

WEALTH MANAGEMENT FIRMS															
Ranked by assets managed locally for fiscal year 2018															
Rank	Company Address Website Phone	Total assets managed: 2018 2017 % + (-)	Services					Compensation			Min. investment account: Individual Institution	# of local portfolio managers or investment advisers	Top local exec.(s) CIO Year est. locally		
			Financial planning	Brokerage services	Asset management	Estate planning	Life insurance/risk mgmt.	Other	Hourly	Commissions				Fixed fee	Performance-based fees
1 (2)	Morgan Stanley 101 W. Broadway, Suite 1800, San Diego 92101 www.morganstanley.com 800-473-1331	\$28B \$27B 2	Y	Y	Y	Y	Y	N	N	Y	Y	N	wnd wnd	213	David Bigler wnd
2 (1)	Brandes Investment Partners L.P. 11988 El Camino Real, Suite 600, San Diego 92130 www.brandes.com 858-755-0239	\$24B \$31B (23)	N	N	Y	N	N	N	N	N	N	N	\$100,000(1) \$10,000,000	17	Brent Woods Kenneth Little 1974
3 (4)	Chandler Asset Management Inc. 6255 Lusk Blvd., San Diego 92121 www.chandlerasset.com 800-317-4747	\$17B \$14B 21	N	N	Y	N	N	N	N	N	N	N	\$250,000 \$10,000,000	11	Kay Chandler Martin Cassell 1988
4 (3)	UBS Financial Services Inc. 1200 Prospect St., Suite 100, La Jolla 92037 www.ubs.com 858-454-9181	\$13B \$15B (7)	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	\$1,000,000 wnd	99	Chris Marsh Michael Ryan 2001
5 (5)	Northern Trust 4747 Executive Drive, Suite 1100, San Diego 92121 www.northerntrust.com 858-824-1200	\$4B \$4B 7	Y	Y	Y	Y	Y	Y	N	N	Y	N	\$5,000,000 \$20,000,000	6	Paul Thiel Robert Browne 1989
6 (NR)	LM Capital Group LLC 750 B St., Suite 3010, San Diego 92101 www.lmcapital.com 619-814-1401	\$4B \$5B (13)	N	N	Y	N	N	N	N	N	N	N	\$20,000,000 \$20,000,000	5	Luis Maizel John Chalker 1989
7 (6)	Dowling & Yahnke 12265 El Camino Real, Suite 300, San Diego 92130 www.dywealth.com 858-509-9500	\$4B \$4B (3)	N	N	Y	N	N	N	N	N	N	N	\$1,000,000 \$2,000,000	13	Dale E. Yahnke Will G. Beamer 1991
8 (NR)	AdvicePeriod 2707 High Bluff Drive, Suite 200, San Diego 92130 www.adviceperiod.com 424-281-3600	\$3B \$2B 29	Y	N	Y	Y	N	N	N	N	Y	N	\$500,000 \$0	5	Ryan Goldenhar Jackie Lewis Nathan Sonnenberg 2018
9 (8)	Pure Financial Advisors Inc. 3131 Camino del Rio N., Suite 1550, San Diego 92108 www.purefinancial.com 619-814-4100	\$2B \$2B 4	Y	N	Y	N	N	N	N	N	Y	N	\$0 \$0	28	Michael Fenison Ben Litman 2007
10 (9)	HoyleCohen LLC 9350 Waxie Way, Suite 500, San Diego 92123 www.hoylecohen.com 858-576-7300	\$2B \$2B (1)	Y	N	Y	Y	Y	N	N	N	Y	N	\$500,000 \$500,000	13	Mark Delfino Vanessa Wieliczko 2001
11 (10)	CoastEdge Partners LLC 888 Prospect St., Suite 220, La Jolla 92037 www.coastedge.com 858-997-2777	\$1B \$1B (1)	N	N	Y	N	N	N	N	N	Y	N	\$5,000,000 \$5,000,000	5	Steve Simpson Rich Effress 2017
12 (12)	Reilly Financial Advisors 7777 Alvarado Road, Suite 116, La Mesa 91942 www.rfawealth.com 619-698-0794	\$1B \$1B 7	Y	N	Y	N	N	N	N	N	N	N	\$350,000 wnd	20	Frank Reilly 1999
