

BALTIMORE BUSINESS JOURNAL

FINANCIAL PLANNING COMPANIES

RANKED BY BALTIMORE-AREA PROFESSIONALS

Name/URL	Address/Phone	Baltimore-area professionals	Total number of local offices	Specialty areas	Top local executive(s)
1 Alex. Brown, a division of Raymond James ^⑤ alex-brown.com	100 International Drive 22nd Floor Baltimore, MD 21202 410-525-6200	138	1	traditional and alternative investments across all major asset classes; tailored wealth management solutions	Haig Ariyan, President
2 Janney Montgomery Scott LLC ^④ janney.com	2800 Quarry Lake Drive #160 Baltimore, MD 21209 410-580-5022	71	6	comprehensive financial planning advice; diversified portfolios and asset allocation; asset management	Todd Mitchell, SVP/Branch office manager, Baltimore office; Jay Atkinson, VP/Branch office manager, Towson office; Tom Simcik, SVP/Mid-Atlantic regional manager
3 Northwestern Mutual ^⑥ northwesternmutual.com	111 S. Calvert St. #2500 Baltimore, MD 21202 410-539-0084	68	4	retirement planning; estate planning; risk management	Scott Iodice, Managing partner
4 RBC Wealth Management ^① rbcmw-usa.com	2800 Quarry Lake Drive #260 Baltimore, MD 21209 410-318-5074	51	6	investment management and advice; wealth management planning; asset management	Patrick Vaughan, Divisional director, East region
5 Glass Jacobson Financial Group ^⑳ glassjacobson.com	10711 Red Run Blvd. #101 Owings Mills, MD 21117 410-356-1000	41	1	investment management; retirement plan services; financial planning	Ed Jacobson, President/CEO
6 Founders Financial Inc. ^⑨ foundersfinancial.com	1020 Cromwell Bridge Road Towson, MD 21286 410-308-9988	34	23	asset management; brokerage services; wealth planning	Bradley Shepherd, President
7 Heritage Financial Consultants LLC ^⑫ heritageconsultants.com	307 International Circle #390 Hunt Valley, MD 21030 410-785-0033	30	1	wealth management; financial planning; retirement planning	Brian Gracie; John McCarthy, Partners
7 Planning Solutions Group ^⑪ psgplanning.com	8161 Maple Lawn Blvd. #400 Fulton, MD 20759 301-543-6000	30	1	family wealth management; retirement planning; business succession planning	Robert Carson, Managing partner
9 Pinnacle Advisory Group ^⑩ pinnacleadvisory.com	6345 Woodside Court #100 Columbia, MD 21046 410-995-6630	25	1	retirement planning; investment management; financial planning	John Hill, Partner/CEO
10 WMS Partners LLC ^⑮ wms-partners.com	1 Olympic Place 8th Floor Towson, MD 21204 410-337-7575	20	1	wealth management; multifamily office; alternative investments	Martin Eby, Chief advisory officer; Timothy Chase, CEO
11 Scarborough Capital Management ^㉑ scmadvice.com	441-E Defense Highway Annapolis, MD 21401 410-573-5700	19	1	retirement planning; 401(k) management; pension analysis	Ian Arrowsmith, Managing partner
12 SC&H Financial Advisors Inc. ^㉓ scandh.com	910 Ridgebrook Road Sparks, MD 21152 410-403-1500	18	2	financial planning; wealth and investment management; tax preparation and advice	Gregory Horning, President
13 Synergy Financial Group ^⑲ sfjmd.com	401 Washington Ave. 7th Floor Towson, MD 21204 410-825-3200	15	2	family wealth management; employer sponsored retirement plans; personal estate planning	Lawrence Leitch; Stephen Spurrier, Partners
14 Greenspring Wealth Management Inc. ^⑱ greenspringwealth.com	501 Fairmount Ave. #102 Towson, MD 21286 443-564-4600	14	1	financial planning; investment management; retirement plan consulting	Joshua Itzoe; Patrick Collins, Partners/managing directors
15 Berman McAleer LLC ^㉒ bmcplanning.com	9690 Deereco Road #800 Timonium, MD 21093 410-560-9960	12	1	wealth management; retirement; estate planning	David Berman, Co-Founder/CEO
15 FAI Wealth Management [⊕] investfai.com	10211 Wincopin Circle #220 Columbia, MD 21044 410-715-9200	12	1	wealth management; investment management; financial planning services	Lyn Dippel, President and CEO
17 Maller Wealth Advisors [⊕] mallerwealthadvisors.com	307 International Circle #530 Hunt Valley, MD 21030 410-771-5660	10	1	comprehensive financial planning; investment management; employer-sponsored retirement plans	Peter Maller, Founder/President
18 StratWealth ^⑰ strat-wealth.com	7300 Grace Drive Columbia, MD 21044 410-988-9494	9	1	financial planning; investment management; 401(k) fiduciary	James Eichelberger, CEO
19 Asset Strategy Consultants LLC ^⑬ assetstrategyconsultants.com	6 N. Park Drive #208 Baltimore, MD 21030-1820 410-528-8282	8	1	investment management for endowments/foundations portfolios; retirement plans; defined benefit and contribution plans; insurance companies	Ted Herget; Alfred Morrison, Co-founders/principals/senior consultants
20 Tufton Capital Management LLC [⊕] tuftoncapital.com	303 International Circle #430 Hunt Valley, MD 21030 4104008500	7	1	NA	Chad Meyer, Managing partner
21 Benjamin F. Edwards [⊕] benjaminfedwards.com	111 S. Calvert St. #1720 Baltimore, MD 21202 410-347-5559	6	1	wealth management; asset management; financial planning	Rick Faby, SVP, Branch Manager
21 Brotman Financial Group Inc. ^㉔ brotmanfinancial.com	16 Greenmeadow Drive #201 Timonium, MD 21093 410-252-4555	6	1	comprehensive financial planning; multigenerational wealth management; estate planning	Eric Brotman, Managing Principal / President; Michelle Roberts, COO; Kathleen Benjamin, Principal
21 F.N.B. Wealth Management [⊕] fnb-online.com/invest	300 E. Lombard St. Baltimore, MD 21202 888-824-5833	6	31	investment management; financial planning; trust services	Vincent Delie Jr., President/CEO; Kim Craig
21 Williams Asset Management [⊕] williamsassetmanagement.com	8850 Columbia 100 Parkway #204 Columbia, MD 21045 410-740-0220	6	1	comprehensive wealth management; investment management; retirement planning	Gary Williams, President and CEO
25 Atlantic Trust [⊕] atlantictrust.com	100 International Drive 23rd Fl. Baltimore, MD 21202 410-539-4660	4	NA	holistic wealth management; diversified investment management including alternatives; trust services	Dee Ann Schedler; Steven Smith, Managing director

¹ Formerly Deutsche Bank Wealth Management

NOTES: NA - not applicable, not available or not approved; * - not ranked on last year's List; Information for this List was obtained via surveys; Professionals are defined as those who have obtained a series 7 license, a CPA or CFP license, and are qualified to provide comprehensive financial planning services.

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