

2026

# TOP WEALTH ADVISORS

**BEST-IN-STATE**

[View the National List >](#)

APRIL 07, 2026, 10:00 AM



Presented By



**F**or wealth advisors, 2026 has already proven to be another test of discipline. Markets have been whipsawed by tariff disputes, Middle East tensions, volatile oil prices and shifting expectations for interest rates. After a strong run in recent years, investors are once again confronting uncertainty, with sudden swings that can challenge even seasoned market participants. These are the moments when financial advisors prove their worth. Beyond managing portfolios, they help clients navigate volatility, stick to long-term plans and avoid costly emotional decisions. The advisors featured in the eighth annual Forbes | SHOOK Best-In-State Wealth Advisors ranking have done just that, guiding clients through an increasingly complex investment landscape. Collectively, this year's Best-In-State advisors oversee \$20.6 trillion in assets. Forbes' ranking, compiled by SHOOK Research, is based on both quantitative and qualitative factors, including interviews, and evaluates advisors nominated by their firms.

**[CLICK HERE FOR THE FULL METHODOLOGY.](#)**



## David Karp

**FIRM:** CRESSET  
**LOCATION:** RESTON, VIRGINIA  
**TEAM CUSTODIED ASSETS:** \$6.6 BILLION

“In building a portfolio, there are only three things we have control over: fees, risk and taxes. I can’t control markets.”

[VIEW PROFILE](#) >



## Holly Kroft

**FIRM:** NEUBERGER BERMAN  
**LOCATION:** NEW YORK, NY  
**TEAM CUSTODIED ASSETS:** \$4.4 BILLION

“A wealthy life—and a successful wealthy life—encompasses far more than just your investments.”

[VIEW PROFILE](#) >

**Forbes | SHOOK**

Data provided by SHOOK® Research, LLC — Data as of 6/30/25. The Forbes | SHOOK® America’s Top Wealth Advisors and Best-in-State Wealth Advisors rankings were developed by SHOOK Research, LLC. Data as of June 30, 2025. Published by Forbes (April 2026). The rankings are based on SHOOK Research’s independent methodology and ranking algorithm, which includes in-person, virtual and telephone due diligence meetings to qualitatively evaluate each advisor across criteria such as client impact, industry experience, client retention, review of best practices, credentials, compliance records and firm nominations, as well as quantitative factors including assets under management and revenue generated for their firms. Investment performance is not a criterion, as client objectives and risk tolerances vary and advisors rarely have audited performance reports. SHOOK Research’s rankings provide opinions intended to help investors choose the right financial advisor and are not indicative of future performance or representative of any one client’s experience. Past performance is not indicative of future results. SHOOK Research’s rankings is for informational purposes only and should not be construed as a recommendation or endorsement to hire any specific investment advisor and SHOOK Research does not assume any liability for actions taken based on the rankings. Neither SHOOK Research nor Forbes receives compensation in exchange for placement on the rankings. For a full description of the methodology, please visit [www.SHOOKresearch.com](http://www.SHOOKresearch.com). SHOOK® is a registered trademark of SHOOK Research, LLC.

# The Full List



PROFILE SPOTLIGHT | PROMOTED

**Barry Mordis**

[VIEW PROFILE >](#)



PROFILE SPOTLIGHT | PROMOTED

**Justin Tipp**

[VIEW PROFILE >](#)



PROFILE SPOTLIGHT | PROMOTED

**Nicole Holmes**

[VIEW PROFILE >](#)

Join 1,000+ Listees Making the Most of their Forbes Accolade. [Learn About Benefits](#)

Listees do not pay a fee for placement on Forbes Rankings. Listees on this ranking highlighted in color have paid a fee for enhanced features on their corresponding profile. Use of Forbes list data, or commercial promotion of an appearance on a Forbes list is unauthorized without a license.

