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Choate Wealth Ranks in Top 40 Largest Fee-Only RIAs Nationwide in 2026

Choate Wealth's Investment Management team, Choate Investment Advisors, has been ranked among the top 40 of 150 largest fee-only financial planning firms in the U.S. for 2026 by *Financial Planning*. Eligible firms operate exclusively on a fee-only model, serve primarily individual or high net worth clients, and have no ties to commission-based activities. The complete list accompanies a feature article entitled, "RIA Leaders 2026: The custody fee conundrum" published on the *Financial Planning* website on November 3, 2026.

Built on more than 100 years of history and experience, Choate Wealth is a fully integrated, high-touch, multi-family office. We provide coordinated and highly personalized advice for high net worth individuals and families on estate, philanthropic, and tax planning, and we offer professional trustee services and independent investment management advice, provided through our subsidiary, Choate Investment Advisors LLC, a SEC-registered investment advisory firm with more than $10 billion of assets under management (*as of 6.30.26*).

Financial Planning's data partner for the RIA Leaders feature, FINTRX, produced the rankings by applying specific criteria to firms' required SEC Form ADV filings in August 2026:

- Firms must have zero registered representatives of a broker-dealer.
- At least 50% of the firm's clients must be individuals or high net worth individuals.
- Firms must not list commissions as a compensation arrangement.
- Firms must have more than zero financial planning clients.
- Firms must not list commission-taking businesses in "other business activities."
- Firms cannot be affiliated under common ownership with commission-taking businesses.

In the absence of an official regulatory classification and definition for the titles "financial planner" or "financial advisor," FP is citing the numbers available through FINTRX's analysis of how many "producing financial advisors" there are at each firm. While client assets under management remains a fluid figure tied to asset values, incoming and outgoing client assets and a number of other factors, RIAs typically state their latest available AUM each March in SEC filings. Some firms later update those figures in amended filings.

This ranking does not evaluate the quality of services provided to clients and is not indicative of the practice's future performance. Choate Wealth did not pay a fee to Financial Planning or FINTRX in exchange for the production of RIA Leaders or for inclusion on the list. Choate Wealth does pay a licensing fee for permission to use this award in advertising.

Choate Investment Advisors is an investment adviser registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about Choate Investment Advisors' investment advisory services can be found in its Form ADV Part 2 and/or Form CRS, which is available on choatewealth.com or upon request.

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