

The Top 50 Institutional Consultants

Many of the nation's top wealth management teams specialize in investing for large organizations—pension plans, university endowments, charitable foundations and the like. These teams also serve individual investors, many of whom want institutional-style oversight of their investments. This is our fourth annual institutional consultant ranking.

Rank '18 '17	Team	Location	Parent Company	Key Advisors	Team IC Assets (bil)
1. 2.	UBS Institutional Consulting, Atlanta	Atlanta	UBS Financial	Earle Dodd, Scott Olsen, Allen Wright	\$15.2
2. 4.	Retirement Benefits Group	San Diego	LPL Financial	Larry Deatherage, Anthony Franchimone, Sean Ciemiewicz	14.3
3. 1.	Graystone Consulting, Dobbs Group	Indianapolis	Morgan Stanley	William Craig Dobbs	26.3
4. 3.	Sheridan Road Financial	Northbrook, Ill.	Independent	Jim O'Shaughnessy, Daniel Bryant	12.7
5. N	Team Schott	Hollywood, Fla.	Captrust	Stephen Schott	11.8
6. N	Team Esch	Minneapolis	Captrust	Dan Esch	18.9
7. 15.	Graystone Consulting, Stephans, Van Liew & Oiler Group	Chicago	Morgan Stanley	Linda Stephans, Kristina Van Liew, Erik Oiler	5.3
8. N	Graystone Consulting, Messner Group	Birmingham, Mich.	Morgan Stanley	William Messner, John Krakowiak, Jason May	7.5
9. 13.	Graystone Consulting, Columbus, Ohio	Columbus	Morgan Stanley	Michael Rosloniec, Jennifer Hamant, Cheryl Carpenter	5.4
10. 22.	Graystone Consulting, Chicago NW	Barrington, Ill.	Morgan Stanley	George T. Cook, Carl H. Viard, Mary L. Tomanek	6.9
11. 8.	Graystone, Metropolitan, D.C.	Potomac, Md.	Morgan Stanley	Robert S. Scherer, Dean J Eisen, Ross Charkatz	5.5
12. N	Team Strickland	Raleigh, N.C.	Captrust	Jon Strickland	15.8
13. N	Team Stanicek	Raleigh, N.C.	Captrust	Jason Stanicek	17.3
14. 7.	UBS Institutional Consulting, NW	Seattle	UBS Financial	Trent Sanden, Shawn Hintz, Frank Gallo	22.0
15. 6.	Graystone Consulting, Longo Group	New York	Morgan Stanley	John Longo	15.1
16. 21.	Graystone Consulting, Parks Group	Milwaukee	Morgan Stanley	Thomas Parks, Robert Parks, Tina Wisialowski	9.2
17. 23.	Graystone Consulting, Wyomissing	Wyomissing, Pa.	Morgan Stanley	Harry J. Herb, Thomas Schatzman	13.3
18. 10.	Graystone Consulting, Tampa	Tampa	Morgan Stanley	Charles H. Mulfinger II, David A. Wheeler, Adam H. Palmer	6.6
19. 9.	Mason Investment Advisory	Reston, Va.	Mason Cos.	Scott S. George	3.4
20. 19.	Graystone, Houston	Houston	Morgan Stanley	John Granger II	13.9
21. N	Francis Investment Counsel	Brookfield, Wisc.	Independent	Michael Francis, Kelli Send, Clifford Dunteman	7.8
22. 5.	Global Institutional Consulting, Gsell Group	Iselin, N.J.	Bank of America / Merrill Lynch	Goran Bojovski	12.0
23. 16.	Global Institutional Consulting, Starratt Group	Los Angeles	Bank of America / Merrill Lynch	Michael Starratt, John Carlson, Mark Jacoby	11.3
24. 12.	Global Institutional Consulting, Dunn, Dunne Group	Bethesda, Md.	Bank of America / Merrill Lynch	George Dunn, Peter Dunne, Bruce Wall	3.2
25. 24.	Legacy Strategic Asset Mgmt.	Hudson, Ohio	Wells Fargo Advisors	James Barsella, Douglas Krapf, Matthew Shannon	5.8

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26. 18.	Cornerstone Advisors Asset Mgmt.	Bethlehem, Pa.	Independent	Malcolm Cowen II, Thomas Scalici, Christopher McKinley	\$4.9
27. N	Compass Financial Partners	Greensboro, N.C.	LPL Financial	Kathleen Kelly, George Hoyle	8.9
28. N	Team Wilt	Akron, Ohio	Captrust	Steve Wilt	8.1
29. 17.	Eisen-Sessa Group	Philadelphia	UBS Financial	David Eisen, Charles Sessa	10.4
30. N	Strategic Retirement Group	White Plains, New York	Independent	David Hinderstein	9.0
31. 25.	Graystone Consulting, Quantitative Group	San Antonio, Texas	Morgan Stanley	Ron Kern, Joe Sammons, Myrteel Ward	3.3
32. N	Graystone Consulting, Brice Group	Birmingham, Mich.	Morgan Stanley	Brian Brice, Timothy Brice	5.5
33. 26.	Optimal Service Group	Williamsburg, Virginia	Wells Fargo Advisors	Joseph M. Montgomery	11.5
34. N	Team Edwards / Schantz	Bethlehem, Pa.	Captrust	Jim Edwards, Wes Schantz	5.6
35. N	Team Davis	Westlake Village, Calif.	Captrust	Mark A. Davis	6.4
36. N	Graystone Consulting, Charleston, W.Va.	Charleston, W. Va.	Morgan Stanley	John E. Dawson, II, Donald C. Lucci, Michael D. Hill	3.5
37. 20.	GIC, Veldheer, Long, Mackay & Bernecker Group	Grand Rapids, Mich.	Bank of America / Merrill Lynch	William Mackay, James Veldheer, Timothy Long	3.9
38. N	MRP	Denver, Colo.	LPL Financial	Chad J. Larsen, M. Corey Whitehead, Kirk Welch	4.7
39. N	Private Asset Management	Milwaukee	Robert W. Baird	Michael G. Klein, Philip C. Dallman	7.4
40. N	Graystone Consulting, Pittsburgh, PA / Cleveland, OH	Pittsburgh	Morgan Stanley	Greg Simakas, Charles Snyder, Josh Dautovic	3.4
41. N	Advanced Research Investment Solutions	Beverly Hills, Calif.	Independent	Alex Shahidi, Damien Bisserier	10.5
42. N	Graystone, Consulting, Los Angeles	Westlake Village, Calif.	Morgan Stanley	Larry Mills, Christopher Venuti, Marc Roggenkamp	5.7
43. N	Global Institutional Consulting, Ryan Group	New York	Bank of America / Merrill Lynch	Courtney Moore	2.2
44. N	Princeton Investment Consulting	Princeton, N.J.	UBS Financial	L. Marc Shegoski, David Sears	3.1
45. N	Bickham-Tabb Group	New Orleans	UBS Financial	Robert Bickham, Hal Tabb	4.3
46. N	Willhite Institutional Consulting Group	The Woodlands, Texas	UBS Financial	Jon Willhite, Robert Vaughan	4.2
47. 11.	Global Institutional Consulting, Cate Brunton Luc Group	Indianapolis	Bank of America / Merrill Lynch	John Cate	10.1
48. N	Enterprise Retirement Solutions	Houston	LPL/ Amegy Bank	Deborah Lundin	3.5
49. N	Graystone Consulting, Detterick Group	New York	Morgan Stanley	Jim Detterick	4.1
50. N	Catanela Institutional Consulting Group	Philadelphia	UBS Financial	Ken Catanela, Brian Catanela	3.7

N=Not ranked