTH MANAGEMENT FIRMS

RANKED BY BAY AREA ASSETS UNDER MANAGEMENT

	Business name Website	Address Phone	Total Bay Area assets under management	Bay Area portfolio managers	Bay Area research analysts	Top local executive(s)
1	<b>Merrill Lynch Wealth Management</b> ml.com	555 California St. 9th Fl. San Francisco, CA 94104 415-676-2678	\$120.5 billion	NR	NR	Tracy Murphy, PWM SF market executive Marcel TenBerge, MLWM SF market executive
2	<b>First Republic Private Wealth Management</b> firstrepublic.com	111 Pine St. San Francisco, CA 94111 415-392-1400	\$77.6 billion	57	16	Robert Thornton, Executive VP and president
3	<b>UBS Global Wealth Management</b> financialservicesinc.ubs.com	555 California St. 32, 34, 46 Fl. San Francisco, CA 94014 415-398-6400	\$73.35 billion	184	NR	Erin Borger, Managing director/Market head, Northern California
4	<b>J.P. Morgan Private Bank</b> jpmorgan.com/pb	560 Mission St. 22nd Fl. San Francisco, CA 94105 415-315-8282	\$66.6 billion	NR	NR	Chris Brown, Executive director/Team lead David Lyon, Vice chair Verdi Di Sesa II, Executive, director/Market team lead <sup>1</sup>
5	<b>Kayne Anderson Rudnick Wealth Advisors</b> kayne.com	580 California St. #1750 San Francisco, CA 94104 800-231-7414	\$57.02 billion	11	6	Thomas Connaghan, Sr. wealth advisor
6	<b>Parnassus Investments</b> parnassus.com	1 Market St. #1600 San Francisco, CA 94105 415-778-0200	\$50.18 billion	10	18	Benjamin Allen, CEO
7	<b>Baker Street Advisors</b> bakerstreetadvisors.com	575 Market St. #600 San Francisco, CA 94105 415-344-6180	\$14.2 billion	8	5	Jeffrey Colin Michael van den Akker Christopher Wilkens, Partners
8	<b>Aspiriant LLC</b> aspiriant.com	50 California St. #2600 San Francisco, CA 94111 415-371-7800	\$13.89 billion	18	NR	Greg Schick, Director, wealth management Karen Blodgett, Chair of board/Partner
9	<b>Stifel</b> stifel.com	1 Montgomery St. #3700 San Francisco, CA 94104 415-364-6800	\$12.62 billion	NR	2	Thomas Weisel, Co-chairman
10	<b>Cerity Partners LLC</b> ceritypartners.com	345 California St. #1100 San Francisco, CA 94104 415-781-8535	\$9.19 billion	45	5	Kevin Dorwin, Partner/SF market leader
11	<b>Osterweis Capital Management</b> osterweis.com	1 Maritime Plz. #800 San Francisco, CA 94111 415-434-4441	\$7.34 billion	13	2	Carl Kaufman Catherine Halberstadt, Co-presidents/Co-CEOs
12	<b>Tiedemann Advisors</b> tiedemannadvisors.com	101 California St. #1200 San Francisco, CA 94111 415-449-1000	\$6.97 billion	7	4	Michael Yelverton, Managing director
13	<b>Parallel Advisors LLC</b> paralleladvisors.com	150 Spear St. #950 San Francisco, CA 94105 866-627-6984	\$5.44 billion	23	2	C.J. Rendic, CEO
14	<b>Bordeaux Wealth Advisors</b> bordeauxadvisors.com	1550 El Camino Real #100 Menlo Park, CA 94025 650-289-1105	\$4.11 billion	10	5	David Murdock Thomas Myers, Managing partners
15	<b>CIBC Private Wealth Management</b> wealth.us.cibc.com	3 Embarcadero Ctr. #1600 San Francisco, CA 94111 415-433-5844	\$4.02 billion	7	1	Richard Vandenberg, Managing director
16	<b>Wealthspire Advisors</b> wealthspire.com	100 Smith Ranch Rd. #300 San Rafael, CA 94903 415-526-2900	\$2.44 billion	14	5	Angela Giombetti, Head of marketing
17	<b>SVB Private</b> svb.com/private-bank	3003 Tasman Dr. Santa Clara, CA 95054 408-654-7400	\$2.32 billion	4	NR	John Longley, Head of private banking, wealth & trust
18	<b>Litman Gregory Welath Management LLC</b> lgam.com	900 Larkspur Landing Cir. #285 Larkspur, CA 94939 415-461-8999	\$2.15 billion	7	4	Gretchen Hollstein, Managing director/Sr. advisor Jeff Seeley, Deputy CEO/US COO/Head of US distributions Jennifer Ceccarelli, Director/COO/CCO
19	<b>Osborne Partners Capital Management LLC</b> osbornepartners.com	580 California St. #1900 San Francisco, CA 94104 415-362-5637	\$2.14 billion	3	3	Joe Conachy, Managing director Alicia Cheng, CCO/Principal Sonia Von Berg, COO/ Principal
20	<b>Evercore Wealth Management LLC</b> evercorewealthandtrust.com	425 California St. #1500 San Francisco, CA 94104 415-288-3000	\$2.14 billion	5	2	Keith McWilliams, Partner/ Head of SF office
21	<b>Summitry</b> summitry.com	919 E Hillsdale Blvd. #150 Foster City, CA 94404 6502122240	\$2.07 billion	3	6	Colin Higgins, CEO
22	<b>Ashfield Capital Partners LLC</b> ashfield.com	801 Montgomery St. #200 San Francisco, CA 94133 415-391-4747	\$1.6 billion	4	5	Peter Johnson, CEO/ Portfolio manager Adrian Fadrhonc, Chief compliance officer/Portfolio manager
23	<b>Maloon, Powers, Pitre &amp; Higgins LLC dba California Financial Advisors</b> calfinad.com	2303 Camino Ramon #230 San Ramon, CA 94583 925-275-1000	\$1.59 billion	10	NR	Michelle Perry Higgins, Principal
24	<b>Rebalance</b> rebalance360.com	530 Lytton Ave. #200 Palo Alto, CA 94301 650-396-3900	\$1.37 billion	4	2	Mitch Tuchman, Managing director
25	<b>Burton Enright Welch</b> bewinvest.com	1850 Mt. Diablo Blvd. #335 Walnut Creek, CA 94596 925-932-8010	\$1.34 billion	9	9	Jeremy Welch, Managing principal

**► CLOSER LOOK**

**\$900B**

Total assets under management for Ameriprise Financial Services, ranked as the #1 largest financial advisor firm in California by U.S. News & World Report. The Balance ranked BlackRock as the largest investment management company worldwide with \$9.5T total AUM.

**ABOUT THE LIST**

This List includes wealth management firms with offices in the Bay Area, which is defined as the counties of Alameda, Contra Costa, Marin, San Francisco and San Mateo. Information was obtained from firm representatives.

**NOTE:** We are no longer ranking by AUM for individuals in the Bay Area as we have done in previous years. We are now ranking by total Bay Area AUM.

**WANT TO BE ON THE LIST?**

If you wish to be surveyed when The List is next updated, or if you wish to be considered for other Lists, email your contact information to Ari Mahrer at amahrer@bizjournals.com.

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<sup>1</sup> Additional Top Bay Area executives include April Kupper, Managing director/Head of investments; and Matthew Barshied, Managing director/Market manager