



CAPITAL SCHOOL

Making Dollars & Cents Out of Raising Capital

FAMILY OFFICE DIRECTORY

Over 350 Family Offices Organized by State.





A personal note from Brad:

I hope you find tremendous value in the Family Office Directory. On behalf of my team and myself, I am SO excited to share this information with you. This directory of single and multi-family offices is organized alphabetically and includes names, addresses, phone numbers, and more.

Inside this guide, I want to share information with you that I know will help you approach these offices. Many of these offices have an interest in alternative investments (*things like real estate, energy, precious metals and more*).

I hope that this guide solves one of the major problems people have wanting to approach family offices – where do I get a comprehensive guide of offices to call on.

After speaking with many entrepreneurs and business owners all over the world, I understand how frustrating and overwhelming it can be trying to raise investor capital. This directory should become your new tool in reaching out to these groups.

Using the information and resources provided, I have no doubt that, if used, you will be on the fast-track to experience the same growth & success that so many others have experienced in calling on these firms and groups.

Brad Blazar

Founder – Capital School

Hey, if you want to learn how to do a better job of approaching family offices, preparing a pitch deck that sells your idea and understanding the key principles to success in the family office and advisory space check out my Capital School coaching and mentorship program. It's the same coaching program that students have used in countries ALL over the world to learn how to attract, raise and close HNW investor capital so they can build, buy, or scale their business – or fund a special project like real estate.

Learn more here and enroll today!

>> [Let's get started today](#) <<

Family Office Directory

Single and Multiple Family Offices

Alabama

1. Arlington Capital Advisors

Ken Polk, CPA, CFP

<https://arlingtonfamilyoffices.com>

2000 Morris Avenue

Suite 1300

Birmingham, AL 35203

(205) 488-4300

2. Keel Point Horizon

Joe Agee – Chief Business Development Officer

Multiple Offices – Huntsville, AL, Washington, DC, Birmingham, AL, Chattanooga, TN,

Greenville, NC, Leawood, KS, Nashville, TN

<https://www.keelpoint.com/family-office>

29 Olmstead Street

Birmingham, AL 35243

(256) 261-3621

3. Machen McChesney

Martin Williams, Managing Partner

<https://machenmcchesney.com>

1784 Taliaferro Trail, Suite A

Montgomery, AL 36117

(334) 244-8900

4. McKinney Capital

Eric Essary – Partner

<https://mckinneycapital.net>

One Metroplex Drive, Suite 260

Birmingham, Alabama 35209

(205) 697-1837

5. Timberline Venture Capital Investments

Joe McCarty

<https://timberlineholdings.com>

3800 Colonnade Parkway, Suite 430

Birmingham, AL 35243

(205) 259-2060

6. Warren Averett

Joshua Reidinger, CPA / President
<https://waasset.com>
Alabama, Georgia, Florida Offices
600 University Park PL, #501
Birmingham, Alabama 35209
(205) 979-4100

7. Wilkins Miller Wealth Management

Greg A Bowen, CFA, CFP
41 W. I-65 Service Road, N.
Suite 400
Mobile, AL 36608
(251) 410-6700

Alaska Family Offices

1. Latash Investments

Gary Dalton
301 W Northern Lights Blvd Suite 412,
Anchorage, AK 99503
(907) 868-7580

Arizona Family Offices

1. Athlete Wealth Management (AWM)

Brandon Averill, CFP. CPWA, CIPM
<https://awmcap.com>
11201 N Tatum Blvd Ste 300
Phoenix, Arizona 85028
(323) 940-1339

2. Heritage Family Offices

Ralph Nelson, JD, CPA / Partner
<https://www.heritagefo.com>
Offices in Arizona and California
2355 East Camelback Road, Suite 330
Phoenix, Arizona 85016
(602) 775-5400

3. Meristem family Wealth

James Robbins, CIMA
<https://www.meristemfw.com>
Minnesota, Arizona, Florida, South Dakota
18801 N. Thompson Peak Parkway, Suite 320
Scottsdale, AZ 85255
(888) 835-2577

4. Pivotal Group

F. Francis Najafi

<https://pivotalgroup.com>

3200 East Camelback Road, Suite 295

Phoenix, AZ 85018

(602) 956-7200

5. Silverhawk Private Wealth

Paul Mershon, CFP, CLU, ChFC, RHU / Founder

<https://silverhawkfinancial.com>

Arizona, California, Tennessee

21090 N. Pima Road

Scottsdale, AZ 85255

(480) 296-0200

6. TFO Phoenix

Ryan Amy, CPA, CFP

<https://tfophoenix.com>

5060 North 40th Street,

Ste. 200

Phoenix, AZ 85018

(602) 466-2611

7. The Day family Office / Timothy Day

Leslie Pellillo

<https://tdayfoundation.org>

8. Tilton and Company

James Tilton, CPA

<https://www.tiltonco.com>

4015 S. McClintock Dr., Suite 105

Tempe, AZ, 85282

(480) 897-7708

Arkansas Family Offices

1. Dozier Capital Partners

<https://doziercapital.com>

Nicholas Dozier / Bradley McBride, CFA

1800 S 52nd Street

Rogers, AR 72758

(479) 957-9124

2. Gadberry Financial Group

Jay Gadberry, CIMA

<https://gadberryfg.com>

425 Capitol Avenue, Suite 3500

Little Rock, Arkansas 72201

(501) 975-7100

3. Garrison Financial

Kerry Bradley, CFA, MBA
<http://garrisonfinancial.com>
605 W Dickson St., Suite 201
Fayetteville, AR 72701
(479) 587-1045

4. Legacy Capital Group

Matt Jones, JD, CFP
<https://lccgar.com>
8315 Cantrell Road, Suite 200
Little Rock, AR 72227
(501) 376-7878

5. Millennium Capital Advisors

Pat Miller – President
<https://www.mca-ar.com>
425 Capitol Avenue, Suite 3010
Little Rock, AR 72201
(501) 975-0256

California Family Offices

1. Ascent Private Capital Management

John Zimmerman - President
<https://ascent.usbank.com>
Ohio, California, Colorado, Minnesota
CA Offices: Kelly Thomson
(858) 334-0844
kelly.thomson1@ascent.usbank.com

2. Aspiriant

John Allen, CFA, CAIA
<https://aspiriant.com>
Multiple locations across the country: California, New York, Massachusetts, Texas
50 California St., Suite 2600
San Francisco, CA 94111
(415) 371-7800

3. Blossom Wealth Management

<https://www.blossomwm.com>
George Salter, JD, MBA, CFP / CEO
PO Box 125
Alamo, CA 94507
(925) 833-9999

4. Camden Capital
James Krambeer – Founder / Partner
<https://www.camdencapital.com>
California & Florida locations
2301 Rosecrans Avenue, Suite 2110
El Segundo, CA 90245
(310) 725-0210
5. Cornerstone Family Office
Denise Barrett, CEO / President
<http://www.cwafamilyoffice.com>
1808 Aston Avenue, No 150
Carlsbad, CA 92008
(760) 476-2772
6. DRA Family Office
Jon Taber
<https://drafamilyoffice.com>
San Francisco, CA
(415) 324-6167
7. GenSpring
David Herritt, JD / Head of Family Office Services
<https://www.suntrust.com/genspring/family-office-services>
8. Horowitz Group
David Horowitz / Chairman
<https://www.horowitzgroup.com>
5030 Campus Drive, Suite A
Newport Beach. CA 92660
(949) 831-5158
9. Iconiq Capital
394 Pacific Avenue, 2nd Floor
San Francisco, CA 94111
(415) 967-7763
Information@iconiqcapital.com
10. Jeffer Mangels Butler & Mitchell
Timothy Lappen – Primary Contact
<https://www.jmbm.com/family-office.html>
2 Embarcadero Center
5th Floor
San Francisco, CA 94111
(415) 398-8080

11. Keiretsu Capital
Nathan MacDonald
<https://www.keiretsucapital.com>
12. Lakeside Virtual Family Office
Richard Gayton
<https://www.writerpatkramer.com/wp-content/uploads/2015/09/Rick-Gayton.pdf>
4450 Lakeside Drive
Toluca Lake, CA 91505
rgayton@lakesidevfo.com
(310) 740-1560
13. Makena Capital
Nic Amaroli
<https://www.makenacap.com>
2755 Sand Hill Road, Ste 200
Menlo Park, CA 94025
(650) 926-0510
14. Manchester Capital
Drew Beresford – Partner / Ted Cronin – Founder
<https://mcmlc.com>
California, New York, Virginia
1157 Coast Village Rd. Suite A
Montecito, CA 93108
(805) 969-5670
15. Meyers Family Enterprises
Stephen Hohenrieder
<https://www.mfenterprises.com>
Contact through Meyer Family Cellars
19750 Highway 128,
PO Box 294
Yorkville, CA 95494
(707) 895-2341
16. Nolan Capital
Peter Nolan
<http://www.nolancap.com>
58 11th Street
Hermosa Beach, CA 90254
(424) 675-7605
17. One Capital Management
Samantha Bakke / Brad Barrett
<https://onecapital.com>

