

WEALTH MANAGEMENT FIRMS

Ranked by assets managed locally for fiscal year 2022

Rank	Company Address Website Phone	Logo	Total assets managed: 2022 2021 % + (-)	Services							Compensation			Min. investment account: Individual Institution	# of local portfolio managers or investment advisers	Top local exec.(s) CIO Year est. locally	Photo
				Financial planning	Brokerage services	Asset management	Estate planning	Life insurance/risk mgmt.	Other	Hourly	Commissions	Fixed fee	Performance-based fees				
1	Chandler Asset Management Inc. 6255 Lusk Blvd., San Diego 92121 www.chandlerasset.com 800-317-4747		\$28.6B \$25.8B 11	N	N	Y	N	N	N	N	N	Y	N	\$250,000 \$10,000,000	15	Nicole Drago Jayson Schmitt William Dennehy Scott Prickett 1988	
2	Wells Fargo Wealth Management 4465 Executive Drive, Suite 1000, San Diego 92121 www.wellsfargo.com/the-private-bank/san-diego-office/ 858-261-6230		\$26.2B \$27.7B (5)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	\$1,000,000 \$1,000,000	183	Joseph DeFalco 1855	
3	Merrill Lynch Wealth Management 701 B St., Suite 2400, San Diego 92101 www.ml.com 619-699-3700		\$25.7B \$24.0B 7	Y	Y	Y	Y	N	Y	N	Y	Y	N	\$250,000 \$10,000,000	165	Mark Kremers 1922	
4	UBS Financial Services Inc. 1200 Prospect St., Suite 100, La Jolla 92037 www.ubs.com 858-454-9181		\$23.1B \$22.0B 5	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	\$1,000,000 \$1,000,000	99	Justin Frame Solita Marcellelli 2001	
5	Brandes Investment Partners L.P. 4275 Executive Square, Fifth Floor, La Jolla 92037 www.brandes.com 858-755-0239		\$18.9B \$22.7B (17)	N	N	Y	N	N	N	N	N	N	N	\$100,000 ⁽¹⁾ \$10,000,000	22	Brent Woods Kenneth Little 1974	
6	Northern Trust 4747 Executive Drive, Suite 1100, San Diego 92121 www.northerntrust.com 858-824-1200		\$6.0B \$6.1B (2)	Y	Y	Y	Y	Y	Y	N	N	Y	N	\$3,000,000 \$50,000,000	13	Paul Thiel Angelo Manioudakis 1989	
7	J.P. Morgan Private Bank 12860 El Camino Real, Suite 200, San Diego 92130 www.privatebank.jpmorgan.com/san-diego 858-812-6131		\$6.0B \$5.4B 11	Y	Y	Y	Y	N	Y	N	N	N	N	\$5,000,000 \$0	30	Bambos Charalambous David Regan 2019	
8	LM Capital Group LLC 750 B St., Suite 3010, San Diego 92101 www.lmcapital.com 619-814-1401		\$4.6B \$4.9B (6)	N	N	Y	N	N	N	N	N	N	N	\$10,000,000 \$10,000,000	6	Luis Maizel John Chalker 1989	
9	HoyleCohen LLC 350 Camino de la Reina, Suite 500, San Diego 92108 www.hoylecohen.com 858-576-7300		\$2.7B \$3.2B (15)	Y	N	Y	Y	N	N	N	N	Y	N	\$1,000,000 \$1,000,000	21	Mark Delfino Vanessa Wieliczko 2001	
10	Pure Financial Advisors LLC 3131 Camino del Rio N., Suite 1550, San Diego 92108 www.purefinancial.com 619-814-4100		\$2.2B \$2.9B (26)	Y	N	Y	N	N	N	N	N	Y	N	\$0 \$0	8	Joseph Anderson Brian Perry 2007	
11	CoastEdge Partners LLC 888 Prospect St., Suite 220, La Jolla 92037 www.coastedge.com 858-997-2777		\$2.2B \$2.1B 1	N	N	Y	N	N	N	N	N	Y	N	\$5,000,000 \$5,000,000	5	Steve Simpson Rich Effress 2010	
12	Crest Capital Advisors 12680 High Bluff Drive, Suite 450, San Diego 92130 www.crestcapadv.com 858-356-6340		\$2.1B \$2.2B (5)	Y	N	Y	Y	Y	Y	N	N	Y	N	\$10,000,000 \$10,000,000	3	Drew Nordlicht David Molnar 2012	
13	AlphaCore Capital 875 Prospect St., Suite 315, San Diego 92037 www.alphacorewealth.com 858-875-4100		\$1.6B \$1.5B 12	Y	N	Y	Y	Y	Y	N	N	N	N	\$1,200,000 \$5,000,000	14	Dick Pfister 2015	
14	Callan Capital 1250 Prospect St., Suite 1, La Jolla 92037 www.callancapital.com 858-551-3800		\$1.5B \$1.5B 0	Y	N	Y	N	N	N	N	N	Y	N	\$2,000,000 \$2,000,000	6	Trevor Callan Ryan Callan Tim Callan 2007	
15	Mariner Wealth Advisors 11512 El Camino Real, Suite 370, San Diego 92130 www.marinerwealthadvisors.com 858-795-9000		\$1.1B \$1.2B (9)	Y	N	Y	Y	Y	Y	N	N	N	N	\$0 \$0	13	Kyle Quinn Katrina Scott 2011	

(NR) Not ranked

Sources: The firms and CPA/CFO-attested statements.

To the best of our knowledge, this information is accurate as of press time. While every effort is made to ensure the accuracy and thoroughness of the list, omissions and typographical errors sometimes occur. Please send corrections or additions to the Research Department at the San Diego

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(1) Through approved programs.