

From the Nashville Business Journal:

<https://www.bizjournals.com/nashville/subscriber-only/2023/09/15/largest-financial-planners-in-nashville.html>

**T H E L I S T**

## Largest Financial Planners in Nashville

Ranked by Total local investment assets

Locally Researched by: Carol Smith, Nashville Business Journal

This List ranks Nashville-area financial planning firms by total local investment assets.

Information was obtained from firm representatives. Information on The List was supplied by individual companies through questionnaires and could not be independently verified by the Nashville Business Journal. Only those that responded to our inquiries were listed. In case of ties, companies are listed alphabetically. The Nashville area is defined as: Cheatham, Davidson, Dickson, Montgomery, Robertson, Rutherford, Sumner, Williamson and Wilson counties.

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	<b>NAME/PRIOR RANK (*NOT RANKED)/URL</b>		<b>ADDRESS/PHONE</b>	<b>TOTAL LOCAL INVESTMENT ASSETS</b> ↓ <sup>1</sup>	<b>BL %: FE BA</b>
<b>1</b>	RAYMOND JAMES FINANCIAL raymondjames.com	1	1033 Demonbreun St., #500 Nashville, TN 37203 615-645-6700	\$29.47 billion <sup>2</sup>	NA
<b>2</b>	MERRILL LYNCH WEALTH MANAGEMENT ml.com	2	222 2nd Ave. S, #2500 Nashville, TN 37201 615-747-5600	\$15.5 billion	70'
<b>3</b>	MORGAN STANLEY WEALTH MANAGEMENT advisor.morganstanley.com/west-end-nashville-branch	3	3102 West End Ave., #200 Nashville, TN 37203 615-292-0303	\$13.5 billion	75'
<b>4</b>	BAIRD nashville.bairdwealth.com	4	1600 West End Ave., #1100 Nashville, TN 37203 615-341-7000	\$10.5 billion	NA
<b>5</b>	UBS FINANCIAL SERVICES INC. ubs.com	5	315 Deaderick St. Nashville, TN 37238 615-750-8000	\$10 billion	NA
<b>6</b>	PINNACLE FINANCIAL PARTNERS pnfp.com	8	150 3rd Ave. S Nashville, TN 37201 615-744-3705	\$6.66 billion	NA
<b>7</b>	SAGESPRING WEALTH PARTNERS   RAYMOND		801 Crescent Centre Dr., #600	\$5.8 billion	NA

<sup>1</sup> As of June 30, 2023. Should only include investment assets managed by local firms. Should include assets for which the firm is collecting advisory fees and/or commissions.

<sup>2</sup> Assets exclude the following affiliates: SageSpring Wealth Partners (formerly Management); Cypress Capital; TBH Global and TBH Advisors; Davis Davis and Associates.

<sup>3</sup> Formerly Southwestern Investment Group | Raymond James.

<sup>4</sup> Operates as a sole proprietorship and is not in legal partnership with Northwell.

	<b>NAME/PRIOR RANK (*NOT RANKED)/URL</b>		<b>ADDRESS/PHONE</b>	<b>TOTAL LOCAL INVESTMENT ASSETS</b> <sup>1</sup> ↓	<b>BL %: FE BA</b>
	JAMES <sup>3</sup> sagespring.com	9	Franklin, TN 37067 615-861-6100		
8	CAPTRUST captrust.com	14	5314 Maryland Way, #300 Brentwood, TN 37027 615-377-1177	\$5.3 billion	100
9	NORTHWESTERN MUTUAL IN NASHVILLE <sup>4</sup> nashville.nm.com	7	1600 Division St., #400 Nashville, TN 37203 615-742-8700	\$5.11 billion	90
10	JANNEY MONTGOMERY SCOTT janney.com	6	6700 Tower Cir., #200 Franklin, TN 37067 615-538-9925	\$4.5 billion	90
11	THOROUGHbred FINANCIAL SERVICES thoroughbredfinancial.com	10	5110 Maryland Way, #300 Brentwood, TN 37027 615-371-0001	\$3.63 billion	90
12	PEACHTREE PLANNING peachtreepanning.com	11	9019 Overlook Blvd., #D-1 Brentwood, TN 37027 615-376-8300	\$3.24 billion	30
13	STRATEGIC FINANCIAL PARTNERS strategicfinancialpartners.com	13	3401 Mallory Ln., #220 Franklin, TN 37067 615-435-4130	\$2.49 billion	80

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<b>14</b>	ARGENT TRUST argentfinancial.com	15	3102 West End Ave., #775 Nashville, TN 37203 615-385-2345	\$2.48 billion	0%
<b>15</b>	DIVERSIFIED TRUST diversifiedtrust.com	17	3102 West End Ave., #600 Nashville, TN 37203 615-386-7302	\$2.23 billion	0%
<b>16</b>	LBMC INVESTMENT ADVISORS lbmc.com	17	201 Franklin Rd., #400 Brentwood, TN 37027 615-377-4600	\$1.8 billion	0%
<b>17</b>	LEE DANNER & BASS INC. – INVESTMENT COUNSEL leedannerbass.com	20	3100 West End Ave., #1250 Nashville, TN 37203 615-244-7775	\$1.48 billion	10%
<b>18</b>	WOODMONT INVESTMENT COUNSEL woodmontcounsel.com	21	401 Commerce St., #5400 Nashville, TN 37219 615-297-6144	\$1.38 billion	0%
<b>19</b>	CAPWEALTH capwealthgroup.com	19	4031 Aspen Grove Dr., #600 Franklin, TN 37067 615-778-0740	\$1.3 billion	10%
<b>20</b>	FIFTH THIRD BANK 53.com		424 Church St., #700	\$1.04 billion	77%

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	NAME/PRIOR RANK (*NOT RANKED)/URL	ADDRESS/PHONE	TOTAL	BL
			LOCAL INVESTMENT ASSETS <sup>1</sup>	
			↓	
		Nashville, TN 37219 615-687-3110		
<b>21</b>	VIRTUE CAPITAL MANAGEMENT virtuecapitalmanagement.com	<sup>23</sup> 6 Cadillac Drive, #310 Brentwood, TN 37027 615-340-0801	\$942.59 million	10%
<b>22</b>	THE R.O.W. GROUP therowgroup.com	<sup>22</sup> 2020 21st Ave. S, #200 Nashville, TN 37212 615-250-7600	\$940.88 million	15%
<b>23</b>	RONALD BLUE TRUST ronblue.com	<sup>25</sup> 1000 Health Park Dr., #180 Brentwood, TN 37027 615-373-2800	\$867.69 million	0%
<b>24</b>	SEVEN SPRINGS WEALTH GROUP sevenspringswealth.com	340 Seven Springs Way, #710 Brentwood, TN 37027 615-370-1253	\$764 million	10%
<b>25</b>	ADAMS WEALTH PARTNERS   RAYMOND JAMES adamswealthpartners.com	2905 12th Ave. S, #108 Nashville, TN 37204 615-435-3644	\$700 million	95%

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