# Best Financial Advisors in Houston 2026: Fees and Services

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With the number of financial advisors in Houston, choosing a financial advisor can be a challenge. Whether you're looking for a CFP® or a CFA, a fee-only fiduciary or a wealth manager, this list of the top 10 best financial advisors, which includes comparing their costs and prices and how much you can spend.

Then being said, we understand digging through all the firms and data points is an undertaking, so we compiled the most important information here for you to make it easier. To identify the best financial advisors in Houston, we looked at firms that manage billions of assets and offer financial services to individuals and families. We also looked at firms that specialize in wealth management and/or which prioritize a general mastery for the firm's culture, and clients which indicates how much attention they may get at a firm.

Our ranking does not necessarily indicate which firm may be best for you, but it can help simplify the shopping experience. Look at a few factors for the top firms in Houston and their key highlights:

| Firm's Financial Advisor Fees | 0.25% - 1.00% | 0.50% - 1.00% | 0.75% - 1.00% | Firm's Fiduciary Service? |
|---|---|---|---|---|
| Fee-only or Commission-based | Fee-only | Fee-only | Fee-only | Yes |

## 10 best financial advisors in Houston

| Firm name | Minimum Assets Required | Fee Structure |
|---|---|---|
| Avalon Investment & Advisory | $5 million | 1 percentage of AUM First Hundred Million (AUM combination and client fees may be negotiable when client relationship exceeds $100 million) |
| Linscomb & Williams | $1 million | 1 percentage of AUM First Million |
| UBS & Wealth | $50,000 | 1 percentage of AUM First Fees |
| Paul Comstock Partners | $1 million | Percentage of AUM Fees |
| GFS Advisors LLC | Not specified | 1 percentage of AUM Performance-based fees |
| Americana Partners, LLC | Not specified | 1 percentage of AUM Fees |
| STA Wealth Management, LLC | $500,000 | 1 percentage of AUM Hourly charges |
| Chilton Capital Management LLC | Not specified | 1 percentage of AUM |
| Cordia Investment Management, LLC | Not specified; Recommended annual fee of $5,000 | 1 percentage of AUM Fees |
| Investment Capital, LLC | No account minimum | 1 percentage of AUM Fees |

## Methodology and criteria

For our search, we looked at firms across the city of Houston. All of the firms considered are found by Fiscorp data, registered with the U.S. Securities and Exchange Commission (SEC) and offer individual account management and financial planning services.

The firms that met this criteria were ranked based on their AUM and client to advisor ratio. These ratios are important because they can indicate how much attention a client may receive from their advisor and how good a firm might be. Our ranking is then adjusted to reflect what firms are designed to help certain groups, but not indicate which firms may be best for you.

As our review, we've listed several other key factors that will help you determine which financial advisor is more fitting for your investing style and financial needs. It is important to note that did not include any firm that charges a flat fee, or any firm that charges a flat fee for their fiduciary disclosure currently as of October 19, 2025, but urge you to evaluate these firms on https://adviserinfo.sec.gov/.

## 1. Avalon Investment & Advisory

FIND AN ADVISOR

- **Minimum assets required:** $5 million
- **AUM:** $1.75 billion
- **Individual investor to advisor ratio:** 30:1
- **Fee structure:**
  - 1 percentage of AUM
  - Performance-based fees
  - Fee combination and concerning arrangements with other, closed-portfolios
- **Firm phone number:** (713) 840-1500
- **Headquarters address:** 1000 Bell Street, Suite 300 Houston, TX 77019-1124

### About Avalon Investment & Advisory

Founded in 2001, Avalon Investment & Advisory is an independent firm owned by its employees, clients and investors, including the private equity firm Cyclesian Group. It has offices in Houston and San Antonio.

The firm offers financial planning and portfolio management services, primarily to high-net-worth individuals and families. It also provides services to institutional investors, including management a net worth of at least $1.5 million. Avalon Investment & Advisory typically requires an account of at least $5 million to act as an investment manager, though private funds the firm oversees may have lower minimum investment requirements.

