

THE LIST

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LARGEST HOUSTON-AREA MONEY MANAGEMENT FIRMS

RANKED BY 2019 LOCALLY MANAGED ASSETS

Company name (prior rank) ¹ Website	Address Phone	Locally managed assets 2019	Total managed assets 2019	Asset mix	Top local executive	Headquarters
1 Fayez Sarofim & Co. ① sarofim.com	2 Houston Center, 909 Fannin St., #2907 Houston, TX 77010 713-654-4484	\$21.72 billion	\$21.72 billion	stocks; institutional bonds and government bonds	Gentry Lee, CEO/co-CIO Fayez Sarofim, chairman/co-CIO	Houston
2 Garcia Hamilton & Associates LP ② garciahamiltonassociates.com	Five Houston Center, 1401 McKinney St., #1600 Houston, TX 77010 713-853-2359	\$15 billion	\$15 billion	institutional bonds; government bonds and cash	Gilbert Garcia, managing partner	Houston
3 Vaughan Nelson Investment Management ③ vaughannelson.com	600 Travis St., #6300 Houston, TX 77002 713-224-2545	\$13.01 billion	\$13.06 billion	stocks; institutional bonds; government bonds and cash	Chris Wallis, CEO/CIO	Houston
4 Avalon Investment & Advisory ⑤ avalonadvisors.com	2929 Allen Pkwy., #3000 Houston, TX 77019 713-238-2050	\$7.63 billion	\$8.27 billion	stocks; institutional bonds; government bonds; money market funds and cash	Chase Robison, president/CEO	Houston
5 Bridgeway Capital Management Inc. ④ bridgeway.com	20 Greenway Plz., #450 Houston, TX 77046 713-661-3500	\$7.5 billion	\$7.5 billion	stocks	John Montgomery, founder/CIO Tammira Philippe, president/CEO tphilippe@bridgeway.com	Houston
6 Houston Trust Co. * houstontrust.com	3737 Buffalo Speedway, #200 Houston, TX 77098 713-651-9400	\$7.2 billion	\$7.2 billion	stocks; institutional bonds; government bonds; real estate and cash	David Lummis, president/CEO dlummis@houstontrust.com	Houston
7 Smith, Graham & Co. Investment Advisors LP ⑥ smithgraham.com	600 Travis St., #6900 Houston, TX 77002 713-227-1100	\$6 billion	\$6 billion	stocks; institutional bonds; government bonds; cash and other	Gerald Smith, chairman/CEO gbsmith@smithgraham.com	Houston
8 Stephens Investment Management Group LLC ⑧ stephensimg.com	9 Greenway Plz., #1900 Houston, TX 77046 713-993-4200	\$5.53 billion	\$5.53 billion	stocks	Ryan Crane, CIO rrcrane@stephens.com	Little Rock, AR
9 Monroe Vos Consulting Group Inc. * monroevos.com	1001 McKinney St., #1200 Houston, TX 77002 713-227-0100	\$5.32 billion	\$5.71 billion	stocks; institutional bonds; government bonds; money market funds; real estate; cash and other	Jamison Monroe, chairman/CEO jmonroe@monroevos.com	Houston
10 Crossmark Global Investments ⑧ crossmarkglobal.com	15375 Memorial Dr., 200 Houston, TX 77079 713-260-9000	\$4.92 billion	\$4.92 billion	stocks; institutional bonds; government bonds and cash	Michael L. Kern III, CEO/ president	Houston
11 Sentinel Trust Company, LBA * sentineltrust.com	2001 Kirby Dr., #1200 Houston, TX 77019 713-529-3729	\$4.2 billion	\$4.2 billion	stocks; institutional bonds; government bonds; money market funds; real estate; cash and other	Lissa S. Gangjee, president/CEO	Houston
12 Eagle Global Advisors ⑩ eagleglobal.com	1330 Post Oak Blvd., #3000 Houston, TX 77056 713-952-3550	\$2.63 billion	\$2.63 billion	stocks; institutional bonds; government bonds; money market funds; cash and other	Eddie Allen, senior partner/ portfolio manager EAllen@eagleglobal.com	Houston
13 Frost Wealth Advisors ⑪ frostbank.com	1700 Post Oak Blvd., 4th Fl. Houston, TX 77056 713-388-7869	\$2.53 billion	\$14.66 billion	stocks; institutional bonds; government bonds; money market funds; real estate; cash and other	Garrick Behelfer, VP	San Antonio, TX
14 Tiras Wealth Management ⑫ tiraswealth.com	11 Greenway Plz., #3000 Houston, TX 77046 713-332-4400	\$2.43 billion	\$2.43 billion	stocks; institutional bonds; government bonds; money market funds; real estate; cash and other	Scott Tiras, president scott.b.tiras@ampf.com Crystal Garrett, SVP crystal.l.garrett@ampf.com	Houston
