

ARS Wealth Advisors: Awards Criteria

Top Wealth Manager Award: To be eligible for “Top Wealth Manager” designation, a firm must be a registered investment advisor (RIA) and also offer financial planning services. In addition, fifty percent of the firm’s clients must fit the SEC definition for individuals or high net worth individuals. The firms are then ranked by average assets under management (AUM) per client. Firms do not pay a fee to participate in Wealth Manager’s listing.

Financial Advisor Top Firm Award: The publication’s RIA ranking is for independent advisory firms that offer financial planning and related services along with investment management. The RIA rankings are based on total AUM or Assets Under Management.