

METHODOLOGY

Best Financial Advisory Firms 2026

in cooperation with



February 2026



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:** 4th
- **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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About Statista R

statista  is a **world leader** in the creation of company, brand, and product **rankings and top lists**, based on comprehensive market research and data analysis: **Statista R recognizes the best**. With a team of over **100 expert analysts** and in cooperation with more than **45 high profile media brands** across all continents, Statista R creates **transparency for consumers and business decision makers** and helps companies build trust and recognition across a plethora of industries and product categories.

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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.

METHODOLOGY

Best **Financial Advisory** **Firms** 2025

USA TODAY'S "Best Financial Advisory Firms" is based on the analysis of a firm's performance and market appreciation

Summary

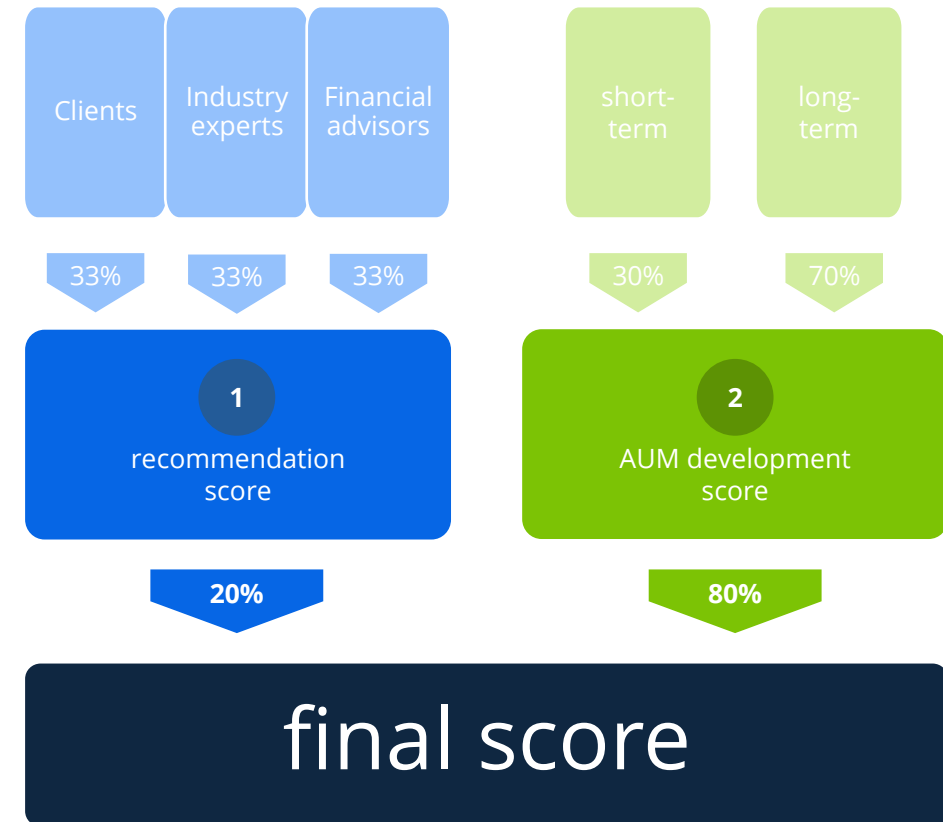
- For the third time, USA TODAY and Statista are awarding the "**Best Financial Advisory Firms**" in the US.
- The ranking of the best **registered investment advisory firms** ("RIA Firms") is based on two dimensions: **recommendations** by clients, industry experts and financial advisors and a firm's **development of Assets under Management** (AUM).
- Research and evaluation process:
 - **Recommendations** were collected via an independent survey among over 30,000 individuals. **Clients, industry experts** and **financial advisors working for an RIA firm** could recommend the RIA firms they find commendable. Self-recommendations were prohibited and were therefore not included in the evaluation.
 - **AUM development** was analyzed both in the short- and long-term using publicly available data. **Short-term AUM development** was calculated over a twelve-month period from January 2024 to January 2025, while **long-term development** spanned a five-year period from 2020 to 2025.
 - The final score was calculated by **weighting recommendations at 20%** and **AUM development at 80%**. Within the AUM growth metric, short-term and long-term growth were each weighted 30/70.

The 500 RIA firms with the highest score were awarded as USA TODAY's *Best Financial Advisory Firms*

The final score is derived from a 20/80 weighting of recommendations and development of assets under management

Scoring Model

- Through various channels, financial advisors working for an RIA firm, as well as their clients and industry experts were invited to participate in the surveys by USA TODAY and Statista.
- Based on the results of the surveys a **recommendation score*** was calculated for each firm, contributing 20% to the final score.
- Leveraging data from the SEC IAPD regulatory database up to January 2025, short-term (twelve-month period) and long-term (five-year period) Assets under Management (AUM) development were analyzed and weighted at a ratio of 30/70 to calculate an **AUM development score**, accounting for 80% of the final score.
- The final score was calculated as follows:
 $20\% \times \text{recommendation score} + 80\% \times \text{AUM development score} = \text{final score}$



The 500 RIA firms with the best overall score were awarded

Requirements

To be recognized as one of USA TODAY's Best Financial Advisory Firms the following requirements had to be met:



1. The firm is registered as an RIA firm with the SEC or at state level for at least one year
2. The firm has a principal office in the United States
3. The firm has a clean disciplinary record
4. The firm offers financial planning services or portfolio management for individuals and/or small businesses
5. The firm's AUM must be greater than \$500,000
6. The firm achieved an overall score among the top 500

Disclaimer

The selection of the firms and the definition of the evaluation criteria were based on independent journalistic criteria of USA TODAY and Statista. The evaluation was carried out by the statistics and market research company Statista. USA TODAY and Statista make no claim to the completeness of the firms examined.

The ranking only includes firms that qualify according to the criteria described in this document. A position in the ranking is a positive recognition based on research of publicly available data sources at the time and extensive surveys.

In addition, events after February 13, 2025 were no longer considered in the analysis. As such, the results of this list should not be used as the sole source of information for future deliberations. The information provided through this top list should rather be considered in conjunction with other available information about a financial advisory firm.

The quality of financial advisory firms that are not included in the ranking is not disputed.