

From the Nashville Business Journal:  
<https://www.bizjournals.com/nashville/subscriber-only/2024/09/13/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. Not all firms surveyed responded to requests for information, and some declined to provide information. 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.

	<b>NAME/PRIOR RANK (*NOT RANKED)/URL</b>	<b>ADDRESS/PHONE</b>	<b>TOTAL LOCAL INVESTMENT ASSETS</b> ↓ <sup>1</sup>	<b>BUSINESS %: FEE-BASE</b>
<b>1</b>	RAYMOND JAMES FINANCIAL raymondjames.com	<sup>1</sup> 1033 Demonbreun St., #500 Nashville, TN	\$36.6 billion	37%
<b>1</b>	As of June 30, 2024. Should only include investment assets managed by local firms. Do not include assets for which the firm is collecting advisory fees and/or commissions.			
<b>2</b>	Operates as a sole proprietorship and is not in legal partnership with Northwell.			

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			37203 615-645-6700		
<b>2</b>	MERRILL LYNCH WEALTH MANAGEMENT ml.com	2	222 2nd Ave. S, #2500 Nashville, TN 37201 615-747-5600	\$18 billion	70%
<b>3</b>	MORGAN STANLEY WEALTH MANAGEMENT advisor.morganstanley.com/ nashville-branch	3	3102 West End Ave., #200 Nashville, TN 37203 615-292-0303	\$13.38 billion	80%
<b>4</b>	BAIRD nashville.bairdwealth.com	4	1600 West End Ave., #1100 Nashville, TN 37203 615-341-7000	\$11 billion	NA
<b>5</b>	UBS FINANCIAL SERVICES INC. ubs.com	5	315 Deaderick St. Nashville, TN 37238 615-750-8000	\$10.54 billion	NA
<b>6</b>	CAPTRUST captrust.com	8	5314 Maryland Way, #300 Brentwood, TN 37207 615-377-1177	\$7.74 billion	100%
<b>7</b>	PINNACLE FINANCIAL PARTNERS pnfp.com	6	150 3rd Ave. S Nashville, TN 37201 615-744-3705	\$6.15 billion	75%
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<b>8</b>	NORTHWESTERN MUTUAL IN NASHVILLE <sup>2</sup> nashville.nm.com	<sup>9</sup> 1600 Division St., #400 Nashville, TN 37203 615-742-8700	\$5.29 billion	96%
<b>9</b>	THOROUGHbred FINANCIAL SERVICES thoroughbredfinancial.com	<sup>11</sup> 5110 Maryland Way, #300 Brentwood, TN 37027 615-371-0001	\$4.34 billion	90%
<b>10</b>	SAGESPRING WEALTH PARTNERS   RAYMOND JAMES sagespring.com	<sup>7</sup> 801 Crescent Centre Dr., #600 Franklin, TN 37067 615-861-6100	\$4.34 billion	NA
<b>11</b>	STRATEGIC FINANCIAL PARTNERS strategicfinancialpartners.com	<sup>13</sup> 3401 Mallory Ln., #220 Franklin, TN 37067 615-435-4130	\$4.22 billion	40%
<b>12</b>	PEACHTREE PLANNING peachtreeplanning.com	<sup>12</sup> 9019 Overlook Blvd., #D-1 Brentwood, TN 37027 615-376-8300	\$3.53 billion	30%
<b>13</b>	ARGENT TRUST argentfinancial.com	<sup>14</sup> 3102 West End Ave., #775 Nashville, TN 37203 615-385-2345	\$3.05 billion	0%
<b>14</b>	DIVERSIFIED TRUST diversifiedtrust.com	<sup>15</sup> 3102 West End Ave., #600 Nashville, TN 37203 615-386-7302	\$2.3 billion	0%

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15	LBMC INVESTMENT ADVISORS lbmc.com	<sup>16</sup> 201 Franklin Rd., #400 Brentwood, TN 37027 615-377-4600	\$1.9 billion	0%
16	LEE DANNER & BASS INC. – INVESTMENT COUNSEL leedannerbass.com	<sup>17</sup> 3100 West End Ave., #1250 Nashville, TN 37203 615-244-7775	\$1.67 billion	100%
17	WOODMONT INVESTMENT COUNSEL woodmontcounsel.com	<sup>18</sup> 3825 Bedford Ave., #202 Nashville, TN 37215 615-297-6144	\$1.6 billion	0%
18	CAPITAL STEWARDSHIP PARTNERS capstewardship.com	1600 Division St., #400 Nashville, TN 37203 615-742-8700	\$1.6 billion	95%
19	CAHABA WEALTH MANAGEMENT cahabawealth.com	1222 Demonbreun St., #1225 Nashville, TN 37203 615-457-8342	\$1.5 billion	0%
20	CAPWEALTH capwealthgroup.com	<sup>19</sup> 4031 Aspen Grove Dr., #600 Franklin, TN 37067 615-778-0740	\$1.46 billion	100%
21	FIFTH THIRD 53.com	<sup>20</sup> 424 Church St., #700 Nashville, TN	\$1.12 billion	NA

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			37219 615-687-3110		
<b>22</b>	THE R.O.W. GROUP therowgroup.com	22	2020 21st Ave. S, #200 Nashville, TN 37212 615-250-7600	\$1.03 billion	15%
<b>23</b>	VIRTUE CAPITAL MANAGEMENT virtuecapitalmanagement.com	21	6 Cadillac Dr., #310 Brentwood, TN 37027 615-340-0801	\$926.75 million	100%
<b>24</b>	ADAMS WEALTH PARTNERS   RAYMOND JAMES adamswealthpartners.com	25	2905 12th Ave. S, #108 Nashville, TN 37204 615-435-3644	\$800 million	99%
<b>24</b>	WEALTH ENHANCEMENT GROUP wealthenhancement.com		112 Westwood Pl., #210 Brentwood, TN 37027 615-620-3900	\$800 million	100%
<b>26</b>	SEVEN SPRINGS WEALTH GROUP sevenspringswealth.com	24	340 Seven Springs Way, #710 Brentwood, TN 37027 615-370-1253	\$780 million	100%
<b>27</b>	BLUE TRUST bluetrust.com	23	1000 Health Park Dr., #400 Brentwood, TN 37027 615-373-2800	\$755.72 million	0%
<b>28</b>	SAGEGUARD FINANCIAL GROUP sageguardfinancial.com		3066 Business Park Cir. Goodlettsville, TN	\$535 million	100%

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		↓	
	37072 615-859-4567		
<b>29</b> KRAFT ASSET MANAGEMENT kraftasset.com	555 Great Circle Rd. Nashville, TN 37228 615-782-4286	\$530.67 million	0%
<b>30</b> DECKER WEALTH MANAGEMENT deckerwealth.com	4535 Harding Pike, #201 Nashville, TN 37205 615-212-2958	\$420 million	0%
<b>31</b> THE WEALTH MANAGEMENT GROUP the-wmg.com	751 Cool Springs Blvd., #100 Franklin, TN 37067 615-778-1790	\$375 million	73%
<b>32</b> CONTINUUM PLANNING PARTNERS cppadvisors.com	10 Cadillac Dr., #390 Brentwood, TN 37027 615-309-6300	\$316 million	95%
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