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The List

Top Houston-Area Wealth Managers with Minimum Required Investment of \$5 Million or Greater Ranked by Assets Per Client

Locally Researched by: Madison Henry, Houston Business Journal

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Staff Houston Business Journal

Information for this List was obtained from questionnaires completed by company representatives. Think your practice belongs on a List? Contact mhenry@bizjournals.com to find out how to be surveyed for next year.

Rank	Practice Name	Company Name	Assets Per Client	Assets Managed for Local Clients	Local Clients	Local Wealth Advisors	Asset Mix
1	Bridgeway Capital Management Inc.	independent practice	\$111.247M	\$3.337B	30	NA	stocks
2	Sentinel Trust Company LBA	independent practice	\$75.824M	\$2.578B	34	8.0	stocks; institutional bonds; government bonds; money market funds; real estate; cash; other
3	Rushing Dodson and Associates	Merrill Lynch	\$40.000M	\$2.000B	50	4.0	stocks; institutional bonds; government bonds; money market funds; cash; other
4	Houston Trust Co.	independent practice	\$20.668M	\$4.340B	210	9.0	stocks; institutional bonds; government bonds; money market funds; real estate; cash; other

Rank	Practice Name	Company Name	Assets Per Client	Assets Managed for Local Clients	Local Clients	Local Wealth Advisors	Asset Mix
5	Smith, Graham & Co., Investment Advisors LP	independent practice	\$13.227M	\$238.077M	18	NA	institutional bonds; government bonds; cash