

# MONEY MANAGERS IN TARRANT COUNTY (1-33)

Ranked by most recent regulatory assets under management (Form ADV).

|    | Company Name/Website                                                            | Address                                                     | Most Recent ADV Filing Date | Most Recent Assets Managed | Total Accounts | Investment Advisory Employees | Top Local Executive and Title                                                           |
|----|---------------------------------------------------------------------------------|-------------------------------------------------------------|-----------------------------|----------------------------|----------------|-------------------------------|-----------------------------------------------------------------------------------------|
| 1  | TPG Global Advisors<br>tpg.com                                                  | 301 Commerce Street, Ste. 3300<br>Fort Worth, TX 76102      | 04/29/2026                  | \$309 billion              | 394            | 1,798                         | Jon Winkelried, CEO/Director                                                            |
| 2  | Jasper Ridge Partners, L.P.<br>jasperidge.com                                   | 201 Main Street, Ste. 1000<br>Fort Worth, TX 76102          | 03/31/2026                  | \$43.0 billion             | 67             | 145                           | Cori Duncan, CEO/Managing Partner                                                       |
| 3  | Luther King Capital Management Corporation<br>lkcm.com                          | 301 Commerce Street, Ste. 1600<br>Fort Worth, TX 76102      | 06/27/2025                  | \$30.1 billion             | DND            | 73                            | J. Luther King Jr., Founder/President                                                   |
| 4  | First Command Advisory Services<br>firstcommand.com                             | 1 Firstcomm Plaza<br>Fort Worth, TX 76109                   | 03/27/2026                  | \$24.4 billion             | 113,591        | 1,787                         | Mark Steffe, President and CEO                                                          |
| 5  | Crescent Real Estate LLC<br>crescent.com                                        | 3230 Camp Bowie Blvd., Ste. 500<br>Fort Worth, TX 76107     | 03/31/2026                  | \$5.1 billion              | 43             | 113                           | Conrad Suszynski, CEO                                                                   |
| 6  | Summittx Capital, L.P.<br>summittxcapital.com                                   | 201 Main Street, Ste. 1900<br>Fort Worth, TX 76102          | 04/30/2026                  | \$3.4 billion              | DND            | 80                            | Caroline Cooley, CEO/C-CIO, and Neilson Arbour, Co-CIO                                  |
| 7  | Gauge Capital<br>gaugecapital.com                                               | 1256 Main Street, Ste. 256<br>Southlake, TX 76092           | 03/31/2026                  | \$3.4 billion              | 10             | 67                            | Tom Mckelvey, Co-Founder/Managing Partner;<br>Drew Johnson, Co-Founder/Managing Partner |
| 8  | Leo Wealth, LLC<br>leowealth.com                                                | 860 Airport Freeway, Ste. 402<br>Hurst, TX 76054            | 03/17/2026                  | \$3.2 billion              | 5,195          | 43                            | Jessica Cutrera, Harmen Overdijk, Co-CEOs                                               |
| 9  | Tailwind Advisors<br>tailwindadvisors.com                                       | 1320 S. University Drive, Ste. 701<br>Fort Worth, TX 76107  | 03/24/2026                  | \$1.7 billion              | 21             | 12                            | John Batton, CIO/Principal                                                              |
| 10 | WPWealth LLP<br>wpwealth.com                                                    | 640 Taylor Street, Ste. 2200<br>Fort Worth, TX 76102        | 03/30/2026                  | \$1.2 billion              | 1,622          | 14                            | Bill Weston, Bryan McClune, Partners                                                    |
| 11 | Holt Capital Partners, L.P.<br>holtcap.com                                      | 301 Commerce Street, Ste. 1430<br>Fort Worth, TX 76102      | 03/26/2026                  | \$1.1 billion              | 142            | 6                             | Robert M. Holt Jr., Managing Partner                                                    |
| 12 | Rogers Wealth Group, Inc..<br>rogers401k.com                                    | 1330 Summit Avenue<br>Fort Worth, TX 76102                  | 03/17/2026                  | \$1.0 billion              | 876            | 21                            | Craig Rogers, CEO                                                                       |
| 13 | Bentoak Capital<br>bentoakcapital.com                                           | 201 Ft. Worth Hwy.<br>Weatherford, TX 76086                 | 03/31/2026                  | \$970 million              | 2,039          | 20                            | Brandon Garrett, CEO                                                                    |
| 14 | Gerald Baker Financial Group DBA Baker Financial Services<br>bakerfinancial.net | 1415 West Randol Mill Rd.<br>Arlington, TX 76012            | 02/19/2026                  | \$909 million              | 1,347          | 7                             | Gerald Baker, President                                                                 |
| 15 | Insight Equity Management Company LLC<br>insightequity.com                      | 1400 Civic Place, Ste. 250<br>Southlake, TX 76092           | 03/30/2026                  | \$886 million              | 18             | 21                            | Ted Beneski, CEO/Managing Partner                                                       |