520 Newport Center Dr., #430
Newport Beach, CA 92660
(805) 409-8150

18. Pathstone Federal

Multiple locations: California, Alaska, Arizona, Florida, Texas and more
1900 Avenue of the Stars
Suite 970
Los Angeles, CA 90067
(310) 734-5320

19. Peninsula Family Office

www.peninsulafamilyoffice.com
300 Arden Road
Menlo Park, CA 94025

20. Premier Family Office

<http://premierfo.com>
2525 Main Street, Suite 210
Santa Monica, CA 90405
info@premierfo.com

21. Presidium Wealth Partners / Summit Global

Steve Farrell
2400 Camino Ramon, Suite 178
San Ramon, CA
(925) 790-0400

22. Sieler, LLP

Corrine Brooks, CPA / Partner
<https://seiler.com/expertise/family-office>
220 Montgomery Street Suite 300
San Francisco, CA 94104
(415) 392-2123

23. Tarbox Family Office

Mike Nozzarella, CFP / Partner
<https://tarbox.com>
California and Arizona
500 Newport Center Dr., Suite 500
Newport Beach, CA 92660
(949) 721-2330

24. Caprock Group

Gregory Brown / William Gilbert, Jr
<https://caprock.com>
450 Newport Center Drive, Suite 280

Newport Beach, CA 92660
(949) 891-0039

25. True Capital Management

Doug Raetz / Ken Sorosky

<https://truecapitalmgmt.com/family-office>

101 Montgomery Street

Suite 2800

San Francisco, CA 94104

(415) 538-3600

26. Vulcan Capital

Chris Orndorff

<https://capital.vulcan.com>

California / Washington / Singapore

435 Tasso St., Suite 210

Palo Alto, CA 94301

(650) 329-5920

27. Whittier Trust

Thomas Frank, Jr.

<https://www.whittiertrust.com/family-office>

505 Montgomery St.

San Francisco, CA 94111

(415) 283-1850

Colorado Family Offices

1. BSW Wealth Partners

Elias Bachman – CIO

<https://bsw.com/>

2300 Broadway

Boulder, Colorado 80304

(303) 444-9696

2. Chasefield Capital

Harold Pine / Jordan Pine

<https://www.chasefieldcapital.com>

3900 S Wadsworth Blvd, Ste 480

Lakewood, CO 80235

(303) 854-8425

3. Cherry Creek Family Office

Corey McKiernan – CIO

<https://www.ccfo.com>

210 University Blvd., Suite 650

Denver, CO 80206

(303) 862-9550

4. Cedrus, Inc

John Scott / TJ Graeve

<https://www.cedrusfinancial.com>

8241 S. Continental Divide Rd.

Littleton , CO 80127

(720) 724-2170

5. Creestone Capital

Abby Barlow, CFA

<https://www.crestonecapital.com>

Colorado / Texas / California

1048 Pearl St, Suite #450

Boulder, CO 80302

(303) 442-4447

6. IWP Wealth

Charlie Willhoit / President

<https://iwpfo.com>

2719 East Third Avenue

Denver, CO 80206

(720) 328-9799

7. JFG Wealth Management

Brandon Johnson, CFA

<https://jfgwealth.net>

1144 15th Street, Suite 3950

Denver, Colorado 80202

(720) 475-1195

8. Vigeo Investments

Steven Folse / Skye Callantine

<https://www.vigeoinvest.com>

1530 16th St #500

Denver, CO 80202

(720) 974-2075

Connecticut Family Offices

1. Castlekeep

Charlie Haberstroh / Steve Haberstroh

<https://castlekeepadvisors.com>

257 Riverside Avenue, 2nd Floor

Westport, CT USA 06880

(203) 682-7200

2. Clapboard Hill Family Office

Thomas Pacilio – Sr. Managing Partner

<https://clapboardhill.com>

1265 Post Road East
Westport, CT 06880
(203) 429-0406

3. Cook Pine Capital

Eiichiro Kuwana / Michael Stevenson – CIO
<https://www.cookpinecapital.com>
2 Sound View Drive, 2nd Fl.
Greenwich, CT 06830
(203) 861-2930

4. Everwatch Financial

Matt Womble / Ted Kokas – CIO
<https://www.everwatch.com>
Connecticut / Florida / Rhode Island
321 South Main Street, Suite 550
Providence, RI 02903
(401) 421-9900

5. Family Office Association

Angelo Robles
<https://familyofficeassociation.com>
500 West Putnam Avenue
Suite 400, Greenwich CT 06830
(203) 570-2898

6. Genspring Family Office

David Herritt, JD / Head of Family Office Services
<https://www.suntrust.com/genspring/family-office-services>

7. Jones Family Office

Paul Tudor Jones
1 American Ln
Greenwich, CT 06831
(203) 302-7400

8. Kidd and Company

William J Kidd
<https://www.kiddcompany.com>
1455 East Putnam
Old Greenwich, CT 06870
(203) 661-0700

9. Winchester Capital

Cesar Anguillare / Richard Tavelli
<https://winchestercapital.com>

445 Orange Street
New Haven, CT 06511
(203) 787-5029

Delaware Family Offices

1. Lau Associates

Judy Lau
<https://www.bmt.com>
20 Montchanin Rd #110
Greenville, DE 19807
(302) 792-5955

2. Wilmington Trust

Donald DiCarlo
<https://www3.wilmingtontrust.com>
Offices throughout the United States
1100 North Market Street, Suite 1300
Wilmington, DE 19801
(302) 651-1000

Florida Family Offices

1. Amglobal Family Investment Office

Keith Bloomfield – CEO
<https://www.forbesfamilytrust.com>
230 Royal Palm Way, Suite 200
Palm Beach, FL 33480
(561) 249-6826

2. Barclay Breland

Chris Kelly – CEO
<https://www.barclaybreland.com>
500 University Blvd., Suite 205
Jupiter, FL 33458
(561) 275-2842

3. DKE Wealth

Michael Hartley, CFP
<http://www.dkefamilyoffice.com>
100 W Venice Avenue, Suite G
Venice, FL 34285
(941) 485-8220

4. Fautores Family Office

Michael Chindamo – CFP, AIF, CSP
<https://www.fautores.com>
PO Box 2817

Ormond Beach, FL 32176
(407) 492-5016

5. Fifth Avenue

Gary Price
<https://www.fifthavenuefamily.com>
3003 Tamiani Trail N, 410
Naples, FL 34103
(239) 262-6300

6. Fortune Partners Group / Aliya

Ross Kestin
<https://aliyacapitalpartners.com>
1450 Brickell Avenue, Suite 2600
Miami, FL 33131
(305) 831-4999

7. Genspring Family Office

David Herritt, JD / Head of Family Office Services
<https://www.suntrust.com/genspring/family-office-services>

8. GFG Capital

Mauricio Gruener
<https://gfgcapital.com>
701 Brickell Avenue, Suite 1400
Miami, FL 33131
(305) 810-6500

9. Hutchinson Family Office

Steve Hutchinson / Todd Walker
<https://hutchinsonfamilyoffice.com>
777 South Flagler Drive - West Tower, Suite 800
West Palm Beach, FL
(561) 983-4719

10. Legacy Family Office

Tamara Surratt – CEO
<https://www.legacyfamilyoffice.com>
9990 Coconut Road, Suite 225
Bonita Springs, FL 34135
(239) 949- 1982

11. Live Oak Family Office

H. Thomas Platt
<http://lofolc.com>
4376 Roma Blvd.

Jacksonville, FL 32210
(904) 631-6418

12. Omnia Family Wealth

Steven Wagner / Michael Wagner
<https://omniawealth.com>
18851 NE 29th Avenue, Suite 400
Aventura, Florida 33180
(305) 602- 9080