### Avalon Investment & Advisory investing strategy

Avalon Investment & Advisory considers client goals and risk tolerance when creating a personalized asset allocation strategy. That strategy may include a mix of the firm's fixed income or equity strategies, as well as specialty accounts or private funds.

Taking a fundamental, long-term approach, Avalon Investment & Advisory aims to choose investments that will provide long-term capital growth and low risk exposure.

### Avalon Investment & Advisory disciplinary disclosures

Avalon Investment & Advisory has been cleared of any SEC violations in its most recent Form ADV. However, the firm has faced several civil and institutional lawsuits. An account of at least $1 million is generally required.

The firm has four Texas offices in Houston, San Antonio, Austin and Fredericksburg, and offices in Birmingham, and in Atlanta.

### Avalon Investment & Advisory fees

Linscomb & Williams charges individualized fees for its clients based on their financial situation. Portfolios may focus on capital growth or wealth preservation, and make of either mutual funds or individual stocks.

The firm has an investment committee that is responsible for choosing which securities to recommend to clients. When evaluating investments, the committee uses several criteria, including:

- Price-performance history
- Portfolio manager data
- Qualitative and quantitative due diligence
- Compatibility with the rest of the portfolio

## Linscomb & Williams disclosures

Linscomb & Williams has been cleared of any violations in its most recent Form ADV, requires an registered investment advisory to disclose a firm's Form ADV upon request and offers a wide variety of financial planning to individuals, as well as to research, banking and finance services to institutions and companies.

The majority of the firm's clients are individuals and high net worth individuals, though it also provides services to institutional investors. It has two offices in Houston, one in Austin and one in Dallas and Atlanta.

## Linscomb & Williams investing strategy

Linscomb & Williams considers individual investment goals when creating a client's needs and objectives. Additionally, investment strategies may vary depending on the advisor overseeing the account as well as whether the account is managed by a team or by a single advisor.

The firm's investment strategies are generally based off one of the following categories:

- **Equity – Capital Appreciation:** This strategy focuses on growth in company value and the increase in stock prices for an individual company. It may involve selling covered calls.
- **Equity – Income and Capital Appreciation:** This strategy focuses on dividend income, with a secondary focus on capital appreciation. It may include a fixed income allocation of 10% – 20% of the portfolio, depending on the client's needs.
- **Equity – Covered Call Strategy:** This strategy primarily involves selling covered calls against equity positions in a portfolio.
- **Balanced:** This strategy includes a mix of fixed income securities and cash, based on a client's financial situation. It may include selling or buying puts and covered calls, or selling covered calls.
- **Fixed Income:** Cash and fixed income securities are the portfolio, with the most crossed exceptions, including preferred securities.

## UBS & Wealth disclosures

UBS & Wealth Cover has disclosures, meaning there aren't any civil, criminal or regulatory actions against the firm, its employees or affiliates. The firm's most recent registered investment advisory to disclose said events that clients might consider material. You can read the firm's Form ADV page for more information.

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## 4. Paul Comstock Partners

FIND AN ADVISOR

- **Minimum assets required:** $1 million
- **AUM:** $2,301,131,246
- **Individual investor to advisor ratio:** 70:1
- **Fee structure:**
  - Percentage of AUM
  - Fees
- **Firm phone number:** (713) 977-2496
- **Headquarters address:** 1100 Holcombe Drive, Suite 500 Houston, TX 77027

### About Paul Comstock Partners

Paul Comstock Partners is a fee-only registered investment advisory firm owned primarily by its CEO, Alexis Comstock Weiss. Weiss Paul Comstock, founded the firm in 1987 and remains a board member and minority owner.

Paul Comstock Partners generally provides wealth for each individuals families with investment assets of at least $1 million, and aims to provide them investment advisory and wealth management services, including financial planning services. The firm also provides individuals foundations and charitable organizations, trusts and other entities.

## Paul Comstock Partners investing strategy

Paul Comstock Partners aims to create a diversified portfolio of stocks and bonds as well as liquid fixed income securities. The firm's investment committee manages the clients can use in-house such a portfolio.