13 (11)	Lucia Wealth Services LLC 13520 Evening Creek Drive N., Suite 300, San Diego 92128 www.luciacap.com 800-644-1150	\$1B \$1B (6)	Y	N	N	N	N	N	Y	N	Y	N	\$108,391 \$0	23	Raymond Lucia Mark Scalzo 2010
14 (14)	U.S. Bank 4747 Executive Drive, Third Floor, San Diego 92121 www.usbank.com 858-334-0750	\$1B \$987M 26	Y	N	Y	Y	Y	N	N	N	N	N	\$3,000,000 \$0	16	Scott Schmid Eric Freedman 1999
15 (13)	HighTower San Diego 12680 High Bluff Drive, Suite 450, San Diego 92130 www.hightowersandiego.com 858-356-6340	\$1B \$1B 6	Y	N	Y	Y	Y	Y	N	N	Y	N	\$5,000,000 \$10,000,000	3	Drew Nordlicht David Molnar 2012
16 (17)	Weatherly Asset Management 832 Camino del Mar, Suite 4, Del Mar 92014 www.weatherlyassetmgt.com 858-259-4507	\$760M \$735M 4	Y	N	Y	Y	Y	N	N	N	Y	N	\$1,000,000 \$1,000,000	5	Carolyn Taylor Carolyn Taylor 1994
17 (19)	Aspiriant 201 Lomas Santa Fe Drive, Suite 360, Solana Beach 92075 www.aspiriant.com 858-755-8899	\$699M \$620M 13	Y	N	Y	Y	Y	Y	Y	N	Y	N	\$1,500,000 \$1,500,000	7	Mark Petrie John Allen 1987
18 (NR)	Mariner Wealth Advisors 11512 El Camino Real, Suite 370, San Diego 92130 www.marinerwealthadvisors.com 858-795-2000	\$623M \$569M 9	Y	N	Y	Y	Y	Y	N	N	N	N	\$0 \$0	12	Kyle Quinn Katrina Scott 2011
19 (20)	Blankinship & Foster LLC 420 Stevens Ave., Suite 250, Solana Beach 92075 www.bfadvisors.com 858-755-5166	\$504M \$529M (5)	Y	N	Y	N	N	N	N	N	Y	N	\$1,000,000 \$1,000,000	7	Stefan Prvanov Mengxi (Monica) Ma 1974
20 (21)	EP Wealth Advisors(2) 5151 Shoreham Place, Suite 270, San Diego 92122 www.epwealth.com 858-622-9009	\$413M \$405M 2	Y	N	Y	N	N	Y	N	N	Y	N	\$500,000 \$1,000,000	5	Richard Donnelly Kevin Ashworth 2000
21 (22)	Rowling & Associates 8889 Rio San Diego Drive, Suite 202, San Diego 92108 www.rowling.com 619-295-0200	\$360M \$327M 10	Y	N	Y	N	N	Y	N	N	Y	N	\$0 \$0	3	Sheryl Rowling Sheryl Rowling 1987
22 (NR)	Clelland & Co. Inc. 5151 Shoreham Place, Suite 130, San Diego 92122 www.clelland.com 858-587-8700	\$308M \$346M (11)	Y	N	Y	Y	N	N	N	N	Y	N	\$500,000 \$1,000,000	3	Robert Clelland Matthew Medeiros 1989
23 (NR)	AlphaCore Capital 875 Prospect St., Suite 315, San Diego 92037 www.alphacorecap.com 858-875-4100	\$285M \$233M 22	Y	N	Y	Y	N	Y	N	N	N	N	\$500,000 \$5,000,000	5	Dick Pfister 2015
24 (NR)	Sage Capital Advisors LLC 5672 La Jolla Blvd., La Jolla 92037 www.sage-cap.com 858-459-0172	\$276M \$250M 10	N	N	Y	N	N	Y	Y	N	Y	N	\$100,000 \$300,000	5	Diana Blair Matt Johnson 2005
25 (24)	American Money Management P.O. Box 675203, Rancho Santa Fe 92067 www.amminvest.com 858-755-0909	\$275M \$265M 4	Y	N	Y	Y	N	Y	N	N	N	Y	\$100,000 \$100,000	7	Gabriel Wisdom Michael Moore 1999
26 (27)	Beta Wealth Group 11421 W. Bernardo Court, San Diego 92127 www.betawealthgroup.com 858-207-3377	\$273M \$230M 19	Y	Y	Y	Y	Y	N	Y	N	Y	N	\$0 \$0	4	Jodi Vleck Giri Krishnan 2009
27 (26)	Aldrich Wealth LP 5946 Priestly Drive, Suite 200, Carlsbad 92008 www.wealthadvisors.com 760-431-8440	\$243M \$236M 3	Y	N	Y	N	N	Y	Y	N	Y	N	\$150,000 \$1,000,000	4	Carl Pinkard Darin Richards 2000