13. Providence Family Office

202 S Rome Ave # 150
Tampa, FL 33606
(813) 983-7860

14. Riverglades Family Office

Paul Marinelli, CFA, CPWA
<https://rivergladesfo.com>
2640 Golden Gate Pkwy, Suite 105
Naples, FL 34105
(239) 263-4079

15. Socius Family Office

Robert Konrad / Mark Baniewicz, CFP
<https://www.socius.com>
Florida / Pennsylvania
200 East Las Olas Boulevard, Suite 1550
Fort Lauderdale, FL 33301

16. The Miami Family Office

Tyler McNicholas
<https://themiamifamilyoffice.com>
328 Crandon Blvd. Suite #223
Key Biscayne, Florida 33149
(305) 333-1155

17. WE Family Office

Mel Lagomasino / Michael Zeuner
<https://www.wefamilyoffices.com>
Florida / New York
701 Brickell Ave, Suite 2100
Miami, FL 33131
(305) 825-2225

Georgia Family Offices

1. Crescent Wealth

Tim Wyrobek / Jeff taylor

<https://www.crescentwealthadvisory.com>

3630 Peachtree Road, Suite 750

Atlanta, GA 30326

(800) 520-7106

2. Gleneagles Group

David Plyler / Stephen Riddell

<https://gleneaglesgroup.com>

3715 Northside Parkway

Northcreek 200, Suite 600

Atlanta, GA 30327

(678) 904-0594

3. Homrich Berg Family Office

Emily Bentley / Stephanie Lang, CFA

www.homrichberg.com

3550 Lenox Rd NE, Ste 2700

Atlanta, GA 30326

(404) 264-1400

4. Infinity Capital

Jeffrey Vale / Phillip Jarrell

<https://infinityfunds.com>

3475 Piedmont Rd. NE, Ste 1525

Atlanta, GA 30305

(404) 458-4448

5. Letson Investment

James Letson

<https://www.letsoninvest.com>

8 West Brookhaven Drive

Atlanta, GA 30319-1102

(404) 237-7794

6. Nicholas Hoffman

Nicholas Hoffman / A. Carl Gambrell

<https://www.nhoffmanandco.com>

1355 Peachtree Street, NW, Ste 1450

Atlanta, GA 30309

(404) 815-5050

7. Pathstone

www.pathstone.com

3333 Piedmont Rd NE

Suite 2000

Atlanta, GA 30305
(404) 592-0180

8. PeachCap

Eric Burnette / David Miller
www.peachcap.com
550 Pharr Road NE, Ste 700
Atlanta, GA 30305
(404) 220-8958

9. Premis Advisors

www.premisadvisors.com
3344 Peachtree Rd. NE, Suite 800
Atlanta, GA 30326
(678) 666-5380

10. Ronald Blue Trust

Nick Stonestreet – CEO / Brian McLard -CIO
www.ronblue.com
1125 Sanctuary Parkway, Suite 500
Alpharetta, GA 30009
(770) 280-6000

11. Smith and Howard

Mark Abrams – CFA, CPA
<https://www.smith-howard.com>
271 17th Street, NW, Ste 1600
Atlanta, GA 30363
(404) 874-6244

12. Arthur K Blank Foundation / Home Depot Founder

Josh Kimball / Arthur Blank
<https://blankfoundation.org>
3223 Howell Mill Rd, NW
Atlanta, GA 30327
(470) 341-2100

13. Tidewater Wealth

William Chisolm
www.tidewaterllc.com
10 Commodore Court
Savannah, Georgia 31410
(912) 441-0601

14. Warren Averett

Jennifer Williams ,CPA
<https://warrenaverett.com>
Georgia, Florida, Alabama, Texas

6 Concourse Pkwy, #600, Concourse Corporate Center 6,
Atlanta, Georgia 30328
(770) 396-1100

Hawaii Family Offices

1. Laulima Families

<https://www.laulimafamilies.com>

1003 Bishop Street, Ste. 1200

Honolulu, HI 96813

(808) 394-8120

2. Lugen Family Office

Enzo Calamo

<https://lugenfamilyoffice.com>

Hawaii / British Columbia

355 Burrard Street, Ste. 1000

Vancouver, BC V6C 2G8

(866) 605-8885 Ext. 2

Idaho Family Offices

1. Buffington Mohr McNeal

Dean Buffington / Bruce Mohr

<https://www.bmmria.com>

802 West Bannock Street, Ste. 100

Boise, ID 83701

(208) 338-5551

2. Gryphon Wealth

Kirk Walton, JD / Philip Oleson

<https://gryphonprivatewealth.com>

(208) 938-5557

3. Caprock Group

Greg Brown / Mark Gustafson, CFA

<https://caprock.com>

California / Washington / Idaho

800 West Main Street, Suite 1150

Boise, ID 83702

(208) 368-9600

Illinois Family Offices

1. Advisory Partners

<https://apfamilyoffice.com>

980 N Michigan Avenue

Chicago, IL 60611

(312) 586-1400

2. Armory Capital
Jacob Ambrose / Rusty Freeland
<https://www.armorycap.com>
100 West University Ave., Suite 401
Champaign, IL 61820
(217) 378-4205
3. Hull Investments
Blair Hull
www.hullinvest.com
141 W. Jackson Blvd, Suite 1650
Chicago, IL 60604
(312) 356-4450
4. Liberta Family Office
<http://libertafamilyoffice.com>
1074 West Taylor Street #327
Chicago, IL 60607
(319) 914-0942
5. Najarian Family Office
Thomas Haugh – CIO
<https://www.najarianfamilyoffice.com>
411 S Wells Street, Suite 900
Chicago, IL 60607
(312) 878-3147
6. Neal Gerber Eisenberg
<https://www.nge.com>
2 N. LaSalle Street, Suite 1700
Chicago, IL 60602
(312) 269-8000
7. Oak Family Advisors
Francis Tuite, CFA - CIO
<https://www.ofallc.com>
50 North Wacker Drive, Suite 1760
Chicago, IL 60606
(312) 373-7221
8. Promus
Andy Code / Zach Musso – CFA
<https://promusholdings.com>
156 N. Jefferson Street, Suite 300

Chicago, IL 60661
(312) 784-3990

9. Schwartz Capital

Ted Schwartz
<https://www.schwartzcap.com>
1 N Wacker
Chicago, IL 60606
info@schwartzcap.com

10. Whitnell / Rockefeller Family Office

Mia Erickson / Wayne Janus
Multiple Locations
227 West Monroe Street, Suite 2050
Chicago, IL 60606
(630) 575-2300

11. Windrock Wealth

Brett Rentmeester – CFA, CAIA
<https://windrockwealth.com>
225 West Jefferson Ave, Suite 2
Naperville, IL 60540
(312) 650-9602

Indiana Family Offices

1. Family Legacy Family Office

Chuck Morgan / Julie Schipp
PO Box 56061
Indianapolis, IN 46256
(317) 844-8699

2. Indie Asset Partners

Grady Gaynor / Jay Brammer
<https://indieasset.com>
10585 N. Meridian Street, Suite 210
Carmel, IN 46290
(317) 428-6600

3. Lacy Diversified

J.A. Lacy / Bill Himebrook
<https://lacydiversified.com>
54 Monument Circle, Ste. 600
Indianapolis, IN 46204
(317) 237-5400

4. Oxford Financial Group

Kristina Baron, MBA / Robert “Bo” Ramsey III, JD, MBA, CFA, CAIA

<https://ofgltd.com>

11711 North Meridian Street, Suite 600
Carmel, Indiana 46032
(317) 843-5679

5. Patoka Capital

Chance Ragains / Don Von Behren
<http://www.patokacapital.com>
825 Northgate Blvd., Ste. 203
New Albany, IN 47150
(812) 945-4006

6. Simons Bitzer

Greg Simons
<https://simonsbitzer.com>
8350 S. Emerson Ave., Suite 100
Indianapolis, Indiana 46237
(317) 782-3070

7. Spectrum Wealth

Bob Phillips, CFP, CFA, CPA / Greg Thompson _CIO
<https://www.spectrum-mgmt.com>
600 East 96th Street Suite 130
Indianapolis, IN 46240
(317) 663-5600

8. Fi3 Family Office

Ivan Hoffman, CFP / Matt Simpson, CFP, CPA
<https://www.fi3advisors.com>
10401 N. Meridian Street, Suite 205
Carmel, IN 46290
(317) 426-8800

9. Wealth Strategies

Will Isaacs, CFP
<http://www.wealthstrategiesinc.com>
207 North High Street
Muncie, IN 47305
(765) 289-3366

