

## THE LIST

COMPILED BY TIMOTHY DOYLE

## Maine-based registered investment advisers

Ranked by assets under management by Maine office(s)

	Firm	Assets under management in Maine/ Total assets under management/	Licensed advisors, Maine/ Licensed advisors, total	Maine offices/ employees	Total offices/ employees	Top executive(s)
1	<b>R.M. Davis Inc.</b> 24 City Center, Portland 04101 774-0022 • rmdavis.com	\$6.8 billion \$6.8 billion	14 16	1 51	2 54	Geoffrey K. Alexander CEO
2	<b>H.M. Payson</b> One Portland Square, 5th Floor, Portland 04101 772-3761 • hmpayson.com	\$6.5 billion \$6.5 billion	21 21	3 50	3 50	Peter E. Robbins CEO Michael R. Currie president & managing director
3	<b>Vigilant Capital Management</b> One Monument Square, Suite 601, Portland 04101 523-1110 • vigilantcap.com	\$1.5 billion \$2.2 billion	6 17	1 14	2 29	Scott Sorensen Daniel M. Mulkern Jeff Carlisle principals
4	<b>Old Port Advisors</b> 130 Middle St., Portland 04101 774-6552 • oldportadvisors.com	\$911 million \$911 million	8 8	1 13	1 13	Fredric W. Williams founder & principal
5	<b>HeadInvest</b> 7 Custom House St., 4th Floor, Portland 04101 773-5333 • www.headinvest.com	\$885 million \$885 million	8 8	1 N/A	1 N/A	Carl G. Gercke partner & managing director
6	<b>Means Wealth Management</b> 802 Stillwater Avenue, Bangor 04401 207-947-6763 • meanswealth.com	\$760 million \$840 million	7 9	2 12	4 14	Erin Barry CEO Paul Means chairman Zachary Means president
7	<b>Great Diamond Partners</b> 22 Monument Square, Suite 300, Portland 04101 274-2500 • greatdiamondpartners.com	\$695 million \$695 million	5 5	1 10	1 10	Steven Tenney CEO
8	<b>Cribstone Capital</b> 155 Park Row, Brunswick 04011 844-2000 • cribstonecapital.com	\$440.2 million \$440.2 million	3 3	2 7	2 7	Amy Moolji chief investment officer, chief operating officer Scott Upham managing partner
9	<b>Bigelow Investment Advisors LLC</b> 4 Moulton Street, Portland 04101 207-772-2900 • bigelowadvisors.com	\$420 million \$420 million	3 3	1 N/A	1 N/A	Benjamin Flood Michael Moore Racquel Tibbetts managing partners
10	<b>Aries Wealth Management</b> 183 Middle St., Suite 4B, Portland 04101 207-536-0530 • arieswealthllc.com	\$367.5 million \$367.5 million	4 4	1 N/A	1 N/A	Laurie Latham principal Jason Viola president & founder

**NOTE:** If you would like to submit your firm's information for the list of Maine's largest Registered Investment Advisers, please email Timothy Doyle at [tdoyle@nebusinessmedia.com](mailto:tdoyle@nebusinessmedia.com).

**SOURCE:** Each firm by survey. Other firms were surveyed but did not respond.



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