

BARRON'S

THE DOW JONES BUSINESS AND FINANCIAL WEEKLY

www.barrons.com

MARCH 6, 2017

AMERICA'S TOP 1,200 FINANCIAL ADVISORS



The Trump administration injects opportunity and risk into an already challenging investing climate. Here's how the nation's best guide their clients through it all.

**Barron's
Annual Ranking,
Covering All
50 States**

Brian Stauffer for Barron's

Barron's Top 1,200 Financial Advisors

Rankings based on assets under management, revenue generated for advisors' firms, quality of practices, and other factors. N=new.

RANK 2017 '16	Name	Firm	City	CUSTOMERS						Total Assets (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)
				Individuals (Up to \$1 mil)	High Net Worth (\$1-10 mil)	Ultra-High Net Worth (\$10 mil+)	Founda- tions	Endow- ments	Institu- tional			
TEXAS												
23. 30.	Bonner Barnes	Corda Investment Mgmt	Houston	•	•					815	0.75	1.5

(over please)

THE PUBLISHER'S SALE OF THIS REPRINT DOES NOT CONSTITUTE OR IMPLY ANY ENDORSEMENT OR SPONSORSHIP OF ANY PRODUCT, SERVICE, COMPANY OR ORGANIZATION.
Custom Reprints 800.843.0008 www.djreprints.com DO NOT EDIT OR ALTER REPRINT/REPRODUCTIONS NOT PERMITTED 53442

Talented and trusted advisors are especially valuable during uncertain times such as these.

The Top 1,200 Advisors

By Steve Garmhausen

The following has been excerpted

November's election results have spurred opportunities, risks, and plenty of intense emotion—and the best advisors are guiding clients through it all without missing a beat.

This challenging environment is the type in which Barron's Top 1,200 Financial Advisors really earn their keep. Their combination of investing prowess and soft skills enables them to see what's important, cut through the emotion, and reassure clients.

Most advisors are optimistic about the economy and markets. Yet they see market volatility ahead—due to headlines from Washington, for sure, but also because of interest-rate increases and heightened valuations within the aging bull market.

Our Top 1,200 ranking draws from all 50 states, plus the District of Columbia, and it's the largest, most comprehensive of the annual advisor listings that we run. It includes a cross-section of private-wealth advisors—from independents who own and operate their own practices to advisors from the large Wall Street firms.

This special report lists the top advisors in each state, with the number of ranking spots determined by each state's population and wealth. The rankings are based on assets under management, revenues generated by advisors for their firms, and the quality of the advisors' practices. Investment performance is not an explicit criterion because performance is often a function of each client's appetite for risk. In evaluating advisors, we exam-

ine regulatory records, internal company documents, and 100-plus points of data provided by the advisors themselves.

Our advisors play a critical role in helping clients from across the wealth spectrum to achieve goals ranging from a comfortable retirement to giving away fortunes.

Our Top 1,200 advisors are a seasoned bunch—their average age is nearly 55, and they've spent almost 29 years in the industry. They oversee a ton of money—the typical team manages about \$2.3 billion from 518 households.

The best advisors, unsurprisingly, enjoy a loyal clientele. Indeed, the annual client-retention rate among our Top 1,200 is about 98%. That fealty isn't earned just through investment success. ■



CORDA

TOGETHER WE'RE INVESTED

713.439.0665 | cordamanagement.com