

From the Houston Business Journal

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## The List

# Largest Houston-Area Money Management Firms Ranked by Locally Managed Asset Volume

Locally Researched by: Madison Henry, Research Director, Houston Business Journal

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Staff *Houston Business Journal*

Information for this List was compiled from questionnaires completed by company representatives and HBJ research.

Rank	Company	Locally Managed Asset Volume	Local Portfolio Managers	Number of Local Support Staff for Portfolio Researchers and Managers	Total Number of Employees, Companywide	Total Companywide Asset Volume Under Management in 2013	Number of Local Full-Time Employees
1	<b>Invesco</b> 11 Greenway Plaza Suite 1000 Houston, TX 77046 800-959-4246 www.invesco.com	\$210,000,000,000	46	18	5,948	\$778,700,000,000	1,421
2	<b>Salient Partners LP</b> 4265 San Felipe Suite 800 Houston, TX 77027 713-993-4675 www.salientpartners.com	\$18,700,000,000	6	20	147	\$18,700,000,000	127
3	<b>Vaughan Nelson Investment Management</b> 600 Travis St. Suite 6300 Houston, TX 77002 713-224-2545 www.vaughannelson.com	\$10,300,000,000	7	9	40	\$10,300,000,000	40
4	<b>Monroe Vos Consulting Group Inc.</b> 1001 McKinney St. Suite 1200 Houston, TX 77002 713-227-0100 www.monroevos.com	\$5,500,000,000	4	6	17	\$5,400,000,000	15
5	<b>Avalon Advisors LLC</b> 2929 Allen Parkway Suite 3000 Houston, TX 77019 713-238-2050 www.avalonadvisors.com	\$5,400,000,000	8	4	45	\$5,400,000,000	45

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6	<b>Houston Trust Company</b> 1001 Fannin Suite 700 Houston, TX 77002 713-651-9400 www.houstontrust.com	\$4,340,235,000	10	6	16	\$4,420,271,000	16
7	<b>Eagle Global Advisors LLC</b> 5847 San Felipe Suite 930 Houston, TX 77057 713-952-3550 www.eagleglobal.com	\$4,210,000,000	6	8	29	\$4,210,000,000	29
8	<b>Bridgeway Capital Management, Inc.</b> 20 Greenway Plaza Suite 450 Houston, TX 77046 713-661-3500 www.bridgeway.com	\$3,337,399,705	5	8	24	\$3,337,000,000	24
9	<b>Stephens Investment Management Group LLC</b> 9 Greenway Plaza Suite 1900 Houston, TX 77046 713-993-4200 www.stephensimg.com	\$3,105,234,602	4	1	15	\$3,105,234,602	9
10	<b>Frost Bank - Frost Wealth Advisors</b> 1200 Smith St. Suite 1025 Houston, TX 77002 713-388-7869 www.frostbank.com	\$2,961,000,000	4	1	438	\$28,427,000,000	48
11	<b>Sentinel Trust Company</b> 2001 Kirby Drive 12th Floor Houston, TX 77019 713-559-9578 www.sentineltrust.com	\$2,578,000,000	6	2	41	\$2,578,000,000	41
12	<b>Linscomb &amp; Williams</b> 1400 Post Oak Blvd. Suite 1000 Houston, TX 77056 713-840-1000 www.linscomb-williams.com	\$2,249,530,229	11	11	36	\$2,249,530,229	34
13	<b>Kanaly Trust</b> 5555 San Felipe Suite 200 Houston, TX 77056 713-561-9300 www.kanaly.com	\$2,127,767,472	3	4	51	\$2,127,767,472	51

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14	<b>Woodway Financial Advisors</b> 10000 Memorial Drive Suite 650 Houston, TX 77024 713-683-7070 www.woodwayfinancial.com	\$1,531,000,000	5	1	28	\$1,531,000,000	28
15	<b>Tiras Wealth Management</b> 11 Greenway Plaza Suite 3000 Houston, TX 77046 713-332-4412 tiraswealth.com	\$1,278,703,000	2	6	11	\$1,721,000,000	11
16	<b>Atlantic Trust</b> 11 Greenway Plaza Suite 2625 Houston, TX 77046 832.941.5760 www.atlantictrust.com	\$1,071,900,900	4	6	200	\$23,970,000,000	10
17	<b>Tanglewood Wealth Management Inc.</b> 1400 Post Oak Blvd. Suite 550 Houston, TX 77056 713-840-8880 www.tanglewoodwealth.com	\$816,000,000	3	3	11	\$803,000,000	12
18	<b>Pennington Wealth Management</b> 11 Greenway Plaza Suite 3000 Houston, TX 77046 713-332-4422 penningtonwealth.com	\$776,496,573	2	9	12	\$972,745,373	11
19	<b>Hourglass Capital LLC</b> 4409 Montrose Blvd. Suite 100 Houston, TX 77006 713-936-0440 www.hourglasscapital.com	\$675,000,000	4	3	7	\$675,000,000	7
20	<b>Chilton Capital Management LLC</b> 1177 West Loop South Suite 1310 Houston, TX 77027 713-650-1995 www.chiltoncapital.com	\$671,338,471	7	12	29	\$1,183,625,678	28
21	<b>The Financial Advisory Group Inc.</b> 5599 San Felipe Suite 900 Houston, TX 77056 713-624-4210 www.finadvisors.com	\$670,000,000	2	6	10	\$670,000,000	10

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	<b>STA Wealth Management LLC</b>						
22	800 Town & Country Blvd. Suite 410 Houston, TX 77024 281-822-8800 www.stawealth.com	\$630,000,000	3	NA	14	\$630,000,000	20
	<b>Mercer Advisors</b>						
23	2245 Texas Drive Suite 260 Sugar Land, TX 77479 800-825-5152 www.merceradvisors.com	\$544,349,941	4	2	6	\$5,345,898,807	6
	<b>Patriot Wealth Management Inc.</b>						
24	1800 Bering Suite 250 Houston, TX 77057 713-344-9300 www.patriotwealth.com	\$534,747,000	2	1	18	\$1,249,718,000	18
	<b>Sequent Asset Management LLC</b>						
25	952 Echo Lane Suite 115 Houston, TX 77024 713-467-0008 www.sequentasset.com	\$503,000,000	3	1	6	\$503,000,000	5