

# Top Colorado-based Wealth Managers

Company	Assets under management	Main Office Mailing Address	City	Company Head Name	Company Head Email Address
Transform Wealth	\$1,600,000,000	6400 S. Fiddlers Green Circle, Suite 1600	Greenwood Village	Nathan Kubik	nathan@transformwealth.com
Alpine Bank Wealth Management	\$1,126,093,883	225 N. 5th St.	Grand Junction	Tim Kenczewicz	timkenczewicz@alpinebank.com
Northstar Investment Advisors	\$968,672,923	700 17th St. Suite 2350	Denver	Fred Taylor	fbtaylor@northstarinvest.com
First Affirmative Financial Network	\$892,923,783	5475 Mark Dabling Blvd, Suite 108	Colorado Springs	George Gay	georgegay@firstaffirmative.com
The Millstone Evans Group	\$698,000,000	4999 Pearl East Circle Suite 200	Boulder	Sacha Millstone	sacha@millstoneevansgroup.com
Wealth Strategies LLC	\$415,000,000	6455 S Yosemite Street, Suite 425	Greenwood Village	Travis Hart	travis.hart@wealthsg.com
Investment Trust Co.	\$400,000,000	3200 Cherry Creek South Drive Suite 730	Denver	Thomas Herrington	tlh@investmenttrust.com
Wambolt & Associates LLC	\$387,000,000	13976 W. Bowles Ave. Suite 200	Littleton	Greg Wambolt	greg.wambolt@wamboltwealth.com
PRISM Financial Strategies LLC	\$315,798,732	333 W. Hampden Ave., Suite 605	Englewood	Jeff Engelman	jeff@prismfinancialstrategies.com
Pilkington Financial Group LLC	\$300,000,000	9175 E Kenyon Ave Suite 201	Denver	Derek Pilkington	derek@pilkingtonfinancial.com
Valorem Financial	\$246,100,000	7609 Grandview Ave.	Arvada	Kim Gieseler/ Ted Swenson	kim@valoremfinancial.com
Strategic Wealth Partners	\$150,000,000	6455 S Yosemite St., Suite 425	Greenwood Village	Karen Jessey	Karen.Jessey@MyStrategicWealth.com
Advenire Family Offices	\$125,000,000	5755 Mark Dabling Blvd., Suite 245	Colorado Springs	Frank Vaughn	Frank@advenirewealth.com
Bauer Wealth Management	\$100,000,000	5755 Mark Dabling Blvd., Suite 245	Colorado Springs	Stephen Heitzmann	Stephen@bauerwealthmanagement.com
ACE Wealth Partners LLC	\$50,000,000	11001 W 120th Ave., Suite 400	Broomfield	Kevin McNab	kevin@acewealthpartners.com
Advenire Wealth Management	\$20,000,000	5755 Mark Dabling Blvd   Suite 245	Colorado Springs	Frank Vaughn	frank@advenirewealth.com

Based on self-reported assets under management