Iowa Family Offices

1. Generations Wealth Management

Julie Fuller, CFP
<https://www.genwm.com>
500 Market Street, Ste. 100
West Des Moines, IA 50266
(515) 444-8367

2. HJN Advisors

Matt Juffer, CPA, JD, CFP

<https://hjnadvisors.com>

666 Grand Avenue, Suite 2400

Des Moines, IA 50309

(515) 245-3840

3. Legacy Bridge

Mike Zuendel / Tim Kadlec – CIO

<https://legacybridgepfo.com>

4601 Westown Parkway, Suite 220

West Des Moines, IA 50266

(515) 421-4870

4. SilverStone Group | HUB

<https://www.hubinternational.com>

212 Brady Street, Suite 4B

Davenport, IA 52801

(563) 324-1981

5. Valiant Wealth

David Vander Weide

<https://valiantwealth.com>

3408 Woodland Ave., #204

West Des Moines, IA 50266

(515) 223-6068

Kansas Family Offices

1. Ferrell Capital

Remco Overtop – CFA / CIO

<http://ferrellcapinc.com>

10601 Mission Road, Suite 350

Leawood, KS 66206

(913) 601-3200

2. Midwest Trust

Nick Bracco / Paul Heffley

<https://www.midwesttrust.com>

Multiple Locations

5901 College Boulevard, Suite 100

Overland Park, KS 66211

(913) 319-0300

3. Sunrise Advisor / Creative

<https://creativeplanning.com>

5454 W 110th St.

Overland Park, KS 66211
(866) 273-2848

Kentucky Family Offices

1. Atlas Brown

M. Scott Robinson
<https://www.atlasbrown.com>
333 East Main St, Ste 400
Louisville, KY 40202
(502) 271-2900

2. Jones, Nale & Mattingly

Travis Frick / Jonathan Eade
<https://www.jnmcpa.com>
401 West Main Street, Suite 1100
Louisville, KY 40202
(502) 583-0248

Louisiana Family Offices

1. Argent Financial Group

John McCollum, CFA – CIO
<https://argentfinancial.com>
500 E. Reynolds
Ruston, Louisiana 71270
(318) 251-5800

2. Callais Capital Management

Harold Callais II
<https://callaiscapital.com>
401 Focus Street
Thibodeaux, Louisiana 70301
(985) 492-2323

Maine Family Offices

1. Atlantic / Clearstead Trust

John Higgins / John Cottrell
<https://clearsteadtrust.com>
111 Commercial Street, Ste 302
Portland, Maine 04101
(207) 775-7200

2. Black Point

John Greene
<https://www.blackpointcorporation.com>

1 Ram Island Farm
Cape Elizabeth, Maine 04107
(207) 799-0011

3. Starboard Advisors

Barton Weisenfluh / Rita Newland
<https://www.starboardadvisorsllc.com>
2 Union Street, Suite 401
Portland, Maine
(207) 358-1200

Maryland Family Offices

1. Ansaco Family Office

Jeff Ansary
3 Bethesda Metro Center, Ste. 700
Bethesda, MD 20814

2. Batoff Associates

Justin Batoff
<https://batoffassociates.com>
36 St. Charles Street, 15th Floor
Baltimore, MD 21201
(410) 864-1554

3. Eaglestone Wealth

James Warring / Joe Kantakevich
<https://estwa.com>
1101 Wootton Parkway, Suite 400
Rockville, Maryland 20852
(301) 924-2160

4. Maryland Capital Advisors

Mike Damas / Paul Cucchissi
<http://www.marylandcap.com>
7 Chester Plaza
Chester, MD 21619
(410) 604-2741

5. Verdenca Capital

Michael Harris / Leo Kelly – CEO
<https://verdenca.com>
217 International Circle, Suite 200
Hunt Valley, MD 21030
(410) 472-5380

Massachusetts Family Offices

1. Antaeus Wealth

Allison Conlon
<https://antaeuswealth.com>
80 Central Street, Ste 150
Boxborough, MA 01719
(978) 264-9999

2. Ballentine Partners

Roy Ballentine, CFP, ChFC / Drew McMorrow
<https://ballentinepartners.com>
230 3rd Avenue, 6th Floor
Waltham, MA 02451
(781) 314-1300

3. Banyan Global

Josh Baron
<https://banyan.global/about-banyan>
60 State St., Suite 2230
Boston, MA 02109
(617) 500-6701

4. Blue Haven Initiative

Liesel Pritzker Simmons / Ian Simmons
<http://www.bluehaveninitiative.com>

5. BlumShapiro / CLA

Jen Leary
<https://www.claconnect.com>
Two International Place, 22nd Floor
Boston, MA 02110
(781) 982-1001

6. Boston Family Office

George Beal / Dylan Brix, CFA
<http://bosfam.com>
88 Broad Street
Boston, MA 02110
(617) 624-0800

7. Daintree Advisors

Daniel Beatty, CFP / Sam Afari-Aikins
<https://daintreeadvisors.com>
100 High St Ste 1110
Boston, MA 02110
(617) 674-2400

8. JDJ Family Office

James Kittler

<https://www.jdfos.com>

2 Oliver Street, Ste 905
Boston, MA 02109
(617) 765-2100

9. McCullen Capital

Joseph McCullen, Jr

<https://www.mccullencapital.com>

One Liberty Square
Boston, MA
(617) 423-2300

10. Osbon Capital

John Osbon / Max Osbon

<https://osboncapital.com>

75 State Street, Ste. 100
Boston, MA 02109
(617) 217-2772

11. Paul McCoy Family Offices

<https://www.paul-mccoy.com>

31 St James Avenue, Suite 740
Boston, MA 02116
(617) 933-3600

12. Streamline Family Office

Katie Sullivan / Amy Johnston

<https://www.streamlinefamilyoffice.com>

PO Box 823
Dover, MA 02030
(508) 785-2399

13. Trillium Asset Management

John Quealy, CPA / Matt Patsky, CFA

<https://www.trilliuminvest.com>

60 South Street, Ste 1100
Boston, MA 02111
(617) 423-6655

14. Twin Focus

Savannah Campbell

<https://twinfoocus.com>

77 Park Plaza
Boston, MA 02116
(617) 720-4500

Michigan Family Offices

1. 42 North Partners
Mike Jadernoa
<https://42np.com>
171 Monroe Avenue Suite 410
Grand Rapids, MI 49503
(616) 325-2100
2. FEFO (Foundations Endowments Family Office)
Patrick Gaughan – Brooks Capital
<http://fefogr.org/steering-committee>
3. Grey Dunes
William Boer
<http://www.greydunes.com/our-staff>
40 Pearl Street NW, Suite 1000
Grand Rapids, MI 49503
(616) 454-9380
4. Hantz Group
Mike Score
<https://www.hantzgroup.com>
26200 American Drive
Southfield, MI 48034
(248) 304-2855
5. MFO Management
Joseph Covino – CFA / CIO
<https://mfo.com>
255 E Brown Street, Ste 210
Birmingham, MI 48009
(248) 723-0050
6. Navigant Oak
Greg Boll
<https://navoak.com>
107 N Center Street
Northville, MI 48168
(248) 308-3571
7. Northern Trust
<https://www.northerntrust.com>
10 West Long Lake Road
Bloomfield Hills, MI 48304
(248) 593-9300

8. Pennell CPA / Advisory

Fred Pennell / Patrick Patton

<https://pennellcpa.com>

5005 Cascade Road, SE, Suite A

Grand Rapids, MI 49546

(616) 285-7050

9. Pinnacle Wealth

Daniel Cesta

<https://pwmgi.com>

849 Penniman Avenue, #201

Plymouth, MI 48170

(734) 667-5581

10. R.H. Bluestein

Robert Bluestein

<https://www.rhbco.com>

260 East Brown Street, Suite 100

Birmingham, MI 48009

(248) 646-4000

11. Rehman Financial

<https://www.rehmann.com>

1500 West Big Beaver Rd.

Troy, MI 48084

(866) 799-9580

12. Vineyard Capital

Richard Helppie

<http://www.vineyardcap.com>

26111 West 14 Mile Road

Franklin, MI 48025

info@vineyardcap.com

Minnesota Family Offices

1. Cherry Tree Wealth

Keith Tufte / Justin Fry

<https://cherrytreewealth.com>

301 Carlson Parkway, Suite 103

Minnetonka, MN 55305

(952) 253-6024

2. Discipline Advisors

Joseph Michaletz

<https://www.disciplineadvisors.com>

150 Saint Andrews Court, Suite 210
Mankato, MN 56001
(507) 625-5876

3. Hunter Trust

Andrew Hunter III
<http://www.huntertrust.com/>
info@huntertrust.com

4. JNBA Advisors

Kim Brown / John Foster
<https://jnba.com>
8500 Normandale Lake Boulevard, Suite 450
Minneapolis, MN 55437
(952) 844-0995

