

# THE LIST

## Largest Locally Owned Independent Wealth Management Firms

Ranked by assets managed during most recent fiscal year. Dollars in millions.

RANK	COMPANY ADDRESS, CITY/ZIP FINANCIAL SERVICES	PHONE FAX	WEBSITE EMAIL	MANAGED ASSETS		ACCOUNTS		RANGE OF INVESTMENT ADVISORY CLIENTS 2019 2018	PRINCIPAL TITLE/S YEAR ESTABLISHED
				2019	% CHANGE	2019	% CHANGE		
				2018		2018			
1	<b>Cabana Asset Management</b> 220 S. School Ave., Fayetteville 72701 wealth management, portfolio construction and retirement plan solutions for individuals, small businesses, and financial advisers across the country	479-442-6464 NA	www.thecabanagroup.com info@thecabanagroup.com	\$965.1 \$608.0	58.7%	10,352 5,949	74.0%	More than 7,000 More than 3,500	Chadd Mason Co-founder/CEO 2007
2	<b>Greenwood Gearhart Inc.</b> 26 E. Center St., Fayetteville 72701 wealth management and financial planning for high-net-worth individuals and corporations	479-521-5353 479-521-5300	www.greenwoodgearhart.com info@greenwoodgearhart.com	\$485.0 \$460.0	5.4%	1,375 983	39.9%	More than 100 More than 100	G. Brock Gearhart President 1982
3	<b>WealthPath Investment Advisors</b> 5305 Village Parkway, Suite 5, Rogers 72758 portfolio management for individuals, employer-sponsored retirement plans, foundations and trusts	479-845-6220 479-845-6226	www.wealthpath.net clay@wealthpath.net	\$481.0 \$463.5	3.8%	1,970 1,760	11.9%	More than 1,000 More than 1,000	Clay Kendall, Jim Edmiaston, Erik Berry and Jim Mote Partners 2011
4	<b>The Point Financial Group Inc.</b> 6576 Lynch's Prairie Cove, Suite A, Springdale 72762 financial planning and investments, employer-sponsored retirement plans, foundations and trusts	479-872-9998 479-872-2614	www.pointfg.com jim.blount@pointfg.com	\$367.4 \$347.7	5.7%	1,468 1,378	6.5%	More than 1,000 750-1,000	Jim Blount President/CEO 2001
5	<b>Garrison Asset Management LLC</b> 605 W. Dickson St., Suite 201, Fayetteville 72701 portfolio and wealth management for individuals, small businesses and foundations	479-587-1045 479-587-1257	www.garrisonassetmanagement.com kbradley@garrisonfinancial.com	\$331.3 \$343.7	-3.6%	680 678	0.3%	More than 100 More than 100	Kerry Bradley President 1988
6	<b>Wilson Coker Wealth Advisors</b> 3704 W. Southern Hills Blvd., Suite 200, Rogers 72758 financial planning and wealth management for individuals and/or small businesses	479-755-2050 479-316-4150	www.wilsoncoker.com jonathan.coker@raymondjames.com	\$288.0 \$112.0	157.1%	1,500 307	388.6%	More than 500 More than 100	Kevin Wilson, Jonathan Coker Partners 2015
7	<b>Boston Mountain Money Management</b> 5414 Pinnacle Point Drive, Rogers 72758 investments, financial planning	497-899-5315 NA	www.bostonmmm.com info@bostonmmm.com	\$115.0 \$94.5	21.7%	362 309	17.2%	More than 100 NA	Scott Alaniz Principal 2007
8	<b>Integrity Capital Wealth Management LLC</b> 4201 W. New Hope Road, Suite 102, Rogers 72758 investments, financial planning	479-878-8126 479-878-1013	www.integritycapital.com brian@integritycapital.com	\$110.2 \$94.4	16.7%	535 419	27.7%	More than 100 More than 100	Brandon Simmons Founder/CEO 2004
9	<b>Sphere Wealth Management</b> 3900 N. Front St., Suite 105, Fayetteville 72703 financial planning and investment management	479-435-6625 NA	www.spherewealth.com don.paul@spherewealth.com	\$55.0 \$38.5	42.9%	485 300	61.7%	More than 100 More than 100	John Paul, Don Paul, Keith Lea Partners 2015
Totals				\$3,198.0 \$1,954.3	63.6%	18,727 6,134	205.3%		

Notes: Bank-based SEC-registered advisers excluded. NA – Not available.

Source: U.S. Securities and Exchange Commission and the firms.

Research by Paul Gatling



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