

# THE LIST

## LARGEST BAY AREA WEALTH MANAGEMENT FIRMS

RANKED BY BAY AREA ASSETS UNDER MANAGEMENT FOR INDIVIDUAL CLIENTS

Rank	Business Name/Prior Rank	Bay Area Assets Under Management For Individual Clients <sup>1</sup>	Total Bay Area Assets Under Management	Minimum Investment <sup>2</sup>	Bay Area Portfolio Managers	Bay Area Research Analysts	Top Local Executive(s)
20	<b>Litman Gregory Asset Management</b> 100 Larkspur Landing Cir. #204 Larkspur, CA 94939 415-461-8999 <a href="http://lgam.com">lgam.com</a>	\$1.42 billion	\$1.75 billion	NA	7	5	Jennifer Ceccarelli, Principal/COO/CCC Steve Savage, Principal/CEO Alice Lowenstein, Principal/Managing Director
21	<b>Evercore Wealth Management</b> 425 California St. #1500 San Francisco, CA 94104 415-288-3000 <a href="http://evercorewealthmanagement.com">evercorewealthmanagement.com</a>	\$1.26 billion	\$1.46 billion	\$5 million	6	1	Keith McWilliams, Partner/Head of San Francisco Office
22	<b>Osborne Partners Capital Management LLC</b> 580 California St. #1900 San Francisco, CA 94104 415-362-5637 <a href="http://osbornepartner.com">osbornepartner.com</a>	\$1.24 billion	\$1.24 billion	\$500,000	4	3	Chuck Else, Principal Charles Osborne, Chairman/ Principal Justin McNichols, CIO/Principal
23	<b>Ashfield Capital Partners</b> 801 Montgomery St. #200 San Francisco, CA 94133 415-391-4747 <a href="http://ashfield.com">ashfield.com</a>	\$982.52 million	\$1.21 billion	\$5 million	5	1	J. Stephen Lauck, Chairman/Portfolio Manager Peter Johnson, CEO/ Portfolio Manager
24	<b>Osterweis Capital Management</b> 1 Maritime Plz. #1800 San Francisco, CA 94111 415-434-4441 <a href="http://osterweis.com">osterweis.com</a>	\$890.44 million	\$5.30 billion	\$5 million	11	4	John Osterweis, Chairman/CIO
25	<b>Rebalance</b> 530 Lytton Ave. #200 Palo Alto, CA 94301 650-396-3900 <a href="http://rebalance360.com">rebalance360.com</a>	\$795.55 million	\$795.55 million	\$100,000	3	1	Mitch Tuchman, Managing Director
26	<b>Burton Enright Welch</b> 1850 Mt. Diablo Blvd. #335 Walnut Creek, CA 94596 925-932-8010 <a href="http://bewinvest.com">bewinvest.com</a>	\$751.39 million	\$751.39 million	\$1 million	7	7	Jeremy Welch, Managing Principal
27	<b>Rudney Associates</b> 1499 Danville Blvd. #250 Alamo, CA 94507 925-838-0696 <a href="http://rudneyassociates.com">rudneyassociates.com</a>	\$535.00 million	\$535.00 million	NA	1	1	Eric Rudney, President
28	<b>Violich Capital Management</b> 201 California St. #650 San Francisco, CA 94111 415-217-4444 <a href="http://violichcapital.com">violichcapital.com</a>	\$507.66 million	\$550.43 million	\$1 million	2	2	Adam Violich, President Matthew Schmidt, Portfolio Manager and Research Analyst
29	<b>Brio Financial Group</b> 19 Sutter St. San Francisco, CA 94117 415-623-2450 <a href="http://briofg.com">briofg.com</a>	\$447.60 million	\$447.60 million	\$0	5	2	JakeZalewski, CEO
30	<b>The Advisory Group of San Francisco LLC</b> 44 Montgomery St. #2410 San Francisco, CA 94104 415-977-1200 <a href="http://advisorygroupsf.com">advisorygroupsf.com</a>	\$331.97 million	\$945.98 million	\$2 million	5	5	Greg Patterson, CEO
31	<b>Financial Connections Group Inc.</b> 21 Tama1 Vista Blvd. #105 Corte Madera, CA 94925 415-924-1091 <a href="http://financialconnections.com">financialconnections.com</a>	\$286.84 million	\$286.84 million	\$500,000	3	3	Jill Hollander, President
32	<b>Ginsburg Financial Advisors Inc.</b> 6201 Medau Pl. #101 Oakland, CA 94611 510-339-3933 <a href="http://ginsburgadvisors.com">ginsburgadvisors.com</a>	\$189.00 million	\$189.00 million	\$1 million	2	1	LarryGinsburg, President
33	<b>SD Mayer &amp; Associates LLP</b> 235 Montgomery St. 30th Fl. San Francisco, CA 94104 415-691-4040 <a href="http://sdmayer.com">sdmayer.com</a>	\$35.00 million	\$42.90 million	NA	2	1	Stephen Mayer, Managing Partner
34	<b>Merrill Lynch Wealth Management</b> 555 California St. 9th Fl. San Francisco, CA 94104 415-676-2678 <a href="http://ml.com">ml.com</a>	\$0	\$84.10 billion	NA	404	0	Tracy Murphy, PWM San Francisco Market Executive Marcel TenBerge, MLWM San Francisco Market Executive

<sup>1</sup>Assets under management for individual clients with separate or individually managed accounts (individual clients only, not institutional) as of April 1, 2020, unless otherwise noted.

<sup>2</sup>Pertains to individual clients with separate or individually managed accounts.

<sup>3</sup>As of May 31, 2020.