28 (31)	Marine Street Financial 7825 Fay Ave., Suite 240, La Jolla 92037 www.marinestreetfinancial.com 858-754-3501	\$215M \$175M 23	Y	Y	Y	Y	Y	Y	N	N	N	N	\$100,000 \$500,000	4	Perry Bacon Daniel Racicot 2013
29 (NR)	Financial Alternatives Inc. 7825 Fay Ave., Suite 210, La Jolla 92037 www.financialalternatives.com 858-459-8289	\$205M \$200M 2	Y	N	Y	N	N	N	Y	N	Y	N	\$2,000,000 \$2,000,000	3	Jim Freeman Chris Jaccard 1991
30 (30)	Pacific Wealth Management LLC 11512 El Camino Real, Suite 350, San Diego 92130 www.pacwealth.com 858-509-9797	\$173M \$183M (6)	Y	Y	Y	N	Y	N	N	N	N	N	\$500,000 wnd	4	James Kuntz 1998
31 (29)	Silvercrest Asset Management Group⁽³⁾ 4250 Executive Square, Suite 545, La Jolla 92037 www.silvercrestgroup.com 858-352-3510	\$168M \$184M (8)	N	N	Y	N	N	N	N	N	N	N	\$5,000,000 \$5,000,000	4	Christopher Richey 2004
32 (NR)	Platt Wealth Management 3838 Camino del Rio North, Suite 365, San Diego 92108 www.plattwm.com 619-255-9554	\$165M \$0 0	N	N	Y	N	N	N	Y	N	Y	N	\$1,000,000 wnd	2	Jeff Platt 2018
33 (NR)	Silvia McColl Wealth Management LLC 402 W. Broadway, Suite 2100, San Diego 92101 www.silviamccoll.com 619-637-9920	\$155M wnd wnd	N	N	Y	N	N	N	N	N	N	N	\$500,000 \$2,000,000	2	William McColl Brandon Silvia 2018
34 (NR)	Rice Hall James & Associates LLC 600 W. Broadway, Suite 1000, San Diego 92101 www.ricehalljames.com 619-239-9005	\$152M \$187M (18)	N	N	Y	N	N	N	N	N	N	Y	\$5,000,000 \$5,000,000	7	Thomas McDowell Thomas McDowell 1974
35 (NR)	Tidemark Financial Partners 5405 Morehouse Drive, Suite 45, San Diego 92121 www.tidemarkfp.com 858-925-8000	\$125M \$110M 14	Y	Y	Y	Y	Y	N	Y	Y	Y	N	wnd wnd	6	Tyler Abney 2017
36 (35)	D'Arcy Capital 12625 High Bluff Drive, Suite 314, San Diego 92130 www.darcycapital.com 858-914-1133	\$100M \$104M (4)	N	N	Y	N	N	N	N	N	N	N	\$500,000 \$1,000,000	2	Brett D'Arcy Brett D'Arcy 2011
37 (36)	Zeit Capital Advisors 10755 Scripps Poway Parkway, Suite 429, San Diego 92131 www.zeitcapital.com 206-713-9655	\$92M \$94M (2)	Y	N	Y	N	N	N	Y	N	N	N	\$100,000 \$100,000	1	Phillip J Weber 2015
38 (38)	Bradley Wealth Management LLC 350 Tenth Ave., Suite 1000, San Diego 92101 bradleywealth.com 619-512-4100	\$89M \$80M 12	Y	N	Y	N	Y	Y	N	N	Y	N	\$250,000 \$250,000	3	Michael Bradley Michael Bradley 2009
39 (NR)	Nerad + Deppe Wealth Management 8910 University Center Lane, Suite 645, San Diego 92122 www.nd-wm.com 858-457-1325	\$67M \$60M 12	N	N	Y	N	N	N	N	N	Y	N	\$250,000 wnd	2	Richard Nerad Steven Deppe 2009
40 (NR)	Zenith Investment Management 9920 Pacific Heights Blvd., Suite 150, San Diego 92122 www.zenithim.com 858-716-7500	\$20M \$15M 33	Y	N	Y	N	N	Y	Y	N	Y	Y	\$500,000 \$750,000	2	Jacob Chaparro Jacob Chaparro 2017
NR (NR)	Madison Avenue Securities LLC 15050 Avenue of Science, San Diego 92128 www.mas-bd.com 888-627-7323	wnd wnd wnd	N	Y	Y	N	Y	Y	Y	Y	Y	N	wnd wnd	15	Martin McNees Robert Seawright 2005

(NR) Not ranked

wnd Would not disclose

Sources: The firms and CPA/CFO-attested statements.

To the best of our knowledge, this information is accurate as of press time. While every effort is made to ensure the accuracy and thoroughness of the list, omissions and typographical errors sometimes occur. Please send corrections or additions to the Research Department at the San Diego Business Journal. 619-802-8456. This list may not be reprinted in whole or in part without prior written permission from the editor. Some

companies have declined to participate or did not return a survey by press time. It is not the intent of this list to endorse the participants or to imply a firm's size or numerical rank indicates its quality.

(1) Through approved programs.

(2) Listed last year as Donnelly Wealth Advisors

(3) Listed last year as Neosho Capital LLC

Courtney Shamrell