15 STA Wealth Mangement LLC ⑭ stawealth.com	800 Town and Country Blvd., 410 Houston, TX 77024 281-822-8800	\$1.8 billion	\$1.8 billion	stocks; institutional bonds; government bonds; money market funds; real estate and cash	Luke Patterson, CEO/CIO/ partner luke@stawealth.com	Houston
16 CAZ Investments ⑮ cazinvestments.com	1 Riverway, #2000 Houston, TX 77056 713-403-8250	\$1.43 billion	\$1.43 billion	stocks; institutional bonds; government bonds; money market funds; real estate; cash and other	Christopher Zook, chairman/CIO	Houston
17 CAPTRUST * captrust.com	3663 N. Sam Houston Pkwy. East, #620 Houston, TX 77097 713-660-9605	\$1.36 billion	\$351.3 billion	other	John Matejka, VP/financial advisor john.matejka@captrust.com David Stix, SVP/financial advisor David.Stix@captrust.com	Raleigh, NC
18 Pennington Wealth Management ⑰ penningtonwealth.com	11 Greenway Plz., #3000 Houston, TX 77046 713-332-4422	\$1.24 billion	\$1.24 billion	stocks; institutional bonds; government bonds; money market funds; cash and other	Darrell Pennington, managing partner darrell.r.pennington@ampf.com	Houston
19 Tectonic Financial/Sanders Morris Harris ⑱ smhgroup.com	600 Travis St., 59th Fl. Houston, TX 77002 713-224-3100	\$1.2 billion	\$4 billion	stocks; institutional bonds; government bonds; money market funds; real estate; cash and other	George Ball, chairman/CEO	Houston
20 Chilton Capital Management LLC * chiltoncapital.com	1177 W. Loop S., #1750 Houston, TX 77027 713-650-1995	\$1.19 billion	\$1.59 billion	stocks; institutional bonds; government bonds; money market funds; real estate and cash	Mike Rome, CEO mrome@chiltoncapital.com	Houston, TX
21 Tanglewood Total Wealth Management Inc. * tanglewoodwealth.com	1400 Post Oak Blvd., #550 Houston, TX 77056 713-840-8880	\$1.12 billion	\$1.12 billion	stocks; institutional bonds; government bonds; money market funds; real estate and cash	John Merrill, president/CIO jmerrill@tanglewoodwealth.com	Houston
22 CIBC Private Wealth Management ⑲ wealth.us.cibc.com	11 Greenway Plz., #2625 Houston, TX 77046 832-941-5760	\$1.1 billion	\$59.26 billion	stocks; institutional bonds; money market funds; real estate; cash and other	H. Scott Caven scott.caven@cibc.com Bas Solleveld, managing director/co-heads	Atlanta, GA
23 Adell, Harriman & Carpenter Inc. * ahcinvest.com	2700 Post Oak Blvd., #1200 Houston, TX 77056 713-621-1155	\$900 million	\$900 million	stocks; institutional bonds; government bonds and other	Stephen Adell, financial advisor/ investment manager	Houston
24 The Magnolia Group at Morgan Stanley * advisor.morganstanley.com/the-whitehead-group	2800 Post Oak Blvd., #1800 Houston, TX 77056 713-965-5060	\$750 million	\$2.3 trillion	stocks; institutional bonds; government bonds; money market funds; cash and other	Donald Whitehead, executive director donald.whitehead@ms.com	New York, NY
25 Sequent Asset Management LLC ⑳ sequentasset.com	952 Echo Ln., #312 Houston, TX 77024 713-467-0008	\$637 million	\$637 million	stocks; institutional bonds; government bonds; money market funds; real estate; cash and other	David Doll, founder/CEO ddoll@sequentasset.com Tim Hartzell, founder/CIO thartzell@sequentasset.com	Houston

¹ * = not ranked on prior List

² SMH Group = Houston Ventures

► CLOSER LOOK

19%

Total year-over-year percent growth from all companies on The List.

ABOUT THE LIST
Information was obtained from firm representatives. Information on The List was supplied by individual companies through questionnaires and could not be independently verified by the Houston Business Journal. Only those that responded to our inquiries were listed. In case of ties, companies are listed alphabetically.

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N/A = information not available