| 16 | Alta Fox Capital Management, LLC<br>altafoxcapital.com                          | 640 Taylor Street, Ste. 2522<br>Fort Worth, TX 76102        | 03/31/2026                  | \$821 million              | 2              | 8                             | Connor Haley, Managing Member/Founder                                                   |
| 17 | Signal Securities, Inc..<br>signalsecurities.com                                | 700 Throckmorton<br>Fort Worth, TX 76102                    | 03/04/2026                  | \$679 million              | 1,920          | 35                            | Chris Snow, CEO                                                                         |
| 18 | St. James Investment Company, LLC<br>stjic.com                                  | 535 S. Kimball Avenue, Ste. 140<br>Southlake, TX 76092      | 03/02/2026                  | \$661 million              | 1,049          | 6                             | Robert Mark, Founder                                                                    |
| 19 | Aspen Wealth Management, LLC<br>aspenwealthmgmt.com                             | 4200 S. Hulen Street, Ste. 422<br>Fort Worth, TX 76109      | 04/13/2026                  | \$658 million              | 1,121          | 9                             | Helen Stephens, CEO/President                                                           |
| 20 | Trinity Investors Fund Advisors, LLC<br>trinityinvestors.com                    | 2102 E. State Hwy 114, Ste. 300<br>Southlake, TX 76092      | 04/30/2026                  | \$607 million              | 56             | 4                             | Daniel Meader, Sanjay Chandra, Managing Partners                                        |
| 21 | Mills Wealth Advisors, LLC<br>millswealthadvisors.com                           | 1207 S. White Chapel Blvd., Ste. 150<br>Southlake, TX 76092 | 03/25/2026                  | \$549 million              | 1,877          | 8                             | Michael Mills, Managing Principal                                                       |
| 22 | Trinity Portfolio Advisors, LLC<br>trinityportfolio.com                         | 121 Countryside Court, Ste. 140<br>Southlake, TX 76092      | 03/27/2026                  | \$531 million              | 1,422          | 13                            | John Chalk Jr., Founder                                                                 |
| 23 | Dean, Jacobson Financial Services<br>deanjacobson.com                           | 3112 W. 4th St.<br>Fort Worth, TX 76107                     | 03/23/2026                  | \$519 million              | 917            | 8                             | Jeff Schmeltkopf, Tim Lowry, Jonathan Dumas, Partners                                   |
| 24 | SMH Capital Advisors LLC<br>smhca.com                                           | 4200 S. Hulen Street, Ste. 534<br>Fort Worth, TX 76109      | 03/19/2026                  | \$503 million              | 171            | 7                             | Dwayne Moyers, President                                                                |
| 25 | Basin Oil And Gas Management, LP<br>basinfunds.com                              | 1300 S. University Drive, Ste. 600<br>Fort Worth, TX 76107  | 03/31/2026                  | \$493 million              | 5              | 8                             | Stephen Howard, CEO/President                                                           |
| 26 | Ancor Capital Partners<br>ancorcapital.com                                      | 2720 E. State Hwy 114<br>Southlake, TX 76092                | 03/30/2026                  | \$458 million              | 12             | 9                             | Randy Keene, Tim McKibben, Founding Partners                                            |
| 26 | Schulz Wealth, Ltd.<br>schulzwealth.com                                         | 560 N. Walnut Creek, Ste. 120<br>Mansfield, TX 76063        | 02/25/2026                  | \$438 million              | 614            | 3                             | Robert Schulz, President                                                                |
| 28 | SWMG, LLC<br>strittmatterwealth.com                                             | 3343 Locke Avenue, Ste. 107<br>Fort Worth, TX 76107         | 03/27/2026                  | \$430 million              | 1,652          | 19                            | Josh Strittmatter, CEO/CIO                                                              |
| 29 | Point Bridge Capital, LLC<br>pointbridgecapital.com                             | 300 Throckmorton Street, Ste. 1550<br>Fort Worth, TX 76102  | 03/26/2026                  | \$420 million              | 68             | 2                             | Hal Lambert, CEO/President                                                              |
| 30 | Vortus Investment Advisors, LLC<br>vortus.com                                   | 407 Throckmorton Street, Ste. 560<br>Fort Worth, TX 76102   | 04/24/2026                  | \$412 million              | 6              | 6                             | Jeffrey Miller, Managing Partner                                                        |
| 31 | Highpeak Energy Management, LLC<br>N/A                                          | 421 W. 3rd Street, Ste. 1000<br>Fort Worth, TX 76102        | 03/23/2026                  | \$392 million              | 2              | 3                             | Michael Hollis, CEO/President                                                           |
| 32 | Rhodes Securities, Inc..<br>rhodessecurities.com                                | 306 W. 7th Street, Ste. 1000<br>Fort Worth, TX 76102        | 10/10/2025                  | \$376 million              | 815            | 9                             | Gordon Rhodes, CEO                                                                      |
| 33 | Aspenridge Wealth Advisors<br>aspenridgewealthadvisors.com                      | 9800 Hillwood Parkway, Ste. 180<br>Fort Worth, TX 76177     | 02/17/2026                  | \$375 million              | 1437           | 7                             | Nicholas Godfrey, CEO                                                                   |

