

## THE LIST

COMPILED BY STEPHANIE MEAGHER

# Maine-based registered investment advisors

Ranked by assets under management (AUM) by Maine office(s)<sup>1</sup>

	Firm	AUM in Maine/ total AUM/	Licensed advisors in Maine/ total licensed advisors	Maine offices/ employees	Total offices/ employees	Top executive(s)
1	<b>H.M. Payson</b> One Portland Square, 5th Floor, Portland 04101 772-3761 • hmpayson.com	\$5.9 billion \$5.9 billion	19 19	3 54	3 54	Peter E. Robbins Michael R. Currie
2	<b>R.M. Davis Inc.</b> 24 City Center, Portland 04101 774-0022 • rmdavis.com	\$5.8 billion \$5.8 billion <sup>2</sup>	11 14	1 56	2 61	Geoffrey K. Alexander
3	<b>Vigilant Wealth Management</b> One Monument Square, Suite 601, Portland 04101 523-1110 • vigilantcap.com	\$1.5 billion \$2.3 billion	6 18	1 14	2 30	Scott Sorensen Dan Mulkern Jeff Carlisle
4	<b>HeadInvest</b> 7 Custom House St., 4th Floor, Portland 04101 773-5333 • headinvest.com	\$800 million \$800 million	8 8	1 16	1 16	Ken Blaschke Donna McConnell Steve Poulos Carl Gercke
5	<b>Means Wealth Management</b> 802 Stillwater Ave., Bangor 04401 947-6763 • meanswealth.com	\$676.8 million \$766 million	7 11	2 15	4 20	Erin Barry Paul Means Zachary Means
6	<b>Great Diamond Partners</b> 22 Monument Square, Suite 300, Portland 04101 274-2506 • greatdiamondpartners.com	\$560 million \$560 million	5 5	1 9	1 9	Steven Tenney
7	<b>Old Port Advisors Inc.</b> 130 Middle St., 2nd Floor, Portland 04101 774-6552 • oldportadvisors.com	\$522.9 million \$522.9 million	9 9	2 14	2 14	Jason E. Foster Tracy W. Rogers Fredric W. Williams
8	<b>Harpwell Capital Advisors LLC</b> 41 Campus Drive, Suite 203, New Gloucester 04260 877-427-7227 • harpwelladvisors.com	\$412.8 million \$412.8 million	7 7	1 N/A	1 N/A	John P. Moore
9	<b>Bigelow Investment Advisors LLC</b> 4 Moulton Street, Portland 04101 772-2900 • bigelowadvisors.com	\$388 million \$388 million	4 4	1 N/A	1 N/A	Benjamin Flood Michael Moore Racquel Tibbetts
10	<b>Aries Wealth Management</b> 183 Middle St., Suite 4B, Portland 04101 536-0530 • arieswealthllc.com	\$370 million \$370 million	4 4	1 5	1 5	Jason Viola
11	<b>Penobscot Financial Advisors<sup>3</sup></b> One Monument Square, Suite 501, Portland 04101 990-1901 • penobscotfa.com	\$344 million \$344 million	7 7	2 12	2 12	Hannah Tackett Craig Joncas Jim Bradley
12	<b>Harborview Advisors &amp; Investments</b> 111 Commercial St., 8th floor, Portland 04101 877-550-4900 • harborviewinvestments.com	\$277 million \$277 million	6 6	2 8	2 8	William Todd
13	<b>VanceGray Wealth Management Inc.</b> 128 Broadway, Bangor 04401 992-2819 • vancegray.com	\$256 million \$256 million	3 3	2 10	2 10	Vance B. Gray Jr.
14	<b>Choice Wealth Advisors</b> 325-D Kennedy Memorial Drive, Waterville 04941 873-0996 • choicewealthadvisors.com	\$220.4 million \$220.4 million	3 3	1 4	1 4	Matthew Libby Chris Markos

<sup>1</sup> Firms provided AUM figures for dates between Dec. 31, 2022 and Jan. 31, 2023. They were asked to use the same calculation methodology used to file the ADV form. AUM fluctuates daily with the market.

<sup>2</sup> Firm considers all assets attributable to Maine headquarters.

<sup>3</sup> Portland Integritas Advisors LLC is now affiliated with Penobscot Wealth Management d/b/a Penobscot Financial Advisors.

**SOURCE:** Each firm via survey. Note: Calif.-based EP Wealth Advisors closed its acquisition of Brunswick's Cribstone Capital on Dec. 31, 2022; the most recent ADV form available for Cribstone is from March 2022 with total AUM of \$377 million. N/A = Not available or not applicable.



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