SEARCH BY NAME OR FIRM



Virginia - South

RANK ^	NAME	FIRM	CITY	STATE/REGION	MINIMUM ACCOUNT SIZE FOR NEW BUSINESS	TEAM ASSETS (CUSTODIED)	TYPICAL NET WORTH OF RELATIONSHIPS	TYPICAL SIZE OF HOUSEHOLD ACCOUNTS
1	<b>PROFILE SPOTLIGHT</b> <b>Joe Montgomery</b>	Wells Fargo Advisors	Williamsburg	Virginia - South	\$5M	\$1.7B	\$5-15M	\$5-10M
2	<b>PROFILE SPOTLIGHT</b> <b>Scott Garnett</b>	UBS Wealth Management	Richmond	Virginia - South	\$500K	\$1.1B	\$1.5-5M	\$750K-5M
3	<b>Mark Mellon</b>	Edward Jones	Midlothian	Virginia - South	\$500K	\$500M	\$1.6-8M	\$1.2-3.8M
4	<b>Philip Campbell</b>	Merrill Wealth Management	Norfolk	Virginia - South	\$2M	\$1.5B	\$3-60M	\$3.5-15M
5	<b>Brian Ford</b>	RBC Wealth Management	Richmond	Virginia - South	\$1M	\$1.2B	\$1.5-15M	\$10-25M

6	<b>Jim Fitzgerald</b>	Fitzgerald Financial Group   Northwestern Mutual	Richmond	Virginia - South	\$1M	\$1B	\$2.5-50M	\$2-20M
7	<b>John Lewis</b>	Rockefeller Capital Management	Richmond	Virginia - South	\$2.5M	\$2.5B	\$10-75M	\$5-50M
8	<b>Aashish Matani</b>	Merrill Wealth Management	Norfolk	Virginia - South	\$5M	\$1.4B	\$5-100M	\$5-25M
9	<b>Marc Cram</b>	Morgan Stanley Wealth Management	Richmond	Virginia - South	\$0	\$710M	\$2-15M	\$1-5M
10	<b>Scott Carr</b>	Wells Fargo Advisors	Suffolk	Virginia - South	\$3M	\$1.3B	\$8-12M	\$5.1-9.3M
11	<b>Jason King</b>	Ameriprise Financial Services	Richmond	Virginia - South	\$100K	\$947M	\$1-5M	\$250K-5M
12	<b>James Somers</b>	Merrill Private Wealth Management	Virginia Beach	Virginia - South	\$2.5M	\$2.1B	\$10M-2.5B	\$10-500M
13	<b>Pat Faulkner</b>	Towne Wealth Management   Raymond James	Williamsburg	Virginia - South	\$1M	\$965M	\$150K-10M	\$800K-7.1M
14	<b>Josh Mattox</b>	Morgan Stanley Wealth Management	Roanoke	Virginia - South	\$0	\$1B	\$1.5-6M	\$2-8M
15	<b>Wanda Austin</b>	Morgan Stanley Wealth Management	Newport News	Virginia - South	\$500K	\$864M	\$1.5-6M	\$1-5M
16	<b>John Gill</b>	Raymond James & Associates	Virginia Beach	Virginia - South	\$1M	\$1.5B	\$2.5-12.5M	\$1.2-6.5M
17	<b>Fritz Berry</b>	Truist Investment Services	Charlottesville	Virginia - South	\$2M	\$1.1B	\$5-100M	\$10-100M
18	<b>Brad Swartzwelder</b>	Ameriprise Financial Services	Midlothian	Virginia - South	\$500K	\$1.1B	\$1-7M	\$750K-5M
19	<b>Darren Mazzoni</b>	Merrill Wealth Management	Richmond	Virginia - South	\$1M	\$516M	\$1.5-30M	\$1-100M

