

TOP
100
INDEPENDENT
ADVISORS

BARRON'S

WEALTH & ASSET MANAGEMENT GROUP

SEPTEMBER 14, 2026

GROWTH WAVE

Private equity is pouring billions into the wealth management industry, enabling big firms to gobble up smaller ones. What it means for clients.



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#1 for 5 Years (2017 - 2020, 2022)

Top 10 for 14th Consecutive Year (2013 - 2026)

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Barron's Top 100 Independent Advisors 2026 was awarded in September 2026 and covers the 2026 calendar year. KAR did not pay a fee to participate but did pay licensing fees to reprint and distribute the ranking results. Rankings from prior years apply only to the year awarded.

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DOW JONES

2026 Top 100 Independent Advisors

The following has been excerpted

By Matt Barthel

Barron's publishes four individual advisor rankings each year: Top 100 Advisors, Top 100 Women Advisors, Top 100 Independent Advisors, and Top 1500 Advisors. We also publish a firm ranking: Top RIA Firms, and two team rankings: Top Private Wealth Management Teams and Top Institutional Consulting Teams. The 2026 edition of the Institutional Consulting ranking will be its last.

The goal is to shine a spotlight on the nation's best financial advisors, with an eye toward raising standards in the industry. The rankings serve two distinct types of *Barron's* readers. For wealth management professionals, they act as an industry score card, indicating which firms have the people and the processes in place to attract clients and gather the most assets. For investors, the rankings are a tool that can help them find a

financial advisor who is right for them. We recommend selecting from advisors who have a typical account size close to your own portfolio to ensure you find an advisor set up to meet your needs.

Advisors who wish to be ranked must first pass a prequalification process aimed at ensuring that those in the mix are experienced and sophisticated advisors. Those who meet the criteria then fill out a survey with more than 100 questions about their practices.

We verify that data with the advisors' firms and with regulatory databases, then we apply our rankings formula to the data to generate a ranking. The formula features three major categories of calculations: 1) assets, 2) revenue, and 3) quality of practice.

In each of those categories, we do multiple subcalculations. For instance, we take into account not just the amount of assets an advisor manages, but also the type of

assets—are they private wealth assets or institutional? If they're institutional, are they for a foundation or an endowment, or are they corporate assets? We measure the growth of advisors' practices and their client retention. We also consider a wide range of qualitative factors, including the advisors' experience; their advanced degrees and industry designations; the size, shape, and diversity of their teams; their charitable and philanthropic work; and, of course, their compliance records.

The rankings are meant as a starting point for clients looking for an advisor—a first-pass vetting that can help investors narrow a search. Each advisor will have his or her own approach to investing, financial planning, and other services. Clients are encouraged to approach a search for an advisor the way they would a search for a doctor—interviewing multiple professionals and getting opinions from multiple third parties.



For the *Barron's* "Top 100 Independent Advisors" *Barron's* utilizes the results from a 102-question survey that is completed by advisors who wish to be ranked. *Barron's* verifies that data with the advisors' firms and with regulatory databases and then applies its rankings formula to the data to generate a ranking. The formula features three major categories of calculations: (1) Assets (2) Revenue (3) Quality of practice. *Barron's* also measures the growth of advisors' practices and their client retention along with a wide range of qualitative factors, including the advisors' experience, their advanced degrees and industry designations, the size, shape, and diversity of their teams, their charitable and philanthropic work and their compliance records. KAR has not paid a fee to participate in the rankings but has paid fees for a license to reprint and distribute the results of the rankings.