

METHODOLOGY

# Best Financial Advisory Firms 2026

in cooperation with



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# USA TODAY's Best Financial Advisory Firms ranking sheds light on the complex market by **highlighting leading firms** and their **trusted financial guidance**

Ranking's cornerstones



## Relevance of Ranking

The U.S. **financial advisory industry** plays a critical role in helping individuals, families, and institutions navigate increasingly complex markets. Amid **market volatility and the large number of advisory firms**, those seeking advice and investment guidance face **growing difficulty identifying firms** that combine performance, trust, and long-term stability. By integrating **reputation and business momentum**, the ranking provides a clear and **credible overview of the most trusted and high-performing firms** in the U.S.



## Executive Summary

- **Title of ranking:** Best Financial Advisory Firms 2026
- **Media partner:** USA TODAY
- **Edition:** 4<sup>th</sup>
- **Number of awardees:** 1,000
- **Methodology:** The ranking is based on recommendations from clients, industry experts, and financial advisors, and on the firm's development in assets under management (AUM)
- **Criteria used for determining rank:** To be eligible, firms must be registered as an investment advisory firm (RIA firm) with the SEC and/or at state level for at least one year, maintain a principal office in the United States, have a clean disciplinary record, provide financial planning or portfolio management services to individuals and/or small businesses, and manage more than \$500,000 in AUM

# The ranking is based on a **scoring model** that includes **client and peer recommendations** and **AUM development**

## Scoring Model



# Introducing the **rising stars ranking**: Spotlighting **50 rising financial advisory firms** driving early growth and client recognition

Special Awards



## Rising Stars

Alongside the 4th edition of the list of the 1,000 best financial advisory firms, Statista and USA TODAY are, for the **first time**, also publishing a **“Rising Stars” ranking** highlighting **50 firms** that have demonstrated **growth and momentum in their early years of operation** and have already **earned recognition** among clients and peers


### Ranking’s cornerstones

- Same eligibility criteria as main list, with **additional requirement: registration** as an RIA firm with the SEC or at the state level **must have occurred on or after January 1, 2023**
- Slightly adapted scoring model: long-term AUM development is excluded and **replaced by mid-term AUM development**, measured over the past three years (2023–2026), to better capture **recent firm momentum and performance**




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# Legal disclaimer for the Best Financial Advisory Firms rankings

## Disclaimer

The rankings are comprised exclusively of advisory firms that are eligible regarding the scope described in this document. A mention in the rankings is a positive recognition based on client and peer recommendations and data points collected from publicly available sources at the time. The rankings are the result of an elaborate process which, due to the interval of data-collection and analysis, is a reflection of the past years. Furthermore, events preceding or following the 02/11/2026 were not included in the metrics. As such, the results of these rankings should not be used as the sole source of information for future deliberations. The information provided in these rankings should be considered in conjunction with other available information about advisory firms. The quality of advisory firms that are not included in the rankings is not disputed.