

MONEY MANAGERS IN TARRANT COUNTY

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 tpg.com	301 Commerce Street, Ste. 3300 Fort Worth, TX 76102	04/29/2026	\$309 billion	394	1,798	Jon Winkelried, CEO/Director
2	Jasper Ridge Partners, L.P. jasperridge.com	201 Main Street, Ste. 1000 Fort Worth, TX 76102	03/31/2026	\$43.0 billion	67	145	Cori Duncan, CEO/Partner
3	Luther King Capital Management Corporation lkcm.com	301 Commerce Street, Ste. 1600 Fort Worth, TX 76102	06/27/2025	\$29.1 billion	DND	73	J. Luther King Jr., Founder/President
4	First Command Advisory Services firstcommand.com	1 Firstcomm Plaza Fort Worth, TX 76109	03/27/2026	\$24.4 billion	113,591	1,787	Mark Steffe, President and CEO
5	Crescent Real Estate LLC crescent.com	3230 Camp Bowie Blvd., Ste. 500 Fort Worth, TX 76107	03/31/2026	\$5.1 billion	43	113	Conrad Suszynski, CEO
6	Summittx Capital, L.P. summittxcapital.com	201 Main Street, Ste. 1900 Fort Worth, TX 76102	04/30/2026	\$3.4 billion	DND	80	Caroline Cooley, CEO/Co-CIO, and Neilson Arbour, Co-CIO
6	Gauge Capital gaugecapital.com	1256 Main Street, Ste. 256 Southlake, TX 76092	03/31/2026	\$3.4 billion	10	67	Tom McKelvey, Co-Founder/Managing Partner; Drew Johnson, Co-Founder/Managing Partner
8	Leo Wealth, LLC leowealth.com	860 Airport Freeway, Ste. 402 Hurst, TX 76054	03/17/2026	\$3.2 billion	5,195	43	Jessica Cutrera, Harmen Overdijk, Co-CEOs
9	Tailwind Advisors tailwindadvisors.com	1320 S. University Drive, Ste. 701 Fort Worth, TX 76107	03/24/2026	\$1.7 billion	21	12	John Batton, CIO/Principal
10	WPWealth LLP wpwealth.com	640 Taylor Street, Ste. 2200 Fort Worth, TX 76102	03/30/2026	\$1.2 billion	1,622	14	Bill Weston, Bryan McClune, Partners
11	Holt Capital Partners, L.P. holtcap.com	301 Commerce Street, Ste. 1430 Fort Worth, TX 76102	03/26/2026	\$1.1 billion	142	6	Robert M. Holt Jr., Managing Partner, Co-CEO
12	Rogers Wealth Group, Inc.. rogers401k.com	1330 Summit Avenue Fort Worth, TX 76102	03/17/2026	\$1.0 billion	876	21	Craig Rogers, CEO
13	Bentoak Capital bentoakcapital.com	201 Ft. Worth Hwy. Weatherford, TX 76086	03/31/2026	\$970 million	2,039	20	Brandon Garrett, CEO
14	Baker Financial Services bakerfinancial.net	1415 West Randol Mill Rd. Arlington, TX 76012	02/19/2026	\$909 million	1,347	7	Gerald Baker, President
15	Insight Equity Management Company LLC insightequity.com	1400 Civic Place, Ste. 250 Southlake, TX 76092	03/30/2026	\$886 million	18	21	Ted Beneski, CEO/Managing Partner
16	Alta Fox Capital Management, LLC altafoxcapital.com	640 Taylor Street, Ste. 2522 Fort Worth, TX 76102	03/31/2026	\$821 million	2	8	Connor Haley, Managing Member/Founder
17	Signal Securities, Inc.. signalsecurities.com	700 Throckmorton Fort Worth, TX 76102	03/04/2026	\$679 million	1,920	35	Chris Snow, CEO
18	St. James Investment Company, LLC stjic.com	535 S. Kimball Avenue, Ste. 140 Southlake, TX 76092	03/02/2026	\$661 million	1,049	6	Robert J. Mark, Founder
19	Aspen Wealth Management, LLC aspenwealthmgmt.com	4200 S. Hulen Street, Ste. 422 Fort Worth, TX 76109	04/13/2026	\$658 million	1,121	9	Helen Stephens, CEO/President
20	Trinity Investors Fund Advisors, LLC trinityinvestors.com	2102 E. State Hwy 114, Ste. 300 Southlake, TX 76092	04/30/2026	\$607 million	56	4	Daniel Meader, Sanjay Chandra, Managing Partners
21	Mills Wealth Advisors, LLC millswealthadvisors.com	1207 S. White Chapel Blvd., Ste. 150 Southlake, TX 76092	03/25/2026	\$549 million	1,877	8	Michael Mills, Managing Principal
22	Trinity Portfolio Advisors, LLC trinityportfolio.com	121 Countryside Court, Ste. 140 Southlake, TX 76092	03/27/2026	\$531 million	1,422	13	John Chalk Jr., Founder