5. Lake Harriet Capital

James Lawrence
<https://lakeharrietcapital.com/>
222 South 9th Street
Minneapolis, MN, 55402
(612) 913-4949

6. Meristem Wealth

James Robbins, CIMA / Patrick Regan – CIO
<https://www.meristemfw.com>
701 Carlson Parkway, Suite 1400
Minnetonka, MN 55305
(952) 835-2577

7. Okabena

Darcy Catlett
<http://www.okabena.com>
1800 IDS Center
80 South Eighth Street
Minneapolis, MN 55402-4523
(612) 339-7151

8. Sawmill Private Management

John Hinck / Rufus Winton – CIO
<https://www.sawmilltrust.com>
730 Second Avenue South, Suite 1400
Minneapolis, MN 55402
(612) 752-1770

9. Vista / MBKS

Michael Bills / Kelene Skyrpek

<http://www.mbksfamilyoffice.com>

860 Blue Gentian Rd., Ste. 150
Eagan, MN 55121
(612) 503-8600

10. Walrus Partners, LLC

<https://www.walruspartners.com>

401 N 2nd Ave #405
Minneapolis, MN 55401
(612) 353-5998

11. Waypoint Capital

David Baratta / Mark Pletts

<https://www.waypointcapitaladvisors.com>

600 South Highway 169, Suite 1945
Minneapolis, MN 55426
(858) 755-2021

12. White Oak

Laura Bereiter, CPA. CFP

<https://www.whiteoakswealth.com>

80 South 8th Street, Ste. 1725
Minneapolis, MN 55402
(612) 455-6901

Mississippi Family Offices

1. Addicus

Michael Berry / Andrew Adams

<https://weareaddicus.com>

2694 West Oxford Loop, Ste 150
Oxford, MS 38655
(662) 371- 4124

2. Argent Financial

John McCollum, CFA

<https://argentfinancial.com>

613 South Lamar
Oxford, MS 38655
(662) 550-4443

Missouri Family Offices

1. Burds & Kintz

<http://bk-pc.com>

2200 West Port Plaza Dr., Ste 203
St. Louis, MO 63146
(314) 317-8900

2. Commerce Trust

<https://www.commercetrustcompany.com>

901 E Broadway, 2nd Floor

Columbia, MO 65201

(573) 886-5275

3. Matter Family Office

Ryan Blackburn

<https://www.matterfamilyoffice.com>

7711 Bonhomme Avenue, Suite 400

St. Louis, MO 63105

(314) 862-5190

4. Midwest Trust

Andrew Browne / Richard Blume II

<https://www.midwesttrustmo.com>

4520 Main Street, Suite 175

Kansas City, MO 64111

(816) 329-1593

5. Mosaic Family Wealth

Scott Highmark / Larry Shikles

<https://mosaicwealth.com>

1401 South Brentwood Boulevard, Suite 630

St. Louis, MO 63144

(314) 627.5220

6. Rush Penn

7800 Bonhomme Avenue

St. Louis, MO 63105

(314) 548- 9045

7. St. Louis Trust

Kris Anderson, CFA

<https://www.stlouistrust.com>

7701 Forsyth Blvd., Ste. 1100

St. Louis, MO 63105

(314) 727-4600

Montana Family Offices

1. Deffinbaugh Financial

David Deffinbaugh, CPA

<https://www.dfsfinancialservices.com>

1219 13th Street South

Great Falls, MT 59405

(406) 454-8888

2. Loveless Family Office

Donald Loveless, CFA
<https://www.loveless-wealth.com>
2615 St. Johns Ave, Suite A
Billings, MT 59102
(406) 656-9212

3. White Wealth / Hightower

Thomas White
113 E Oak Street, #4A
Bozeman, MT 59715
(406) 404-4047

Nebraska Family Offices

1. Panorama Point

Steven George
<https://www.panoramapoint.com>
13030 Pierce Street, Ste. 300
Omaha, NE 68144
(402) 933-1280

2. Silverstone | HUB

<https://www.hubinternational.com/offices/us/nebraska>
11516 Miracle Hills Drive, Suite 100
Omaha, NE 68154
(402) 964-5400

3. Treetop Ventures

Bill Fisher / Tom Boje
<https://www.treetopventures.com>
13520 California, Suite 200
Omaha, NE 68154
(402) 905-9900

Nevada Family Offices

1. Elysian Private Wealth

John Jemison
<http://www.elysien.com>
8905 W. Post Road, Ste. 200
Las Vegas, NV 89147
(702) 799-9350

2. IWC Wealth | Integrated

<https://www.integratedwealth.com>
59 Damonte Ranch Parkway, Suite B 379
Reno, NV 89521
866-898-1860

3. Kingsbridge

David Dunn

<https://kingsbridgealts.com>

1140 N Town Center Drive, Suite 340

Las Vegas, NV 89144

(702) 947-5160

4. Sentinel Rock

David Thorson

<https://www.sentinelrockwm.com>

9130 W Russell Rd

Las Vegas, NV 89148

(702) 851-0222

5. Whittier Trust of Vegas

100 W Liberty Street, Ste 890

Reno, NV 89501

(775) 686-5400

New Hampshire Family Offices

1. Ballentine Partners

Debra Whitney, CFP

<https://ballentinepartners.com>

PO Box 1860

Wolfeboro, NH 03894

(603) 569-1717

2. Charter Trust

Jason Edgar / Maureen Kimball

<https://www.chartertrust.com>

90 North Main Street

Concord, NH 03301

(603) 224-1350

3. Harvest Capital | Colony Group

Ron Rubin

<https://www.thecolonygroup.com>

11 South Main Street, Suite 501

Concord, NH 03301

(603) 224-6994

4. Hemenway Trust

Michael Puzzo

<https://www.hemtrust.com>

25 Pelham Road, Suite 402

Salem, NH 03079

(603) 913-8022

5. J. Bradford | Cottage Street
Jason Haviland, CFA
<https://cottagestreetadvisors.com>

6. Perspecta Trust
1 Liberty Lane E
Hampton, NH 03842
(603) 929-2700

New Jersey Family Offices

1. Biltmore Capital
Donald Chambers
<https://biltmorecap.com>
33 Witherspoon Street, Ste. 210
Princeton, NJ 08542
(561) 567-8978

2. Brave Asset Management
Scott Morrison / Jamie Haire
<https://bravefamilyadvisors.com>
47 Summit Avenue, Suite A
Summit, NJ 07901
(908) 522-8822

3. Broadridge
Chris Perry | Mike Alexander
<https://www.broadridge.com>
2 Gateway Center
Newark, NJ 07102
(201) 714-3000

4. Copper Beach
John Parise
<https://copperbeechfg.com>
1223 N Church Street
Moorestown, NJ 08057
(856) 988-8300

5. Day Pitney
Bob Bolton
<https://www.daypitney.com>
One Jefferson Road
Parsippany, NJ 07054
(973) 966-6300

6. DeSimone Group
Michael DeSimone
<https://www.desimonegroup.com>
PO Box 2520
Cherry Hill, NJ 08003
(856) 761-0740
7. Dorfman Mizrach & Thaler
<http://www.dmtcpas.com>
555 Route 1 South
Iselin, NJ 08830
(732) 404-1868
8. FFO
Adina Herskowitz
<https://www.ffollc.com>
545 5th Avenue, Ste 1100
New York, NY 10017
(212) 202-3230
9. Healey Development
Thomas Healey, CFA
<http://www.healeydev.com>
310 South Street
Morristown, NJ 07960
(973) 656-1818
10. Lassus Wherley | Peapack
John Babcock | John Creamer
<https://www.peapackprivate.com>
500 Hills Drive, Suite 300
Bedminster NJ 07921
(908) 719-6430
11. Massey Quick Simon
<https://www.mqsadvisors.com>
360 Mt. Kemble Avenue
Morristown, NJ 07960
(973) 525-1000
12. Round Table Wealth
Robert Davis | Steve Giacona
<https://roundtablewealth.com>
241 North Avenue W, Suite 300
Westfield, NJ 07090
(908) 789-7310