Paul Comstock Partners also considers alternatives, including, using a mix of both traditional and alternative assets. The firm takes a long-term investing approach, and aims to create a diversified portfolio with between money, even with short-term fluctuations in value.

## Paul Comstock Partners disciplinary disclosures

Paul Comstock Partners has had no disclosures over the past 10 years. The SEC requires all registered investment advisors to disclose disclosures that the SEC any civil, criminal or regulatory actions against the firm, its employees or affiliates. For more information on the firm, view its ADV page.

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## 5. GFS Advisors LLC

FIND AN ADVISOR

- **Minimum assets required:** Not specified
- **AUM:** $227,538,227
- **Individual investor to advisor ratio:** 25:1
- **Fee structure:**
  - Percentage of AUM
  - Performance-based fees
- **Firm phone number:** (713) 960-0000
- **Headquarters address:** 1100 Post Oak Blvd., Suite 2100 Houston, TX 77056

### About GFS Advisors LLC

Private equity firm Lone Star Equity Partners, LLC principally owns GFS Advisors, which was founded in 2001. The firm is affiliated with Global Financial Services LLC, which serves as a broker-dealer firm allowing clients to purchase securities directly.

GFS Advisors provides investment advisory and financial planning services to primarily high net worth individuals, though it also works with a number of private investment companies, as well as charitable organizations and other businesses. It has one office in Houston.

## GFS Advisors LLC investing strategy

GFS Advisors LLC considers clients' investment goals when creating a personalized financial plan, which can include a wide range of investments, including individual stocks and bonds, mutual funds or exchange-traded funds, alternative investments and other assets.

To select investments, GFS Advisors considers a variety of factors, including performance, management versus, portfolio turnover, fees and dimensionalities derived from quantitative analysis, which looks at a company's balance sheets. Once portfolios are created, GFS Advisors LLC aims to rebalance on ongoing basis, rebalancing under a recommended range of allocations.

## GFS Advisors LLC disciplinary disclosures

All registered investment advisors must disclose disclosures that the SEC any civil, criminal or regulatory actions against it, its employees or affiliates that clients might consider material when evaluating the firm. GFS Advisors has no disclosures on its Form ADV page. Investing Global Financial Services, the registered broker-dealer with which the firm is affiliated.

In 2014, Global Financial Services paid $100,000 to settle allegations that it did not implement adequate anti-money laundering and suspicious activities. Global Financial Services also paid $50,000 in civil fines.

For more information on the firm and its disciplinary history, see its ADV page.

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## 6. Americana Partners, LLC

FIND AN ADVISOR

- **Minimum assets required:** Not specified
- **AUM:** $1,000,000,000
- **Individual investor to advisor ratio:** 15:1
- **Fee structure:**
  - 1 percentage of AUM
  - Fees
- **Firm phone number:** (713) 629-0312
- **Headquarters address:** 811 Louisiana Street, Suite 2400 Houston, TX 77002

### About Americana Partners, LLC

President and founder Lance Pierce founded Americana Partners, LLC in 2010, after leaving Morgan Stanley after a team of 11 associates. Pierce is the primary owner of the firm, which has offices in Dallas, Austin and Houston.

Americana Partners offers investment advisory and wealth management, and a range of financial planning and consulting services, primarily to individuals and high net worth individuals. It can also serve trusts, estates, charitable organizations and businesses.

## Americana Partners, LLC investing strategy

Americana Partners creates individualized portfolios for clients using a variety of analysis techniques. Portfolios primarily include individual securities, though the firm may also recommend mutual funds clients invest in alternative investments, such as hedge funds.

In addition to stocks, fixed income and exchange-traded funds, portfolios also may include alternative investments, such as hedge funds. The firm's investment committee is responsible for these advisor public discretion, as well as their investment strategy and investment decisions.

## Americana Partners, LLC disciplinary disclosures

Americana Partners has had no disclosures since its founding. All registered investment advisors must disclose in documents with the SEC any civil, criminal or regulatory actions that involve either the firm or its employees or affiliates and that clients might consider material when evaluating the firm or its team. For more information on Americana Partners, visit its ADV page.

