

# HOUSTON BUSINESS JOURNAL

## THE LIST

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## LARGEST HOUSTON-AREA MONEY MANAGEMENT FIRMS

RANKED BY ASSETS MANAGED BY THE HOUSTON-AREA OFFICE IN 2015

Company Name Website	Address Phone	Locally Managed Assets 2015	Local FTE Employees	Asset Mix	Top Local Executive	Headquarters Year Founded Locally
<b>1</b> Faye Sarofim & Co. <sup>②</sup> sarofim.com	2 Houston Center, 909 Fannin St., #2907 Houston, TX 77010 713-654-4484	\$23.28 billion	92	Stocks; institutional bonds and government bonds	Faye Sarofim, chairman Gentry Lee, CEO	Houston 1958
<b>2</b> Vaughan Nelson Investment Management <sup>④</sup> vaughannelson.com	600 Travis St., #6300 Houston, TX 77002 713-224-2545	\$12.47 billion <sup>1</sup>	43	Stocks; institutional bonds; government bonds and cash	Chris Wallis, CEO/chief investment officer	Houston 1970
<b>3</b> Garcia Hamilton & Associates LP <sup>Ⓢ</sup> garciahamiltonassociates.com	1401 McKinney St., #1600 Houston, TX 77010 713-853-2359	\$6.34 billion	28	Institutional bonds; government bonds and cash	Ruby Dang, partner/director of marketing & client service ruby@garciahamiltonassociates.com	Houston 1988
<b>4</b> Capstone Asset Management Co. capstonefinancial.com	3700 W. Sam Houston Pkwy. S., #250 Houston, TX 77042 713-260-9000	\$4.94 billion	42	Stocks; institutional bonds; government bonds; money market funds; cash and other	Michael L. Kern, III, CEO/president mkern@capstonefinancial.com	Houston 1987
<b>5</b> Monroe Vos Consulting Group Inc. monroevos.com	1001 McKinney St., #1200 Houston, TX 77002 713-227-0100	\$4.7 billion	14	Stocks; institutional bonds; government bonds; money market funds; real estate; cash and other	Jamison Monroe, chairman/CEO jmonroe@monroevos.com	Houston 1994
<b>6</b> Avalon Advisors LLC <sup>Ⓢ</sup> avalonadvisors.com	2929 Allen Pkwy, #3000 Houston, TX 77019 713-238-2050	\$4.32 billion	56	Stocks; institutional bonds; government bonds and cash	Henry Lartigue, managing partner/chief investment officer	Houston 2001
<b>7</b> Houston Trust Co. <sup>Ⓢ</sup> houstrust.com	1001 Fannin, #700 Houston, TX 77002 713-651-9400	\$4.15 billion	23	Stocks; institutional bonds; government bonds; money market funds; real estate and cash	David Lummis, president/CEO dlummis@houstrust.com	Houston 1994
<b>8</b> Eagle Global Advisors LLC <sup>Ⓢ</sup> eagleglobal.com	5847 San Felipe, #930 Houston, TX 77057 713-952-3550	\$3.9 billion	33	Stocks; institutional bonds; government bonds and other	Thomas Hunt, senior partner Edward Allen, senior partner Steven Russo, senior partner sruosso@eagleglobal.com	Houston 1996
<b>9</b> Sentinel Trust Company LBA <sup>Ⓢ</sup> sentineltrust.com	2001 Kirby Dr., 12th Fl. Houston, TX 77019 713-559-9578	\$3.38 billion	43	Stocks; institutional bonds; government bonds; money market funds; real estate; cash and other	Bruce Swanson, chief investment officer bswanson@sentineltrust.com	Houston 1997
<b>10</b> Stephens Investment Management Group LLC <sup>Ⓢ</sup> stephensimg.com	9 Greenway Plz., #1900 Houston, TX 77046 713-993-4200	\$2.93 billion	10	Stocks	Ryan Crane, chief investment officer rcrane@stephens.com	Little Rock, AR 2004
<b>11</b> Linscomb & Williams <sup>Ⓢ</sup> linscomb-williams.com	1400 Post Oak Blvd., #1000 Houston, TX 77056 713-840-1000	\$2.31 billion	39	Stocks; institutional bonds; government bonds; money market funds and cash	J. Harold Williams, president/CEO hwilliams@linscomb-williams.com	Houston 1971