13. Tradition Capital | Cary Street
Michael Ciccone
<https://carystreetpartners.com>
129 Summit Avenue
Summit, NJ 07901
(908) 598-0909

14. Untracht Early
David Untracht
<https://www.untracht.com>
325 Columbia Turnpike, Suite 202
Florham Park, NJ 07932
(973) 408-6700

15. Wilkin Guttenplan
Chris Frederick | Ed Guttenplan
<https://www.wgcpas.com>
1200 Tices Lane
East Brunswick, NJ 08816
(732) 846-3000

New Mexico Family Offices

1. Empire Trust
Eric Burton
<http://www.empiretrustinc.com>
320 Osuna Road NE, #G-1
Albuquerque, NM 87107
(505) 344-2244

2. Heritage Trust
Daniel Montoya
<https://www.htrust.com>
4801 Lang NE, Suite 110
Albuquerque, NM 87109
(505) 256-7700

3. Womack Wealth
<https://www.womackwealthmanagement.com>
6565 Americas Parkway
Albuquerque, NM 87110
(505) 888-9449

New York Family Offices

1. Atlas Family Office
<https://www.atlasfmo.com>
6 East 43rd Street

New York, NY 10017
(212) 257-1021

2. Ayco Financial

Larry Restieri | Robert Fritz
<https://www.ayco.com>
25 British American Blvd.
Latham, NY 12110
(866) 325-2215

3. BBR Partners

Brett Barth | Evan Roth
<https://www.bbrpartners.com>
55 East 52ND Street, 18th Flr
New York, NY 10055
(212) 313-9870

4. Bessemer Trust

<https://www.bessemertrust.com>
Multiple Offices
1271 Avenue of the Americas
New York, NY 10020
(212) 708-9100

5. BNY Mellon

<https://www.bnymellonwealth.com>
Multiple Locations
200 Park Ave
New York, NY 10166
(646) 791-3414

6. Central Family Advisors

Marcelo Mendoza | Gustavo Russo, CFA
<https://www.cenfam.com>
655 Third Avenue, Suite 2900
New York, NY 10017

7. Citi Private Bank

Multiple Locations

8. Clarfeld Private Wealth

Michael Brennan
<https://www.clarfeld.com>

437 Madison Ave, 18th Floor
New York, NY 10022
(212) 956-9494

9. Covepoint

Melissa Ko
<http://www.covecap.com>
142 West 57th Street, 5th Floor
New York, NY 10019
(212) 782-3600

10. EMM Wealth | Cerity Partners

David Aaron | Chris Arotin
<https://ceritypartners.com>
220 East 42nd Street, 32nd Floor
New York, NY 10017
(212) 476-5555

11. Family Management Corp

Seymour Zises | Andrea Tessler
<https://www.familymanage.com>
485 Madison Avenue, 19th Floor
New York, NY 10022-5862
(212) 872-9600

12. Family Office Advisors

Charles Comer
<https://familyofficeadvisorsllc.com>
370 Lexington Avenue, Ste 1400
New York, NY 10017
(212) 697-7800

13. FFO – (See earlier entry)

14. Fiduciary Trust | Franklin Templeton

David Lederer
<https://www.fiduciarytrust.com>
280 park Avenue
New York, NY 10017
(727) 299-4017

15. Friedman Kaplan

Gregg Lerner | Barry Adelman
<https://www.fklaw.com>
7 Times Square
New York, NY 10036-6516
(212) 833.1100

16. Geller and Company
Diane Gubelli | Martin Geller
<http://www.gellerfos.com>
909 3rd Avenue
New York, NY 10022
(212) 583-6000
17. JMC Family Office
Jolene Hernandez | Emily Kochanowicz
<https://www.jmcfamilyoffice.com>
55 Fifth Avenue, Suite 1807
New York, NY 10003
(646) 797-2700
18. JP Morgan Private Bank
Multiple Locations across the US
19. Lopresti Law Group
Marc Lopresti
<http://loprestilawgroup.com>
17 State Street, 19th Floor
New York, NY 10004
(212) 732-4029
20. Manchester Capital
Drew Beresford | Ted Cronin
<https://mcmlc.com>
410 Park Avenue, Suite 1610
New York, NY 10022
(212) 588-1120
21. Marcum Advisors
David Buzkin
<https://www.marcumllp.com>
Multiple Locations
730 3rd Avenue, 11th Floor
New York, NY 10017
(212) 485-5600
22. Pepper International
Carol Pepper – carol@pepperinternational.com
<https://www.pepperinternational.com>
23. Presti and Naegele
Andrew Presti
<https://www.pntax.com>

225 West 35th, 5th Floor
New York, NY 10001
(212) 736-0055

24. Privos Capital

<http://privoscapi.com>
(917) 688-2683

25. Rockefeller Capital

Gregory Fleming – CEO
<https://rcm.rockco.com>
45 Rockefeller Plaza, Floor 5
New York, NY 10111
(212) 549-5100

26. Sierra Capital

Carlos Pedroso
<https://www.sierracap.com>

27. Silvercrest Asset Management

Christopher Brown, CFA
<https://www.silvercrestgroup.com>
1300 Avenue of the Americas, 38th Floor
New York, NY 10019
(212) 649-0600

28. TAG Associates

Jonathan Bergman, CFP
<https://tagassoc.com>
810 Seventh Avenue, 7th Floor
New York, NY 10019
(212) 275-1500

29. Tannenbaum Helpert Syracuse and Hirschtitt

Wayne Davis
<https://www.thsh.com>
900 Third Avenue
New York, NY 10022
(212) 508-6700

30. The Abernathy Group

Steven Abernathy
<https://abernathygroupfamilyoffice.com>
530 5th Avenue, 24th Floor
New York, NY 10036
(212) 293- 3499

31. The New York Family Office
<https://www.tnyfo.com>
220 East 42nd Street, 29th Floor
New York, NY 10017
(646) 734-4056

32. Tiedemann Wealth
Michael Brady
<https://tiedemannadvisors.com>
520 Madison Avenue, 26th Floor
New York, NY 10022
(212) 396-5900

33. UBS Global
www.ubs.com
Multiple Locations

34. Witter Family Office
Dean Witter | Michael Witter
<https://witter.nyc>
135 East 57th Street
New York, New York 10022

North Carolina Family Offices

1. Altavista Wealth
Daniel Akers, CFP, CPA
<https://altavistawealth.com>
5960 Fairview Rd., Suite 400
Charlotte, NC 28210
(704) 365-4867

2. Biltmore Family Office
Chris Cecil. | Mike Farrell
<https://www.biltmorefamilyoffice.com>
500 East Boulevard
Charlotte, NC 28203
(704) 248-5230

3. Blair, Bohlé & Whitsett
John Blair | George Bohlé
<https://www.bbwpllc.com>
10815 Sikes Place, Suite 100
Charlotte, NC 28277
(704) 841-9800

4. Byron Financial
William Byron

<https://byronfin.com>

6100 Fairview Rd., Suite 1150
Charlotte, NC 28210
(704) 442-4402

5. Colony Financial

Thomas Byrd, CAIA

<https://colonyfamilyoffices.com>

4250 Congress Street, Suite 175
Charlotte, NC 28209
(704) 285-7300

6. Eton Financial

Robert Mallernee, CFA

<https://etonadvisors.com>

5915 Farrington Road, Suite 202
Chapel Hill, NC 27517
(919) 442.1550

7. Franklin Street

Bill Thompson | Robert Eubanks, Jr

<https://franklin-street.com>

1450 Raleigh Road, Suite 300
Chapel Hill, NC 27517
(877) 489-2600

8. GenSprings Family Office

Multiple Locations

<https://www.suntrust.com>

9. Hayden Harper

Mike Fox | Scott Cannady

<https://www.haydenharper.com>

828 East Blvd.
Charlotte, NC 28203
(704) 343-2447

10. Hutchinson Family Office

Steven Hutchinson

<https://hutchinsonfamilyoffice.com>

4208 Six Forks Road, Suite 1000
Raleigh, NC 27609
(919) 249-8977

11. Long Family Office

Randy Long

<https://www.longfamilyoffice.com>

5101 Dunlea Ct, Ste 204C
Wilmington, NC 28405
(910) 399-2748

12. McGeever

<https://mcgeeverllc.com>

Raleigh, NC
(800) 717-7344

13. Taft Family

Thomas Taft, Jr | Jonathan Taft

<https://www.taftfamilyventures.com>

631 Dickinson Ave.
Greenville, N.C. 27834
(252) 752-7101

14. Worth Advisors

Gregory Goodlett – CIO

<https://worthadvisors.com>

5605 77 Center Drive, Suite 101
Charlotte NC 28217
(704) 731-0121

Ohio Family Offices

1. Ancora Advisors

Dan Hyland | John Micklitsch, CFA – CIO

<https://ancora.net>

6060 Parkland Boulevard, Suite 200
Cleveland, Ohio 44124
(216) 825-4000

2. Bratenahl Capital

Michael Howley

<https://www.bratenaahlcapital.com/#our-leadership-team>

700 West St. Clair Avenue, Suite 414
Cleveland, OH 44113
(216) 820-4640

3. Capital Asset Management

C. Todd Fry, CIMA, CFS

<http://capitalassetmgmt.com>

445 Hutchinson Ave. Ste 270
Columbus, OH 43235
614-515-5510

4. CM Wealth Advisors

Douglas Smorag | Cynthia Resch – CIO
<https://www.cmwealthadvisors.com>
2000 Auburn Drive, Suite 400
Beachwood, OH 44122
216-831-9667

