From the Houston Business Journal
:https://www.bizjournals.com/houston/subscriber-only/2016/03/18/-2016-money-management-firms.html

The List

Largest Houston-Area Money Management Firms Ranked by Locally Managed Assets 2015

Locally Researched by: Madison Henry, Houston Business Journal

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Staff *Houston Business Journal*

Information for The List was obtained by questionnaires completed by firm representatives and HBJ research. Not all information could be independently verified by the Houston Business Journal. Think your company belongs on The List? Contact the research director, Madison Henry, at mhenry@bizjournals.com for more information.

Rank	Company Name	Locally Managed Assets 2015	Local FTE Employees	Asset Mix	Asset Mix 2015-Q1	Top Local Executive	Headquarters
1	**Fayez Sarofim & Co.** 2 Houston Center, 909 Fannin St. #2907 Houston, TX 77010 713-654-4484 sarofim.com	$23.28 billion	92	stocks; institutional bonds; government bonds	stocks; institutional bonds; government bonds	Fayez Sarofim, chairman Gentry Lee, CEO	Houston
2	**Vaughan Nelson Investment Management** 600 Travis St. #6300 Houston, TX 77002 713-224-2545 vaughannelson.com	$12.47 billion	43	stocks; institutional bonds; government bonds; cash	stocks; institutional bonds; government bonds	Chris Wallis, CEO/chief investment officer	Houston
3	**Garcia Hamilton & Associates LP** 1401 McKinney St. #1600 Houston, TX 77010 713-853-2359 garciahamiltonassociates.com	$6.34 billion	28	institutional bonds; government bonds; cash	NA	Ruby Dang, partner/director of marketing & client service ruby@garciahamiltonassociates.com	Houston
4	**Capstone Asset Management Co.** 3700 W. Sam Houston Pkwy. S. #250 Houston, TX 77042 713-260-9000 capstonefinancial.com	$4.94 billion	42	stocks; institutional bonds; government bonds; money market funds; cash; other	stocks; institutional bonds; government bonds; money market funds; cash; other	Michael L. Kern, III, CEO/president mkern@capstonefinancial.com	Houston
5	**Monroe Vos Consulting Group Inc.** 1001 McKinney St. #1200 Houston, TX 77002 713-227-0100 monroevos.com	$4.7 billion	14	stocks; institutional bonds; government bonds; money market funds; real estate; cash; other	stocks; institutional bonds; government bonds; money market funds; real estate; cash; other	Jamison Monroe, chairman/CEO jmonroe@monroevos.com	Houston

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6	**Avalon Advisors LLC** 2929 Allen Pkwy #3000 Houston, TX 77019 713-238-2050 avalonadvisors.com	$4.32 billion	56	stocks; institutional bonds; government bonds; cash	NA	Henry Lartigue, managing partner/chief investment officer	Houston
7	**Houston Trust Co.** 1001 Fannin #700 Houston, TX 77002 713-651-9400 houstontrust.com	$4.15 billion	23	stocks; institutional bonds; government bonds; money market funds; real estate; cash	stocks; institutional bonds; government bonds; money market funds; real estate; cash	David Lummis, president/CEO dlummis@houstontrust.com	Houston
8	**Eagle Global Advisors LLC** 5847 San Felipe #930 Houston, TX 77057 713-952-3550 eagleglobal.com	$3.9 billion	33	stocks; institutional bonds; government bonds; other	stocks; institutional bonds; government bonds	Thomas Hunt, senior partner Edward Allen, senior partner Steven Russo, senior partner srusso@eagleglobal.com	Houston
9	**Sentinel Trust Company LBA** 2001 Kirby Dr. 12th Fl. Houston, TX 77019 713-559-9578 sentineltrust.com	$3.38 billion	43	stocks; institutional bonds; government bonds; money market funds; real estate; cash; other	NA	Bruce Swanson, chief investment officer bswanson@sentineltrust.com	Houston
10	**Stephens Investment Management Group LLC** 9 Greenway Plz. #1900 Houston, TX 77046 713-993-4200 stephensimg.com	$2.93 billion	10	stocks	stocks	Ryan Crane, chief investment officer rcrane@stephens.com	Little Rock, AR
11	**Linscomb & Williams** 1400 Post Oak Blvd. #1000 Houston, TX 77056 713-840-1000 linscomb-williams.com	$2.31 billion	43	NA	stocks; institutional bonds; government bonds; money market funds; cash	J. Harold Williams, president/CEO hwilliams@linscomb-williams.com	Houston
12	**Tiras Wealth Management** 11 Greenway Plz. #3000 Houston, TX 77046 713-332-4350 tiraswealth.com	$2.09 billion	12	NA	stocks; government bonds; money market funds; real estate; cash; other	Scott Tiras, president scott.b.tiras@ampf.com Crystal Garrett, SVP crystal.l.garrett@ampf.com	Houston
13	**Patriot Wealth Management Inc.** 1800 Bering #250 Houston, TX 77057 713-344-9300 patriotwealth.com	$1.46 billion	18	stocks; institutional bonds; government bonds; money market funds; cash	stocks; institutional bonds; government bonds; money market funds; cash	Robert Leslie, chief investment officer robert@patriotwealth.com	Houston