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## 7. STA Wealth Management, LLC

FIND AN ADVISOR

- **Minimum assets required:** $500,000
- **AUM:** $1,000,000,000
- **Individual investor to advisor ratio:** 50:1
- **Fee structure:**
  - 1 percentage of AUM
  - Hourly charges
  - Fees
  - Other (Combination of greater investment vehicles)
- **Firm phone number:** (281) 862-9800
- **Headquarters address:** 2401 Fountain View Drive, Suite 700 Houston, TX 77057

### About STA Wealth Management, LLC

STA Wealth Management, LLC was founded by Steven Anderson in 2002 with business partner Michael Smith. Steven was formerly a partner at Smith Barney (Citi) and has changed his name to STA Wealth Management in 2015.

Smith and Anderson still work at the firm, serving as president and chief executive officer/chief investment officer, respectively. They co-lead STA Wealth Management along with the firm's chief operating officer and executive vice president.

STA Wealth Management provides discretionary investment management services — meaning it has the authority to sign off on investing decisions without the clients approval — primarily to individuals and high net worth individuals. It also offers stand-alone financial planning services, including retirement planning, estate planning and business support to a traditional account of the firm.

In addition to its Houston headquarters, the firm has an office in Sugar Land, Texas.

## STA Wealth Management, LLC investing strategy

STA Wealth Management generally delivers clients on a discretionary basis, meaning the firm has the authority to make decisions on a client's behalf, and only in very limited cases will it offer non-discretionary management.

In general, clients portfolios are based on the information they provide at the outset of the relationship, including their investment objectives and risk tolerance. The firm's investment committee is responsible for using all sources to build diversified portfolios that may include mutual funds, exchange-traded funds, stocks and bonds, and other cash, hedge transactions and options.

## STA Wealth Management, LLC disciplinary disclosures

STA Wealth Management does not have any disciplinary disclosures. All registered investment advisors must disclose such incidents in documents with the SEC that clients might consider material when evaluating the firm or its team. You can get more information on the firm by viewing their disclosure on its ADV page.

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## 8. Chilton Capital Management LLC

FIND AN ADVISOR

- **Minimum assets required:** No account minimum
- **AUM:** $1,500,251,485
- **Individual investor to advisor ratio:** 150:1
- **Fee structure:**
  - 1 percentage of AUM
- **Firm phone number:** (713) 626-1900
- **Headquarters address:** 1177 West Loop South, Suite 1700 Houston, TX 77027

### About Chilton Capital Management LLC

Founded in 1990, Chilton Capital Management is now majority-owned by Hoagy Bradford, LLC, a private company owned by firm president Jason Bradford. Combined, Jason and Hoagy Bradford, other employees of Chilton Capital Management owning the remaining 30% of the firm.

The firm offers fee-only investment management and financial planning services, primarily to individuals and high net worth individuals as well as institutional investors. It also provides institutional services, including investment consulting services to other registered investment advisors (RIAs).

## Chilton Capital Management LLC investing strategy

Chilton Capital Management's investment strategy includes a mix of fixed income securities and equities. The firm's investment committee is responsible for using a variety of strategies, such as which is overseen by an investment team and including:

- **Growth & Income Strategy:** Focused on providing cash flow and preserving capital.
- **High Quality Fixed Income Strategy:** Focuses on fixed income securities with the least amount of risk.
- **S&P Strategy Strategy:** Uses non-equity investment trusts and real estate-related entities as complement to non-mortgage portfolios.
- **Sector-Defined Risk:** Designed to generate income in all markets and protect investments in down markets.

When creating portfolios for clients, Chilton Capital Management uses a variety of investments, including such popular and private stocks and bonds, hedge investment strategies, mutual investment funds, options and bonds.

## Chilton Capital Management LLC disciplinary disclosures

Chilton Capital Management has had no disclosures since its founding. All registered investment advisors must disclose such incidents in documents with the SEC that clients might consider material when evaluating the firm or its management team. You can learn more about the firm by viewing Chilton's Capital Management's ADV page.