# MONEY MANAGERS IN TARRANT COUNTY (34-45)

Ranked by most recent regulatory assets under management (Form ADV).

| Company Name/Website |                                                              | Address                                                      | Most Recent<br>ADV<br>Filing Date | Most Recent<br>Assets<br>Managed | Total<br>Accounts | Investment<br>Advisory<br>Employees | Top Local Executive and Title                        |
|----------------------|--------------------------------------------------------------|--------------------------------------------------------------|-----------------------------------|----------------------------------|-------------------|-------------------------------------|------------------------------------------------------|
| 34                   | Override Wealth Advisors<br>overridewealth.com               | 6300 Ridglea Place, Ste. 1020<br>Fort Worth, TX 76116        | 04/29/2026                        | \$368 million                    | 1,401             | 10                                  | Andy Heinz, CEO/President                            |
| 35                   | TI Private Wealth<br>tlprivatewealth.com                     | 165 S. Kimball Avenue, Ste. 120<br>Southlake, TX 76092       | 03/31/2026                        | \$364 million                    | 682               | 4                                   | Dustin Tondre, Brad Little, Managing Partners        |
| 35                   | Shelton Wealth Management, LLC<br>sheltonwealth.com          | 100 Throckmorton Street, Ste. 300<br>Fort Worth, TX 76102    | 06/27/2025                        | \$364 million                    | 477               | 4                                   | Keith Shelton, Co-Founder/Senior Managing Director   |
| 37                   | Heritage Retirement Advisors, LLC<br>heritage-retirement.com | 607 Cheek Sparger Road, Ste. 150<br>Colleyville, TX 76034    | 03/27/2026                        | \$351 million                    | 349               | 3                                   | Greg Hutto, Founder                                  |
| 38                   | Michels Family Financial, LLC<br>michelsfamilyfinancial.com  | 6000 Western Place, Ste. 380<br>Fort Worth, TX 76107         | 03/31/2026                        | \$348 million                    | 1,391             | 8                                   | Nick Michels, Founder                                |
| 39                   | Asset Preservation Group Inc.<br>apg-advisors.com            | 2750 William D. Tate Avenue, Ste. 100<br>Grapevine, TX 76051 | 04/30/2026                        | \$321 million                    | 1,179             | 4                                   | Michael Franklin, Russell Billingsley, Co-Presidents |
| 40                   | Openair Financial, LLC<br>openairfinancial.com               | 280 Miron Drive<br>Southlake, TX 76092                       | 03/31/2026                        | \$318 million                    | 1,212             | 7                                   | Stewart Fields, Managing Partner                     |
| 41                   | Orser Capital Management LLC<br>orsercapitalmanagement.com   | 566 N. Kimball Avenue, Ste. 100<br>Southlake, TX 76092       | 03/17/2026                        | \$290 million                    | 345               | 2                                   | William Orser, Principal                             |
| 42                   | Rivercrest Capital Management LLC<br>rivercrestcap.com       | 777 Taylor Street, Ste. 810<br>Fort Worth, TX 76102          | 03/24/2026                        | \$286 million                    | 3                 | 21                                  | Matthew Daly, Principal                              |
| 43                   | Planguide Financial<br>planguidefinancial.com                | 180 State Street, Ste. 225<br>Southlake, TX 76092            | 03/30/2026                        | \$277 million                    | 9                 | 2                                   | Sumit Guladi, President                              |
| 44                   | Berry Wealth Group<br>berrywg.com                            | 920 Whitehead Drive<br>Granbury, TX 76048                    | 03/26/2026                        | \$275 million                    | 938               | 6                                   | Michelle Berry, Owner                                |
| 45                   | Nolet Wealth Management, LLC<br>noletwealth.com              | 306 W. 7th Street, Ste. 640<br>Fort Worth, TX 76109          | 03/17/2026                        | \$273 million                    | 40                | 4                                   | David Nolet, CEO                                     |

ABOUT THE LIST: 817 Biz compiled data from forms filed with the SEC. Firms considered professional investment advisers must file Form ADV with the regulator agency. This is a broad category that anyone advising on securities, which can range from financial planners to private equity firms to energy investors. Only firms with headquarters in greater Tarrant County were included. Some data came from 817 Biz research and company websites. TPG Global Advisors is consolidated data.

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