

Top Area Wealth Management Firms

(RANKED BY 2015 WEST MICHIGAN ASSETS UNDER MANAGEMENT)

Company	Top West Michigan Executive	2015/2014 W. Mich. Assets Under Management	Certifications/Accreditations	Broker/Dealer Affiliates	Commissions, Fees or Both	Specialization
1 Zhang Financial 2828 Kraft Ave. SE, Suite 100 Grand Rapids 49512 p. (888) 777-0126 f. (269) 385-5705 zhangfinancial.com	Charles Zhang Lynn Chen-Zhang	\$3.33B \$2.04B	CFP, MBA, ChFC, MSFS, CLU	LPL Financial, TD Ameritrade	Fees	Asset management, retirement planning, investment advice, financial planning, wealth management
2 VantagePointe Financial Group 3333 Evergreen St. NE Grand Rapids 49525 p. (616) 534-9632 f. 534-1340 vpfgroup.com	David Pasciak	\$2.00B \$2.00B	DND	Signature Investors Inc.	Both	Building life long relationships with clients while becoming a valuable resource to families and businesses
3 Centennial Securities Co. Inc 3075 Charlevoix Drive SE Grand Rapids 49546 p. (616) 942-7680 f. 942-6389 centennialsec.com	DND	\$1.50B DND	CFA	Centennial, Wells Fargo, Schwab and Fidelity	Both	DND
4 Norris, Perne & French LLP 40 Pearl St. NW Grand Rapids 49503 p. (616) 459-3421 f. 459-5369 norrisperne.com	Stephen Wert	\$1.16B \$1.10B	CFA, CPWA	DND	Fees	Asset management for individuals, foundations and corporate clients
5 Stifel 5181 Cascade Road SE Grand Rapids 49546 p. (616) 942-1717 f. 942-2412 stifel.com	Paul Druke	\$998.29M DND	DND	Stifel, Nicolaus & Co. Inc.; Century Securities Associates; Stifel Bank & Trust; Stifel Trust Co.	Both	Full-service wealth management and investment banking
6 Northwestern Mutual 55 Campau Ave. NW Grand Rapids 49503 p. (616) 774-2031 f. 774-0338 nm.com	Mitchell B. Glover	\$869.52M \$793.20M	WND	NMIS	Both	Financial planning
7 Discovery Financial LLC 971 Spaulding SE, Suite A Ada 49301 p. (616) 957-9999 f. 957-9949 discoveryfinancialllc.com	David Muilenberg	\$375.00M \$350.00M	CLU, ChFC, AIF	LPL Financial	Both	Wealth management, financial planning, 401k and deferred compensation
8 Lorence & Vander Zwart 240 S. River Ave. Holland 49423 p. (616) 394-4994 f. 394-5986 lvzfinancialplanning.com	DND	\$357.55M \$331.19M	DND	DND	DND	DND
9 Rehmann 2330 East Paris Ave. SE Grand Rapids 49546 p. (616) 975-4100 f. 975-4400 rehmann.com	Ronald Knipping	\$281.15M \$258.66M	CFP, MBA, AIF, CRPC, CPA, MST, EA	Royal Alliance, Fidelity, Pershing, SEI, Pershing Advisor Solutions	Both	Asset management, integrated tax and financial planning, estate planning, risk management, 401k and retirement
10 Advance Capital Management Inc. 2959 Lucerne Drive SE Grand Rapids 49546 p. (616) 954-2066 f. 954-2499 acadviser.com	Ryan Sheffer Nancy Vandenberg	\$279.21M \$257.78M	CFP	Advance Capital Services Inc.	Both	Retirement, financial and tax planning
11 Benjamin F. Edwards & Co. 4940 Cascade Road SE Suite 210 Grand Rapids 49546 p. (616) 974-3000 f. 974-9027 benjaminfedwards.com	Todd Brandstadt Deborah Lambrich	\$250.00M \$250.00M	CFP	Benjamin F. Edwards & Co.	Both	Long-term, strategic generational planning, strategic planning for executives and corporate retirement plan benefits
12 Calder Investment Advisors 96 Monroe Center St. NW, Suite 305 Grand Rapids 49503 p. (616) 235-2442 f. 235-2460 calderadvisors.com	Dirk Racette Thomas Glover Patrick Newcombe Robert Stark Marcia Force	\$222.33M \$225.93M	CFP, CFA, CPA	DND	Fees	Portfolio management, retirement plan administration, retirement income planning, Social Security planning
13 Henrickson Nauta Wealth Advisors 6290 Jupiter Ave., Suite B Belmont 49306 p. (616) 361-9308 f. 361-9370 hnwealthadvisors.com	Doug Henrickson Jeff Nauta	\$211.49M \$209.04M	CFA, CFP, CAIA, CIMC, AIF, CDFIA	Triad Advisors Inc.	Both	Comprehensive wealth management for business owners, executives and independent women
14 First Mutual Investment Mgmt. Inc. 688 Cascade West Parkway SE Grand Rapids 49546 p. (616) 957-4210 f. 957-9946 firstmutualinvestment.com	Dennis Joppe	\$211.00M \$205.00M	CFP, CFS, MSFS	LPL Financial	Both	Retirement, financial and tax planning
15 Ameriprise Financial 6437 28th Ave. Hudsonville 49426 p. (616) 662-0420 f. 662-0421 ameripriseadvisors.com/brian.j.timmer	Brian Timmer	\$193.00M \$191.00M	CFP, CLU	Ameriprise Financial	Both	Retirement income portfolios, retirement plan rollovers
16 Grand Wealth Management LLC 200 Ottawa Ave. NW Grand Rapids 49503 p. (616) 451-4228 f. 451-4229 grandwealth.com	Jeff Williams Ellie Winter	\$187.11M \$181.88M	CFP, CIMA, AIF, CPA/PFS	None	Fees	Wealth management, institutional investment management, retirement plan advisory services for select clients
17 Argus Financial Consultants 971 Spaulding Ave. SE, Suite B Ada 49301 p. (616) 949-8300 f. (877) 696-1919 eyeonargus.com	Chris Engle Brian Sandberg Ryan Smith	\$150.00M \$140.00M	CFP, ChFC, AEP, CASL	LPL Financial	Both	Help clients create and maintain wealth to assist in meeting their current and future financial objectives
18 Lake Michigan Credit Union 2024 Celebration Drive NE Grand Rapids 49525 p. (616) 242-9790 f. DND lmcu.org	James Snav	\$142.70M DND	RIA, CRPC, AWMA	LPL Financial, Member FINRA / SIPC	Fees	Investment and retirement planning
19 West Michigan Community Bank 99 E. 8th St. Holland 49423 p. (616) 669-1280 f. 669-7944 wmcb.com	Steve Woodcock	\$139.90M \$127.78M	DND	Investment Professionals Inc.	Both	DND
20 JVL Associates LLC 1535 44th St. SW Wyoming 49509 p. (616) 261-2800 f. 261-2866 jvlassociates.com	Jerry VanderLugt	\$137.29M \$139.49M	CPA, CFP, CVA	None	Fees	Estate planning, wealth transfer strategies
21 Huizenga & Associates 44 E. 8th St., Suite 235 Holland 49423 p. (616) 392-6614 f. 392-6694 tim-huizenga.com	Tim Huizenga	\$120.00M \$118.50M	CFP, ChFC	Ameriprise Financial	Both	Pre-retirees, retirees