20	<b>Scot Morris</b>	Raymond James Financial Services	Richmond	Virginia - South	\$500K	\$500M	\$1-50M	\$1-50M
21	<b>Stewart Barnes</b>	Ameriprise Financial Services	Roanoke	Virginia - South	\$250K	\$1.6B	\$500K-3.5M	\$350K-2M
22	<b>Kevin Williamson</b>	Ameriprise Financial Services	Midlothian	Virginia - South	\$250K	\$1.1B	\$1-10M	\$800K-6M
23	<b>Nate Johnson</b>	Merrill Wealth Management	Norfolk	Virginia - South	\$3M	\$1.5B	\$5-50M	\$2.5-30M
24	<b>Jay Poling</b>	Wells Fargo Advisors	Richmond	Virginia - South	\$2.5M	\$2.2B	\$3.5-100M	\$5-80M
25	<b>Brude Stoeber</b>	Stoeber & Palmore Investment Group	Richmond	Virginia - South	\$2M	\$1.1B	\$2-5M	\$3-5M
26	<b>Eric Parker</b>	Morgan Stanley Wealth Management	Charlottesville	Virginia - South	\$1M	\$402M	\$2-20M	\$1-10M
27	<b>Jay Headley</b>	Merrill Wealth Management	Richmond	Virginia - South	\$500K	\$843M	\$5-10M	\$5-10M
28	<b>PROFILE SPOTLIGHT David Elmore</b>	LPL Financial	Waynesboro	Virginia - South	\$1K	\$813M	\$150K-1.3M	\$95-150K
29	<b>Chris Beal</b>	Morgan Stanley Wealth Management	Newport News	Virginia - South	\$500K	\$1.5B	\$1-5M	\$750K-3M
30	<b>Michael Hancock</b>	Ameriprise Financial Services	Charlottesville	Virginia - South	\$25K	\$717M	\$500K-2M	\$300K-1M
31	<b>Rodney Duckworth</b>	UBS Wealth Management	Norfolk	Virginia - South	\$500K	\$689M	\$2-11M	\$150K-4M
32	<b>Canon Hickman</b>	Equity Concepts	Henrico	Virginia - South	\$500K	\$448M	\$1-100M	\$1-40M
33	<b>John Taylor</b>	Wells Fargo Advisors	Richmond	Virginia - South	\$500K	\$744M	\$1-35M	\$500K-5M
34	<b>Scott Singor</b>	UBS Wealth Management	Norfolk	Virginia - South	\$1M	\$688M	\$3-15M	\$1-10M
35	<b>Greg Watts</b>	Morgan Stanley Wealth Management	Virginia Beach	Virginia - South	\$500K	\$1.1B	\$2-5M	\$2-4.2M

36	<b>Craig Dunbar</b>	Morgan Stanley Wealth Management	Richmond	Virginia - South	\$1M	\$633M	\$2.5-10M	\$1-5M
37	<b>Roger Shawn</b>	Raymond James & Associates	Richmond	Virginia - South	\$500K	\$871M	\$1-15M	\$500K-10M
38	<b>William Moore III</b>	Stratview Wealth Management   Northwestern Mutual	Richmond	Virginia - South	\$500K	\$555M	\$1.5-50M	\$1-18M
39	<b>Mark Lange</b>	Morgan Stanley Wealth Management	Richmond	Virginia - South	\$500K	\$464M	\$1-15M	\$500K-10M
40	<b>Stamford Niou</b>	Morgan Stanley Wealth Management	Richmond	Virginia - South	\$0	\$243M	\$2-12M	\$1.2-5M
41	<b>Robert Bradshaw</b>	Merrill Wealth Management	Virginia Beach	Virginia - South	\$1M	\$1.5B	\$2-30M	\$2-25M
42	<b>Dan Sheehan</b>	Merrill Wealth Management	Charlottesville	Virginia - South	\$2M	\$893M	\$1.5-10M	\$850K-20M
43	<b>Jeremy Kuhlen</b>	Focus Partners Wealth	Richmond	Virginia - South	\$0	\$463M	\$2-20M	\$1.5-15M
44	<b>Bryan Beers</b>	Merrill Wealth Management	Williamsburg	Virginia - South	\$1M	\$588M	\$1.5-15M	\$1-15M
45	<b>Eric Bartok</b>	Oppenheimer	Virginia Beach	Virginia - South	\$1M	\$357M	\$2.5-4M	\$1-15M
46	<b>Dan Kleinschuster</b>	&Partners	Richmond	Virginia - South	\$50K	\$396M	\$1.5-10M	\$1.5-8M
47	<b>Richard Dickerson</b>	Merrill Wealth Management	Richmond	Virginia - South	\$500K	\$1.6B	\$500K-15M	\$800K-3M
48	<b>Randy Tootle</b>	Merrill Wealth Management	Richmond	Virginia - South	\$500K	\$1.6B	\$500K-15M	\$800K-3M
49	<b>Christopher Eastwood</b>	Edward Jones	Danville	Virginia - South	\$500K	\$382M	\$2-10M	\$500K-2M
50	<b>Leonard Levitch</b>	Ameriprise Financial Services	Richmond	Virginia - South	\$250K	\$1B	\$1.5-20M	\$1-10M