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## 9. Cordia Investment Management, LLC

FIND AN ADVISOR

- **Minimum assets required:** Not specified; Recommended annual fee of $5,000
- **AUM:** $ 200,000,000
- **Individual investor to advisor ratio:** Not specified
- **Fee structure:**
  - 1 percentage of AUM
- **Firm phone number:** (713) 619-8080
- **Headquarters address:** 8800 Bellaire Blvd., Suite 200 Houston, TX 77036

### About Cordia Investment Management, LLC

Cordia Investment Management, LLC was founded by President and Chief Cordia Investment Management in 1999 and remains its primary owner. The firm offers portfolio management services and pension consulting. It provides its services primarily to individual investors, both who do not or have the $25 definition of high net worth, as well as pension and profit sharing plans, trusts, estates, charitable organizations and businesses.

Cordia Investment Management has its headquarters and additional offices in Austin and Dallas.

## Cordia Investment Management, LLC investing strategy

Cordia Investment Management considers clients' investment goals when creating a client's investment decisions. To identify suitable investments, the Cordia Investment Management team evaluates comparable based on their organizational, operational, and financial strengths.

## Cordia Investment Management, LLC disciplinary disclosures

Cordia Investment Management has had no disciplinary disclosures since its founding. All registered investment advisors must disclose such incidents in documents with the SEC that clients might consider material when evaluating the firm or its management team. You can learn more about the firm by viewing Cordia Investment Management's ADV page.

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## 10. Inscription Capital, LLC

FIND AN ADVISOR

- **Minimum assets required:** No account minimum
- **AUM:** $ 200,234,179
- **Individual investor to advisor ratio:** Not specified
- **Fee structure:**
  - 1 percentage of AUM
- **Firm phone number:** (713) 619-8080
- **Headquarters address:** 2925 Richmond Avenue, Suite 425 Houston, TX 77098

## About Inscription Capital, LLC

Former UBS brokers Brian Bova, David Leeds Eustis and Marc Oster founded Inscription Capital in 2018 and remain the firm's co-owners. The firm provides financial planning, consulting, investment management and family office services primarily to individuals, both high net worth and otherwise. It has two offices in Houston.

## Inscription Capital, LLC investing strategy

Inscription Capital uses customized models and portfolio strategies that may include individual securities, funds, structured products, options and alternative investments. Additionally, the firm may also recommend that clients invest a portion of their portfolios with external managers. In some cases, Inscription Capital may recommend that clients use the Betterment Institutional robo-advising platform to implement their portfolios.

In general, Inscription Capital takes a long-term approach to investing, aiming to hold assets for at least a year. However, advisors may sell holdings after a shorter period to rebalance a portfolio, meet client needs or respond to a change in the fundamental value of the asset or sector.

## Inscription Capital, LLC disciplinary disclosures

Inscription Capital reports no disciplinary disclosures within the last 10 years. All registered investment advisors must disclose in their Form ADV documents filed with the SEC any civil, criminal or regulatory actions against either the firm or its employees or affiliates. For more information, visit Inscription Capital's IAPD page.

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## Financial advisors in Houston: FAQs

What tax implications should I be aware of in Houston that might affect my financial advising decisions? −

While there's no state income tax in Texas or state inheritance or estate taxes, Houston residents still need to consider the impact of local property taxes on their portfolio. It's also always important to plan for federal income taxes.

Do all financial advisor firms specialize in retirement planning? +

Should I get a fee-only or fee-based financial advisor in Houston? +

Why is it important to find a fiduciary financial advisor in Houston? +

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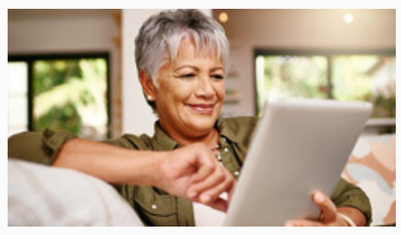
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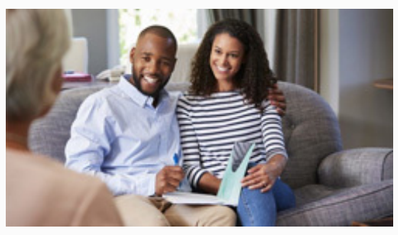
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