

Asset Management Firms

Rank 2016 2015	Business Address	Phone Company Email Website	Tot. Amt. of Assets Under Management	No. Professional Staff Including Partners	No. Offices: Local National	Specialties	Top Local Executives	Year Establ. Locally
1	TCI Wealth Advisors, Inc. 4011 E. Sunrise Dr. Tucson, AZ 85718	(520) 733-1477 tci@tcwealth.com tcwealth.com	\$2,054,561,496	52	1 7	TCI provides comprehensive, coordinated and objective financial advice designed to ensure that your financial decisions and resources are aligned with what you value most. We serve as a trusted advisor, acting as a fiduciary, for individuals and families who are looking to align their financial resources, values and goals.	Robert Swift Catherine Nichols John Stephens	1990
2	Wealth Management Partners 1980 E River Road #120 Tucson, AZ 85718	520-297-7999 thomas.curtis@raymondjames.com www.wmpaz.com	\$235,000,000	6	1 1	Comprehensive Financial Planning and Corporate Retirement Plans	Morgan Brown Thomas Curtis Robert Buehler	2005
3	Affinity Wealth Management 2960 N Swan Rd, Ste 215 Tucson, AZ 85712	520-795-3360 taunya.kvillicana@jpl.com www.affinitytucson.com	\$125,000,000	4	2 N/A	Wealth Management - Endowments / Foundations / Individuals	Angela Baurley, MBA Taunya Villicana	2002
4	Charles R Dunn Investment Advisors 5510 N. Camino Real Tucson, AZ 85718	520 544 2286 chuck@charlesrdunn.com charlesrdunn.com	\$100,000,000	5	1 1	Retirees, and near retirees business owners	Charles R Dunn	1992
5	Gordian Advisors 2200 E. River Rd., Suite 109 Tucson, AZ 85718	(520) 615-2779 info@gordianadvisors.com gordianadvisors.com	\$70,000,000	2	1 1	Financial planning, portfolio management	David Hamra Denis Smirnov Michael Burdick	2002
6	Vast Commercial Real Estate Solutions 5102 E. Pima St Tucson, AZ 85712	520-624-9400 info@vasttucson.com www.vasttucson.com	\$60,000,000	6	1 1	Commercial Real Estate Asset Management, Brokerage and Property Management	Rob Fischrup Jon O'Shea	2008
7	Advisor Services, Inc. 1 S. Church Ave Suite 1200 Tucson, AZ 85701	(520) 615-9517 info@advisorservices.net advisorservices.net	\$40,000,000	3	1 1	Portfolio management and 401k consulting	Larry Campuzano	1994
8	AIO Financial Planners 2531 E. Richards Pl. Tucson, AZ 85716	(520) 325-0769 info@aiofinancial.com aiofinancial.com	\$30,000,000	3	1 1	Fee only comprehensive financial planning, socially responsible investing	Bill Holliday Sylvia Matteson	2004
	Bourn Advisory Services, LLC 3915 E. Broadway, Ste. 100 Tucson, AZ 85711	(520) 323-1005 info@bourncompanies.com bourncompanies.com	N/A	N/A	N/A N/A	Retail, office, industrial	Don E. Bourn	1992
	ButtonWood Advisors LLC 1846 E. Innovation Park Dr. Oro Valley, AZ 85755	(520) 318-5543 office@buttonwoodadvisors.com buttonwoodadvisors.com	N/A	N/A	N/A N/A	Wealth management	Vic Hess	2003
	Encore Wealth Advisors¹ 3953 E. Paradise Falls Dr., Ste. 112 Tucson, AZ 85712	(520) 531-9977 mark@encorewealthadvisors.com encorewealthadvisors.com	N/A	N/A	N/A N/A	Retirement planning	Mark Stempel	2000
	Falbaum Investment Group 3430 E. Sunrise Dr, Ste. 250 Tucson, AZ 85718	(520) 615-4339 vance.falbaum@rbc.com rbfc.com	N/A	N/A	N/A N/A	N/A		N/A
	Morgan Stanley Smith Barney 5255 E. Williams Circle Tucson, AZ 85711	(520) 745-7069 onlinesupport@morganstanley.com morganstanley.com/online	N/A	N/A	N/A N/A	N/A		N/A
	Raskob Kambourian Financial Advisors, Ltd. 4100 N First Avenue Tucson, AZ 85719	(520) 690-1999 rkfin.com rkfin.com	N/A	N/A	1 1	fee only comprehensive life planning, trust services, tax prep and representation	Pat Raskob CFP, EA, ATA Steve Borden	1986
	RMH Group, LLC 1820 E. River Rd., Ste. 104 Tucson, AZ 85718	(520) 323-3800 N/A rmhwealth.com	N/A	N/A	N/A N/A	Tax and accounting	Barbara Ramsier Richard Mundingier	1980
	Southwest Investment Advisors, Inc. 7594 N. La Cholla Blvd. Tucson, AZ 85741	(520) 544-2500 Bart@SIATucson.Com www.siatucson.com	N/A	N/A	N/A N/A	Dave Ramsey endorsed local provider, asset and investment management	Bart Schannep Rob Wright Tom Cariseo	2001
	Stratton Advisors 11115 N. La Canada Dr., Ste. 281 Oro Valley, AZ 85737	(520) 742-6875 info@lindastrattonadvisors.com lindastrattonadvisors.com	N/A	N/A	N/A N/A	N/A		N/A
	Treiberg Wealth Management, Inc. 3573 E. Sunrise Dr., Ste. 115 Tucson, AZ 85718	(520) 232-0505 N/A lpl.com/treiberg	N/A	N/A	N/A N/A	Retirement income planning	Michael Treiberg	2001

¹ Previously Mark Stempel & Associates
Ranked by the number of assets under management
Ranked information is provided by business representatives at no charge and is ranked alphabetically in case of ties. Other businesses were contacted but either declined or did not respond by deadline. There is no charge to be included in Inside Tucson Business listings.
N/A=not provided WND=would not disclose NL=not listed last year NR=listd last year but ranking criteria not provided