51	<b>John Higgins</b>	Wells Fargo Advisors	Charlottesville	Virginia - South	\$2M	\$633M	\$5-100M	\$3-40M
52	<b>PROFILE SPOTLIGHT Jon Schubert</b>	Resolute Private Wealth   Raymond James	Forest	Virginia - South	\$1M	\$490M	\$2-50M	\$1.5-30M
53	<b>Mike Kemp</b>	RBC Wealth Management	Roanoke	Virginia - South	\$1M	\$920M	\$2-20M	\$1-10M
54	<b>Brandon LaCroix</b>	Merrill Wealth Management	Roanoke	Virginia - South	\$500K	\$435M	\$2-20M	\$500K-33M
55	<b>Paul Higgins</b>	UBS Wealth Management	Roanoke	Virginia - South	\$2M	\$2.5B	\$5-35M	\$2-25M
56	<b>PROFILE SPOTLIGHT Mark Fonville</b>	Covenant Wealth Advisors	Richmond	Virginia - South	\$1M	\$781M	\$2-15M	\$1-5M
57	<b>Seth Kaplan</b>	Morgan Stanley Wealth Management	Richmond	Virginia - South	\$2.5M	\$369M	\$2.5-30M	\$1-10M
58	<b>Allan Strange</b>	Janney Montgomery Scott	Richmond	Virginia - South	\$250K	\$1.2B	\$3-5M	\$500K-2M
59	<b>Jonathan Chasen</b>	Wells Fargo Advisors	Charlottesville	Virginia - South	\$1M	\$655M	\$1-50M	\$850K-22M
60	<b>Chuck Jarrett</b>	Morgan Stanley Wealth Management	Newport News	Virginia - South	\$250K	\$439M	\$1-5M	\$250K-10M
61	<b>Pat McAleer</b>	Ameriprise Financial Services	Richmond	Virginia - South	\$1M	\$1B	\$2-6M	\$2-5M
62	<b>Thomas Ashbridge V</b>	Truist Investment Services	Richmond	Virginia - South	\$3M	\$542M	\$3-10M	\$3-10M
63	<b>W. Scott Mowry</b>	Legacy Financial Group   Raymond James	Williamsburg	Virginia - South	\$1M	\$590M	\$2-8M	\$1-5M
64	<b>Bart Edmunds</b>	SageCreek Planning & Investments   Commonwealth	Roanoke	Virginia - South	\$250K	\$566M	\$600K-2.5M	\$400K-1.5M