State champ

Zhang Financial's Charles Zhang was named the top financial advisor in Michigan by Barron's for the fourth straight year.

Wert is first

Stephen Wert was announced as Norris, Perné & French's first managing partner in January.

Target acquired

Stifel completed its acquisition of Barclays Wealth Americas in December.

Good advice

Rehmann was named one of Planadviser's top 100 retirement plan advisers for 2016 earlier this month.

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22 Voisard Asset Management Group 99 Monroe Ave. NW, Suite 504 Grand Rapids 49503 p. (616) 988-5778 f. 988-5778 voisardgroup.com	Douglas Voisard	\$117.04M \$119.01M	CFP	None	Fees	Portfolio management, retirement planning, financial planning, retirement plan accounts
23 Gamache & Associates 816 Maple Ave. Holland 49423 p. (616) 392-1040 f. 392-7160 rogergameche.com	Jeffrey Heitzman	\$93.00M \$91.00M	MSFS, CFP, CLU, ChFC	Ameriprise Financial	Both	Retirement income solutions, holistic financial advice
24 Advanced Asset Management 4555 Wilson Ave. SW Grandville 49418 p. (616) 531-5220 f. 531-7773 aamllc.com	Ronald J. VanSurksum	\$73.49M \$67.63M	CFP, NAPFA	None	Fees	Financial planning and investments
25 Heitzman & Associates Inc. 233 E. Fulton St., Suite 224 Grand Rapids 49503 p. (616) 774-2372 f. 774-9099 heitzman-associates.com	Jeffrey Heitzman	\$58.40M \$63.90M	CFP, ChFC	Cetera Advisors	Both	Retirement planning
26 Ron Courser & Associates 2900 Charlevoix Drive SE Grand Rapids 49546 p. (616) 301-2581 f. 301-2593 roncourser.com	Ron Courser	\$52.00M \$50.00M	CFP	Kalos Capital	Both	Wealth management, retirement income planning
27 Synergy Wealth Management 660 Cascade W. Parkway SE, Suite 250 Grand Rapids 49546 p. (616) 285-7818 f. 285-7819 synergywm.com	Fredrick Iacovoni Tyler Kotlarz	\$18.17M DND	CFP, AWMA	None	Fees	Fiduciary investment, retirement and financial planning, small business 401(k) and deferred compensation plans
Financial Advisory Corp. 4251 Cascade Road SE Grand Rapids 49546 p. (616) 235-5260 f. 235-0512 financialadvisorycorp.com	Paul Anthes Loran Filson Andrew Roberts Joel Vander Meyden Christopher Still Ryan Allen	DND DND	CFP	Independent	Fees	Investment and wealth management
Forest Hills Financial Inc. 3210 Eagle Run Drive NE, Ste. 104 Grand Rapids 49525 p. (616) 949-6006 f. 949-8911 myfhf.com	Jaime Westenbarger Barton Steindler	DND DND	DND	DND	Both	Retirement planning, retirement income distribution
Success Financial Group LLC 4144 Chicago Drive SW Grandville 49418 p. (616) 261-9480 f. 261-9507 successfin.com	Lindsey Chrystan	DND DND	CFP	Summit Brokerage Services	Both	Retirement planning, money management

The Grand Rapids Business Journal list of top area wealth management firms, ranked by 2015 West Michigan assets under management, is the most comprehensive available. The list is based on responses to Business Journal surveys. The Business Journal defines "West Michigan" as Allegan, Kent, Ottawa and Muskegon counties. The Business Journal surveyed 88 companies; 32 returned surveys and 30 are listed. To be considered for future lists, e-mail jobrien@geminipub.com. DND = Did not disclose

Fore a good cause

In June, Forest Hills Financial Inc. will host its third annual charity golf outing with proceeds benefitting Kids' Food Basket of West Michigan.

New credentials

Success Financial Group president Lindsey Chrystan obtained the Certified Wealth Strategist industry designation in January.

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