<b>12</b> Tiras Wealth Management <sup>Ⓢ</sup> tiraswealth.com	11 Greenway Plz., #3000 Houston, TX 77046 713-332-4350	\$2.09 billion	12	Stocks; 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 1988
<b>13</b> Patriot Wealth Management Inc. <sup>Ⓢ</sup> patriotwealth.com	1800 Bering, #250 Houston, TX 77057 713-344-9300	\$1.46 billion	18	Stocks; institutional bonds; government bonds; money market funds and cash	Robert Leslie, chief investment officer robert@patriotwealth.com	Houston 2004
<b>14</b> Woodway Financial Advisors <sup>Ⓢ</sup> woodwayfinancial.com	10000 Memorial Dr., #650 Houston, TX 77024 713-683-7070	\$1.3 billion	25	Stocks; institutional bonds; government bonds; money market funds and cash	William Cunningham, president wcunningham@woodwayfinancial.com	Houston 1982
<b>15</b> The Mitchell Group Inc. <sup>Ⓢ</sup> tmenergy.com	1100 Louisiana St., #5000 Houston, TX 77002 713-759-2070	\$856 million	8	Stocks	Bradley Mitchell, president b.mitchell@tmenergy.com Douglas Hoherz, chief investment officer	Houston 1989
<b>16</b> Tanglewood Wealth Management Inc. <sup>Ⓢ</sup> tanglewoodwealth.com	1400 Post Oak Blvd., #550 Houston, TX 77056 713-840-8880	\$816.5 million	12	Money market funds and other	John Merrill, president jmerrill@tanglewoodwealth.com	Houston 1979
<b>17</b> Chilton Capital Management LLC chiltoncapital.com	1177 W. Loop S., #1310 Houston, TX 77027 713-650-1995	\$806.04 million	31	Stocks; government bonds; real estate and cash	David Underwood, president/chief compliance officer dunderwood@chiltoncapital.com Christopher Knapp, CEO cknapp@chiltoncapital.com	Houston 1996
<b>18</b> Pennington Wealth Management <sup>Ⓢ</sup> penningtonwealth.com	11 Greenway Plz., #3000 Houston, TX 77046 713-332-4422	\$790.7 million	13	Stocks; government bonds; money market funds; cash and other	Darrell Pennington, managing partner darrell.r.pennington@ampf.com	Houston 1995
<b>19</b> The Financial Advisory Group Inc. finadvisors.com	5599 San Felipe St., #900 Houston, TX 77056 713-627-7660	\$740 million	20	Stocks; institutional bonds; government bonds; cash and other	Steve Estrin, chairman sestrin@finadvisors.com	Houston 1997
<b>20</b> Sequent Asset Management LLC <sup>Ⓢ</sup> sequentasset.com	952 Echo Ln., #115 Houston, TX 77024 713-467-0008	\$514 million	5	Stocks; institutional bonds; government bonds; money market funds; real estate and cash	David Doll, founder/CEO ddoll@sequentasset.com Tim Hartzell, founder/chief investment officer thartzell@sequentasset.com	Houston 2008
<b>21</b> Financial Synergies Asset Management Inc. finsyn.com	4265 San Felipe St., #1450 Houston, TX 77027 713-623-6600	\$475 million	8	Stocks; institutional bonds; government bonds; money market funds; real estate and cash	Mike Booker, president/senior partner mbooker@finsyn.com	Houston 1986
<b>22</b> Branson, Fowlkes & Company Inc. bransonfowlkes.com	3300 Chimney Rock Rd., #100-B Houston, TX 77056 713-780-0606	\$219 million	8	Stocks; institutional bonds; money market funds; real estate; cash and other	Jay Branson, president jbranson@bransonfowlkes.com Maco Fowlkes, principal mfowlkes@bransonfowlkes.com	Houston 1991

<sup>1</sup> Reported incorrectly last year