65	<b>Kelsey Beaulieu</b>	Morgan Stanley Wealth Management	Richmond	Virginia - South	\$1M	\$1.5B	\$1-10M	\$1-10M
66	<b>Joseph Bartholomew III</b>	Rockefeller Capital Management	Richmond	Virginia - South	\$2.5M	\$2.5B	\$10-75M	\$5-50M
67	<b>Matt Kurz</b>	Wells Fargo Advisors	Waynesboro	Virginia - South	\$750K	\$329M	\$1-5M	\$750K-2M
68	<b>Roger Kasch</b>	Ameriprise Financial Services	Glen Allen	Virginia - South	\$500K	\$1B	\$2.5-8M	\$1-5M
69	<b>Jim Martin</b>	Martin Wealth Solutions	Christiansburg	Virginia - South	\$500K	\$324M	\$1.5-15M	\$750K-7M
70	<b>Paul McWane</b>	Baird	Lynchburg	Virginia - South	\$500K	\$720M	\$2-100M	\$3-50M
71	<b>Kenneth Cadden</b>	Morgan Stanley Wealth Management	Richmond	Virginia - South	\$1M	\$703M	\$1.5-10M	\$750K-5M
72	<b>Rob Wood Jr.</b>	Raymond James & Associates	Richmond	Virginia - South	\$500K	\$335M	\$253K-12M	\$275K-3.4M
73	<b>Jay P. Moore</b>	Merrill Wealth Management	Richmond	Virginia - South	\$500K	\$899M	\$560K-14M	\$850K-2.4M
74	<b>Gregory H. Singletary</b>	Merrill Wealth Management	Richmond	Virginia - South	\$250K	\$899M	\$1-10M	\$800K-5M
75	<b>Ethan Lindbloom</b>	Janney Montgomery Scott	Richmond	Virginia - South	\$500K	\$402M	\$1-5M	\$750K-2M
76	<b>PROFILE SPOTLIGHT Gary Taylor</b>	Taylor Associates   Northwestern Mutual	Charlottesville	Virginia - South	\$0	\$420M	\$200K-20M	\$300K-10M
77	<b>Brock Petrie</b>	Merrill Wealth Management	Charlottesville	Virginia - South	\$500K	\$417M	\$750K-4M	\$500K-3.5M
78	<b>George Gordon</b>	Sage Wealth Advisors   Wells Fargo Advisors Financial Network	Richmond	Virginia - South	\$1M	\$2B	\$2-20M	\$1-20M
79	<b>Tim Mullins</b>	Sage Wealth Advisors   Wells	Richmond	Virginia - South	\$1M	\$2B	\$1-18M	\$2-18M

		Fargo Advisors Financial Network						
80	<b>Melissa Garrett</b>	Janney Montgomery Scott	Richmond	Virginia - South	\$500K	\$1.2B	\$3-5M	\$1-3M
81	<b>Andy Foldenauer</b>	RBC Wealth Management	Richmond	Virginia - South	\$750K	\$1.2B	\$1.5-10M	\$750K-10M
82	<b>Richard Blackwell</b>	Rockefeller Capital Management	Richmond	Virginia - South	\$2.5M	\$2.5B	\$10-75M	\$5-50M
83	<b>Adam Marr</b>	Wells Fargo Advisors	Newport News	Virginia - South	\$1M	\$531M	\$1-3M	\$750K-3M
84	<b>Nelson Ham</b>	Merrill Wealth Management	Charlottesville	Virginia - South	\$250K	\$295M	\$500K-5M	\$500K-3M
85	<b>Poonam Maheshwari</b>	Wells Fargo Advisors	Norfolk	Virginia - South	\$500K	\$276M	\$2-7M	\$750K-7M
86	<b>Greg S. Zittrain</b>	Merrill Wealth Management	Virginia Beach	Virginia - South	\$750K	\$337M	\$2-25M	\$500K-15M
87	<b>Mike Pendleton</b>	Edward Jones	Roanoke	Virginia - South	\$1M	\$408M	\$500K-4M	\$150K-3.5M
88	<b>David Gray</b>	Truist Investment Services	Richmond	Virginia - South	\$1M	\$1.5B	\$1.5-12M	\$1-10M
89	<b>Jonathan Wood</b>	Ameriprise Financial Services	Midlothian	Virginia - South	\$1M	\$1.4B	\$1.2-4.5M	\$250K-4.2M
90	<b>Shawn McMahon</b>	Morgan Stanley Wealth Management	Roanoke	Virginia - South	\$250K	\$600M	\$2.5-10M	\$1-7M
91	<b>Tommy Doyle</b>	Harvie Wealth Management Group   Wells Fargo Advisors Financial Network	Richmond	Virginia - South	\$25K	\$864M	\$500K-6M	\$200K-2.5M
92	<b>Holly Stallworth</b>	Atlantic Union Financial Consultants   Raymond James	Glen Allen	Virginia - South	\$250K	\$274M	\$250K-5M	\$500K-3M
93	<b>Todd Compton</b>	&Partners	Glen Allen	Virginia - South	\$1M	\$214M	\$1.5-7M	\$1-6M