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14	**Woodway Financial Advisors** 10000 Memorial Dr. #650 Houston, TX 77024 713-683-7070 woodwayfinancial.com	$1.3 billion	25	NA	stocks; institutional bonds; government bonds; money market funds; cash	William Cunningham, president wcunningham@woodwayfinancial.com	Houston
15	**The Mitchell Group Inc.** 1100 Louisiana St. #5000 Houston, TX 77002 713-759-2070 tmgenergy.com	$856 million	8	stocks	stocks	Bradley Mitchell, president b.mitchell@tmgenergy.com Douglas Hoherz, chief investment officer	Houston
16	**Tanglewood Wealth Management Inc.** 1400 Post Oak Blvd. #550 Houston, TX 77056 713-840-8880 tanglewoodwealth.com	$816.5 million	12	NA	money market funds; other	John Merrill, president jmerrill@tanglewoodwealth.com	Houston
17	**Chilton Capital Management LLC** 1177 W. Loop S. #1310 Houston, TX 77027 713-650-1995 chiltoncapital.com	$806.04 million	31	NA	stocks; government bonds; real estate; cash	David Underwood, president/chief compliance officer dunderwood@chiltoncapital.com Christopher Knapp, CEO cknapp@chiltoncapital.com	Houston
18	**Pennington Wealth Management** 11 Greenway Plz. #3000 Houston, TX 77046 713-332-4422 penningtonwealth.com	$790.7 million	13	NA	stocks; government bonds; money market funds; cash; other	Darrell Pennington, managing partner darrell.r.pennington@ampf.com	Houston
19	**The Financial Advisory Group Inc.** 5599 San Felipe St. #900 Houston, TX 77056 713-627-7660 finadvisors.com	$740 million	20	stocks; institutional bonds; government bonds; cash; other	stocks; institutional bonds; government bonds; other	Steve Estrin, chairman sestrin@finadvisors.com	Houston
20	**Sequent Asset Management LLC** 952 Echo Ln. #115 Houston, TX 77024 713-467-0008 sequentasset.com	$514 million	5	stocks; institutional bonds; government bonds; money market funds; real estate; cash	stocks; institutional bonds; government bonds; money market funds; real estate; cash; other	David Doll, founder/CEO ddoll@sequentasset.com Tim Hartzell, founder/chief investment officer thartzell@sequentasset.com	Houston
21	**Financial Synergies Asset Management Inc.** 4265 San Felipe St. #1450 Houston, TX 77027 713-623-6600 finsyn.com	$475 million	8	stocks; institutional bonds; government bonds; money market funds; real estate; cash	stocks; institutional bonds; government bonds; money market funds; real estate; cash; other	Mike Booker, president/senior partner mbooker@finsyn.com	Houston

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22	**Branson, Fowlkes & Company Inc.** 3300 Chimney Rock Rd. #100-B Houston, TX 77056 713-780-0606 bransonfowlkes.com	$219 million	8	stocks; institutional bonds; money market funds; real estate; cash; other	stocks; institutional bonds; government bonds; money market funds; real estate; cash; other	Jay Branson, president jbranson@bransonfowlkes.com Maco Fowlkes, principal mfowlkes@bransonfowlkes.com	Houston