23	Dean, Jacobson Financial Services deanjacobson.com	3112 W. 4th St. Fort Worth, TX 76107	03/23/2026	\$519 million	917	8	Jeff Schmeltkopf, Tim Lowry, Jonathan Dumas, Partners
24	SMH Capital Advisors LLC smhca.com	4200 S. Hulen Street, Ste. 534 Fort Worth, TX 76109	03/19/2026	\$503 million	171	7	Dwayne Moyers, President
25	Basin Oil And Gas Management, LP basinfunds.com	1300 S. University Drive, Ste. 600 Fort Worth, TX 76107	03/31/2026	\$493 million	5	8	Stephen Howard, CEO/President
26	Ancor Capital Partners ancorcapital.com	2720 E. State Hwy 114 Southlake, TX 76092	03/30/2026	\$458 million	12	9	Randy Keene, Tim McKibben, Founding Partners
27	Schulz Wealth, Ltd. schulzwealth.com	560 N. Walnut Creek, Ste. 120 Mansfield, TX 76063	02/25/2026	\$438 million	614	3	Robert Schulz, President
28	SWMG, LLC strittmatterwealth.com	3343 Locke Avenue, Ste. 107 Fort Worth, TX 76107	03/27/2026	\$430 million	1,652	19	Josh Strittmatter, CEO/CIO
29	Point Bridge Capital, LLC pointbridgecapital.com	300 Throckmorton Street, Ste. 1550 Fort Worth, TX 76102	03/26/2026	\$420 million	68	2	Hal Lambert, Founder/CEO
30	Vortus Investment Advisors, LLC vortus.com	407 Throckmorton Street, Ste. 560 Fort Worth, TX 76102	04/24/2026	\$412 million	6	6	Jeffrey Miller, Managing Partner
31	HighPeak Energy Management, LLC highpeakenergy.com	421 W. 3rd Street, Ste. 1000 Fort Worth, TX 76102	03/23/2026	\$392 million	2	3	Michael Hollis, CEO
32	Rhodes Securities, Inc.. rhodessecurities.com	306 W. 7th Street, Ste. 1000 Fort Worth, TX 76102	10/10/2025	\$376 million	815	9	Gordon Rhodes, CEO
33	Aspenridge Wealth Advisors aspenridgewealthadvisors.com	9800 Hillwood Parkway, Ste. 180 Fort Worth, TX 76177	02/17/2026	\$375 million	1437	7	Nicholas Godfrey, CEO
34	Override Wealth Advisors overridewealth.com	6300 Ridglea Place, Ste. 1020 Fort Worth, TX 76116	04/29/2026	\$368 million	1,401	10	Andy Heinz, CEO/President
35	TI Private Wealth tlprivatewealth.com	165 S. Kimball Avenue, Ste. 120 Southlake, TX 76092	03/31/2026	\$364 million	682	4	Dustin Tondre, Brad Little, Managing Partners
35	Shelton Wealth Management, LLC sheltonwealth.com	100Throckmorton Street, Ste. 300 Fort Worth, TX 76102	06/27/2025	\$364 million	477	4	Keith Shelton, Co-Founder/Senior Managing Director
37	Heritage Retirement Advisors, LLC heritage-retirement.com	607 Cheek Sparger Road, Ste. 150 Colleyville, TX 76034	03/27/2026	\$351 million	349	3	Greg Hutto, Founder
38	Michels Family Financial, LLC michelsfamilyfinancial.com	6000 Western Place, Ste. 380 Fort Worth, TX 76107	03/31/2026	\$348 million	1,391	8	Nick Michels, Founder
39	Asset Preservation Group Inc. apg-advisors.com	2750 William D.Tate Avenue, Ste. 100 Grapevine, TX 76051	04/30/2026	\$321 million	1,179	4	Michael Franklin, Russell Billingsley, Co-Presidents
40	Openair Financial, LLC openairfinancial.com	280 Miron Drive Southlake, TX 76092	03/31/2026	\$318 million	1,212	7	Stewart Fields, Managing Partner
41	Orser Capital Management LLC orsercapitalmanagement.com	566 N. Kimball Avenue, Ste. 100 Southlake, TX 76092	03/17/2026	\$290 million	345	2	William Orser, Principal
42	Rivercrest Capital Management LLC rivercrestcap.com	777 Taylor Street, Ste. 810 Fort Worth, TX 76102	03/24/2026	\$286 million	3	21	Matthew Daly, Principal
43	Planguide Financial planguidefinancial.com	180 State Street, Ste. 225 Southlake, TX 76092	03/30/2026	\$277 million	9	2	Sumit Guladi, President
44	Berry Wealth Services berrywg.com	920 Whitehead Drive Granbury, TX 76048	03/26/2026	\$275 million	938	6	Michelle Berry, Owner
45	Nolet Wealth Management, LLC noletwealth.com	306 W. 7th Street, Ste. 640 Fort Worth, TX 76102	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.