94	<b>PROFILE SPOTLIGHT</b> <b>Rainer Schlichtherle</b>	CrossPoint Wealth Partners   Northwestern Mutual	Richmond	Virginia - South	\$250K	\$549M	\$2-4M	\$500K-2M
95	<b>Betty Schutte-Box</b>	Raymond James & Associates	Richmond	Virginia - South	\$1M	\$316M	\$1-31M	\$500K-1.5M
96	<b>Charles Heaton</b>	Merrill Wealth Management	Norfolk	Virginia - South	\$500K	\$226M	\$2-25M	\$1.2-3.5M
97	<b>Dalal Salomon</b>	Salomon & Ludwin	Richmond	Virginia - South	\$2M	\$1.2B	\$3-20M	\$2-14M
98	<b>Chuck Bull</b>	Wells Fargo Advisors	Charlottesville	Virginia - South	\$0	\$454M	\$1-6M	\$750K-5M
99	<b>CJ Carder</b>	Morgan Stanley Wealth Management	Williamsburg	Virginia - South	\$1M	\$864M	\$1-10M	\$1.1-3M
100	<b>Mike Grappone</b>	Wells Fargo Advisors	Richmond	Virginia - South	\$500K	\$795M	\$1.5-8M	\$500K-1.5M

← 1 2 →

1-100 of 149

[Read More](#)



## Methodology: Forbes America's Top Wealth Advisors 2026

BY R.J. SHOOK



## This \$6.6 Billion Advisor Specializes In Entrepreneurial Exits

BY SERGEI KLEBNIKOV

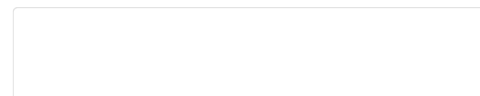
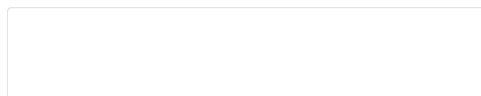
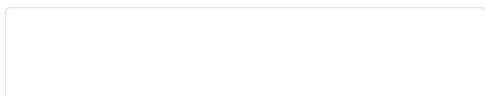


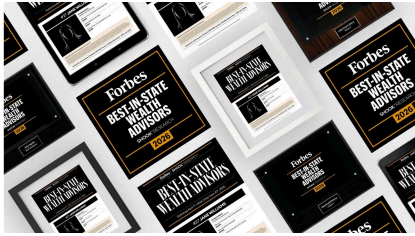
## This \$4.4 Billion Neuberger Berman Advisor Calls Her Firm Is A Safe Space For Clients

BY SERGEI KLEBNIKOV

# Amplify Your Forbes Recognition

Proudly showcase your success with Reprints & Display Products, Premium Profiles, and Award Logos.

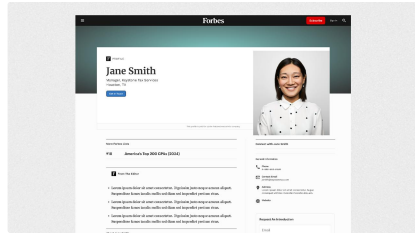




### Reprints & Display Products

Proudly showcase your Forbes accolade with plaques, wall displays, reprints, desktop awards, and more.

[Learn More](#)



### Premium Profiles

Maximize your presence on Forbes with a fully customized Premium Profile.

[Learn More](#)



### Award Logos

Leverage the power of Forbes by licensing the official logo to use in your marketing.

[Learn More](#)

## More Forbes Lists



America's Top Wealth Advisors



America's Top Women Wealth Advisors



Best-In-State Women Wealth Advisors