5. Cornerstone Family Office

Catherine Veres | Carrie Rosko
<https://cornerstonefamilyoffice.com>
5885 Landerbrook Drive, Suite 300
Mayfield Heights, OH 44124
(440) 460- 0460

6. Gries Financial

Rob Herman | Jeff Palmer
<https://gries.com>
1801 E 9th St. Suite 1600
Cleveland, OH 44114
(216) 861-1148

7. Hartland > Now Clearstead Advisors

Carl Tippit, CFA
<https://www.clearstead.com>
1100 Superior Avenue East, Suite 700
Cleveland, OH 44114
(216) 621-1090

8. Parlan Financial

Brian Hughes | Helyn Bolanis
6011 Renaissance Place
Toledo, OH 43623
(419) 885-1130

9. Sequoia Financial

Tom Haught
<https://www.sequoia-financial.com>
3500 Embassy Pkwy, Suite 100
Akron, OH 44333
(888) 225-3777

10. St. Clair Advisors

David Sommer, CIMA
<https://www.saintclairllc.com>
6120 Parkland Blvd., Suite 306
Mayfield Heights, OH 44124
(216) 925-5670

Oklahoma Family Offices

1. Covenant Family Offices

Barron Beal | John Eadie
<https://www.covenantmfo.com>
6305 Waterford Blvd., Suite 120
Oklahoma City, OK 73118
(405) 810-7730

2. GFO Companies (Gupta)

Rohan Gupta
<http://gfocompanies.com>
1111 N Lee Ave. Suite #215
Oklahoma City, OK 73103
(405) 455-9065

3. Rogers and Bell

Sharon Bell
<http://www.rogersandbell.com>
1605 E. 11th Street
Tulsa, OK 74120
(918) 582-5201

4. Square Deal Capital

Rob McLaughlin | Kelly Gray
<https://www.squaredealcapital.com>
6824 N Robinson Ave
Oklahoma City, OK 73116
(405) 256-4200

Oregon Family Offices

1. Capital Family Office

Mark Nortman
<http://capitolcfo.com>
1500 NW Bethany Blvd. Suite 280
Beaverton, OR 97006
(503) 897-0236

2. Geffen Mesher

Brian Annand | David Adams
<https://gmco.com>
888 SW 5th Avenue, Suite 800
Portland, OR 97204
(503) 221-0141

3. Meriwether Family Office

Mark Blake

<https://meriwethergroup.com>

2001 NW 19th Avenue, Suite 1038
Portland, OR 97209
(503)223-9062

4. Portland Private Wealth

Jason McMillen | Jacob Becker

<https://www.portlandprivatewm.com>

1834 SW 58th Avenue, Suite 101
Portland, OR 97221
(503) 405-9472

5. Ravensview Capital

Joe Eberhardt

<https://ravensviewcapital.com>

2995 NW Imperial Terrace
Portland, Oregon 97210
(503) 714-1393

6. VergePointe Wealth

Brad Parrott | Scott Roberts

<https://www.vergepointe.com>

5285 Meadows Road
Suite 161
Lake Oswego, OR 97035
(503) 684-0100

Pennsylvania Family Offices

1. Baldwin Family Office

Eric Meck | Vanessa Geiger

<https://www.baldwinmgt.com>

1001 Conshohocken State Rd, Suite 1-202
West Conshohocken, PA 19428
(610) 260-1555

2. Cornerstone

<http://www.cfollc.com>

40 Morris Avenue, Suite 301
Bryn Mawr, PA 19010

3. Febert and Associates

John Febert, CPA

<http://febertassociates.com>

305 McKnight Park Drive
Pittsburgh, PA 15237
(412) 258 – 2258

4. Fortis Family Office

Derek Boles | Jane Amodei
<https://fortisfamilyoffice.com>
1045 First Avenue, Suite 120
King of Prussia, PA 19406
(610) 313-0910

5. Handwerk Multi-Family Office

Derek Handwerk
<https://www.handwerkmfo.com>
2293 Locust Drive
Lansdale, PA 19446
(215) 238-0212

6. HWSC Family Office

James Bly, Jr – Founder
<https://www.hwsc.com>
2100 Georgetown Dr. Suite 302
Sewickley, PA 15143
(724) 933-6650

7. LGL Partners

Keith Bloomfield – CEO
<https://www.lglpartners.com>
100 Front Street
Conshohocken, PA 19428
(888) 545-4050

8. McGuireWoods

J. Tracy Walker IV | Alan Cason
<https://www.mcguirewoods.com>
260 Forbes Avenue, Suite 1800
Pittsburgh, PA 15222
(412) 667-6000

9. Pitcairn

H.F. “Rick” Pitcairn – CIO
<https://www.pitcairn.com>

165 Township Line Rd., Suite 3000
Jenkintown, PA 19046
(215) 887-6700

10. Socius Family Office

Robert Konrad | Mark Renz, CFA

<https://www.socius.com>

2605 Nicholson Road, Suite 5140
Sewickley, PA 15143
(724) 602-2912

12. PNC Private Wealth

<https://www.pnc.com>

285 Fort Couch Road
Pittsburgh (St. Clair), PA 15241
(888) 947-3762

13. Veritable LP

Fred Bacani | Jeffrey Beachell

<https://www.veritablelp.com>

6022 West Chester Pike
Newtown Square, PA 19073
(800) 345-9551

14. Waldron Wealth

John Waldron | Michael Krol, CFP, CPA

<https://www.waldronprivatewealth.com>

44 Abele Road, Suite 400
Bridgeville, PA 15017
(412) 221-1005

Rhode Island Family Offices

1. DiSanto Priest

Emilio Colapietro

<https://www.disantopriest.com>

117 Metro Center Blvd., Suite 3000
Warwick, RI 02886
(401) 921-2000

South Carolina Family Offices

1. Malloy Family Offices

<http://malloyandco.com>

Cheraw, SC
(858) 492.8050

2. Roadsted Capital

Jeff McDowell

<http://www.roadsteadcp.com>

1 Cool Blow Street, Suite 200
Charleston, SC 29403
(843) 789-4256

South Dakota Family Offices

1. Bridgeford Trust

Linda Voller, CTFA | Danielle Keaton
<https://www.bridgefordtrust.com>
330 South Poplar Ave, Suite 103
Pierre, SD 57501
(605) 224-9189

2. Sageworth Trust

Tim Brown
<https://sageworth.com>
300 S Phillips Avenue, Suite 204
Sioux Falls, SD 57104
(717) 735-8000

Tennessee Family Offices

1. Arlington Family Office

Ken Polk, CFP | Peter Barber
<https://arlingtonfamilyoffices.com>
515 Church Street
Franklin, TN 37064
(615) 601-3861

2. Dobbs Management

Ed Dobbs | John H Hobbs
<https://www.dobbsmanagement.com>
6070 Poplar Ave., Suite 750
Memphis, TN 38119
(901) 684-1082

3. Green Square Advisors

Steven Sansom
<https://www.greensquareinv.com>
6075 Poplar Avenue, Suite 221
Memphis, TN 38119
(901) 498-6300

4. Kings Point Capital

Jack Salzman
<https://www.kingspointcap.com>
112 Westwood Place, Suite 210
Brentwood, TN 37027
(800) 259-1331

5. SilverLeafe Capital

William Patterson, CIMA | John Russell, CFA
<https://silverleafe.com>

6070 Poplar Avenue, Suite 725
Memphis, Tennessee 38119
(901) 259-3345

6. SouthWorth Capital

Jeff Presley | Clay Presley
<http://southworthcapitalmanagement.com>
813 Ridge Lake Blvd.
Memphis, TN 38120
(901) 425-9200

