



2020 TOP ADVISOR RANKING

Rankings are based on assets under management, revenue generated for advisors' firms, and a variety of quality-of-practice measures, including advisors' compliance records.

Rank		Name	Firm	City	Customers						Total Assets (\$mil)	Typical Account (\$mil)	Typical Net Worth (\$mil)
2020	2019				Individuals (Up to \$1 mil)	High Net Worth (\$1-10 mil)	Ultrahigh Net Worth (\$10 mil+)	Foundations	Endowments	Institutional			
16.	22.	Bonner Barnes	Corda Investment Mgmt	Houston	•	•					1,163	0.85	2

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AMERICA'S TOP 1200 FINANCIAL ADVISORS 2020

The following has been excerpted

By Steve Garmhausen

In selecting our Top 1,200 advisors each year, Barron's aims to pinpoint those who already provide exceptional client care. The group this year is a little grayer but more prosperous than it was five years ago. The average age of the advisors on our list has climbed to 55 from 54, while the client assets managed by their teams have grown 24% since 2016, to an average of \$2.8 billion.

What hasn't changed is the Top 1,200's

client-retention rate: It has held steady through the years at 98%. Our 2020 ranking features nearly 200 advisors who weren't on last year's list.

The Top 1,200 are drawn from all 50 states, plus the District of Columbia. This ranking is the largest and most comprehensive of the annual Barron's advisor listings. 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 isn't an explicit criterion because performance is often a function of each client's appetite for risk. In evaluating advisors, we examine regulatory records, internal company documents, and 100-plus points of data provided by the advisors themselves.



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