Texas Family Offices

1. Cahtexis Family Holdings

<https://www.cathexis.com>
1000 Louisanna Street, Suite 7000
Houston, TX 77002
(713) 400-3334

2. Galapagos Partners

Stephen Lack | Wesley Kubesch
<https://www.gplp.com>
55 Waugh Drive, Suite 1130
Houston, TX 77007
713-803-4326

3. Hallwood

Gert Lessing
<https://hallwood.com>
10440 N Central Expressway, Suite 240
Dallas, TX 75231
(214) 528-5588

4. JF2 Capital Partners

Jon Frankel | Aaron Pierce
<https://www.jf2capital.com>
16000 N. Dallas Parkway #220
Dallas, TX 75248
214-295-5320

5. Jackson Walker, LP

Michael Baldwin | Keith Branyon
<https://www.jw.com>
Multiple Office Locations
2323 Ross Avenue, Suite 600
Dallas, TX 75201
(214) 953-6000

6. Meritage Capital | Brown Advisory
Michael Hankin | Jacob Hodes – CIO
<https://www.brownadvisory.com>
500 West 2nd Street, Suite 1850
Austin, TX 78701
(800) 645-3923
7. PattersonThoma
Don Patterson | Andy Harvey
<https://pattersonthoma.com>
3899 Maple Avenue, Suite 225
Dallas, TX 75219
(214) 978-3831
8. Penrose, LP
Ben Rosenthal | Steve Hudgins
<http://penrose-llc.com>
600 E Exchange Ave, Suite 200
Fort Worth, TX 76164
(817) 870-3117
9. Phlox Capital
Francisco Sanchez | Joe Martinez
<https://www.phloxcapital.com>
325 N. Saint Paul St., Suite 2240
Dallas, Texas 75201
(214) 238-5640
10. Q Family Office
Samuel Jeffries
<https://www.qinvestments.com>
301 Commerce Street, Suite 3200
Ft Worth, TX (817) 332-9500
11. Ramex
Simon Wachsberg – Director
<https://www.ramexinc.com>
5151 San Felipe, Suite 2325
Houston, TX 77056
(713) 977-5212
12. Rocky Point Ventures
Wally Loewenbaum | Reg Hargrove
<http://rockypointventures.com>
1000 Westbank Drive, Ste 2A
Austin, TX 78746
(512) 637-3552

13. Tanglewood Family Office
Andrea Olsen-Condon
<http://tanglewoodfamilyoffice.com>
245 West Ledge Stone Drive, Suite 200
Fredericksburg, TX 78624
(830) 997-2848

14. Tolleson Wealth
J Carter Tolleson | Richard Joyner
<https://www.tollesonwealth.com>
5500 Preston Road, Suite 250
Dallas, TX 75205
(214) 252-3250

15. Woods Family Office
<http://www.woodsfamilyoffice.com>
Houston, TX

Utah Family Offices

1. Andina Family Office
Lynette Hilgenberg | Penny Paul
<https://www.andinafamilyoffices.com>
2600 Executive Parkway, Suite 451
Lehi, UT 84043
(801) 653-0564

2. Bonneville Multifamily
Chris Mullen
<https://bmfcap.com>
111 S Main Street, Suite 1600
Salt Lake City, UT 84111
(801) 618-0521

3. Clarke Capital Partners
James Clarke | Tyler Hartmann
<http://clarkecp.com>
Multiple Office Locations
5152 N Edgewood Drive Suite 375
Provo, UT 84604
(801) 225-9990

4. Integrated Financial
<https://www.integratedfinancialgroup.com>
10610 South Jordan Gateway, Suite 210
South Jordan, UT 84095
(801) 993-0550

Vermont Family Offices

1. Hutner Capital
Daniel Hutner
<https://hutner.capital/history>
3546 Main Street
Manchester, VT 05254
(802) 366-8157
2. Manchester Capital
Drew Beresford
<https://mcmlc.com>
3657 Main Street
Manchester, VT 05255
(802) 362-4410

Virginia Family Offices

1. Alpha Omega Wealth
Clay Hilbert
<https://www.aowealth.com>
7202 Glen Forest Drive, Suite 300
Richmond, VA 23226
(804) 955-1600
2. Capital Fiduciary Advisors
Chris Williams
<https://capitalfiduciaryadvisors.com>
20130 Lakeview Center Plaza Suite 400
Ashburn, VA 20147
(703) 840-5490
3. JoycePayne Partners | Agili
Michael Joyce, CFA, CFP
<https://agilipersonalcfo.com>
1806 Summit Avenue, Suite 100
Richmond, VA 23230
(804) 358-2702
4. Keel Point
Joe Agee
<https://www.keelpoint.com>

5. Pitcairn

Rick Pitcairn

<https://www.pitcairn.com>

Washington Family Offices

1. Andersen

Dave Anderton

<https://andersen.com>

Global Offices

1200 Fifth Avenue, Suite 1600

Seattle, WA 98101

(206) 557-7880

2. Bristlecone Advisors

Kevin Berry | Piper Hanson

<https://www.bristleconeadvisors.com>

999 Third Avenue, Suite 600

Seattle, WA 98104

(206) 664-2500

3. Clark Nuber

Jeff Pannell

<https://clarknuber.com>

10900 NE 4th Street, Suite 1400

Bellevue, WA 98004

(425) 454-4919

4. Evergreen Gavekal

Tyler Hay | Jeff Eulberg

<https://www.evergreengavekal.com>

10500 NE 8th Street, Suite 950

Bellevue, WA 98004

(425) 467-4600

5. Hoban Family Office

Tom Hoban | Shawn Hoban

<https://hobanfamilyoffice.com>

2829 Rucker Avenue

Everett, WA 98201

(425) 654-6526

West Virginia Family Offices

1. Cunningham Dowell Alexander

Daniel Powell | James Alexander

<https://www.cpawv.com>

1544 Mileground Rd

Morgantown, WV 26505

(304) 292-9469

2. Bright Enterprises

William Bright

<https://brightwv.com>

200 Greenbrier Rd

Summersville, WV 26651

(304) 872- 3000

Wisconsin Family Offices

1. Endowment Wealth Management

Robert Riedl, CFP, CPA | Samuel Moore

<https://endowmentwm.com>

111 N. Broadway, Ste. 100

Green Bay, WI 54303

(920) 785-6010

2. Jacobus Wealth Management | RMB Capital

Richard Burridge | Seth Davis

<https://rmbcapital.com>

10361 W. Innovation Dr., Suite 350

Milwaukee, WI 53226

(414) 203-8040

3. Marshall Street Capital

Thomas Hauske | Bruce Betters

<https://www.mscap.com>

30 E. Kilbourn Ave., Suite 1400

Milwaukee, Wisconsin 53202

(414) 223-1560

4. RMR Wealth Advisors

Erik Mikkelsen | Doug Giageos, CFP

<https://www.rmradvisors.com>

400 Interlake Drive, Ste 200

Madison, WI 53716

(608) 663-7676

5. Vogel Consulting

Rhona Vogel, CPA

<http://vogelcg.com>

3415 Gateway Road, Suite 200

Brookfield, WI 53045

(262) 790-4960

Wyoming Family Offices

1. Frontier Administrative Services

<http://wyoprivatetrust.com>

PO Box 2554
Jackson, WY
(307) 734-1048

2. Gallatin Wealth

Laurent Roux
<https://www.gallatinwealthmgmt.com>
3415 N Pines Way, Suite 101
PO Box 2680
Jackson, Wyoming 83001
(307) 200.4343

3. The Certior Group

Avi Kantor | Hal Hersh Gordon
<http://certiorgroup.com>
5237 HHR Ranch Road, Suite 1
Wilson, WY 83014
(307) 264-0007

4. Willow Street

Phillip Harrington, Jr. | Laurent Roux
<https://willowstreetgroup.com>
255 Buffalo Way
PO Box 1905
Jackson, WY 83001
(307) 733-3327

Hey, if you want to learn how to do a better job of approaching family offices, preparing a pitch deck that sells your idea and understanding the key principles to success in the family office and advisory space check out my Capital School coaching and mentorship program. It's the same coaching program that students have used in countries ALL over the world to learn how to attract, raise and close HNW investor capital so they can build, buy, or scale their business – or fund a special project like real estate.

Learn more here and enroll today!

>> [Let's get started today](#) <<