

---

# Top 10 Financial Advisors in Jacksonville, FL

*Ranked by blended metrics (AUM, planning, custody, insurance, and RSU/PSU capabilities)*

---

## 1. Jacksonville Wealth Management (JWM)

- **Approx AUM:** ~\$435M
  - **Custody options:** Major custodians (e.g., Schwab, Fidelity, Pershing-style platforms).
  - **Planning & wealth focus:** Full-service wealth management plus comprehensive financial, retirement, and business-owner planning.
  - **Insurance & RSU/PSU:** Limited insurance focus; general RSU/PSU and stock-compensation support, but not heavily branded.
  - **Why it ranks:** Highest AUM-weighted score among Jacksonville-based firms and strong local recognition.
- 

## 2. Sanchez Wealth Management Group

- **Approx AUM:** ~\$465M
  - **Custody options:** Standard RIA-style custodians.
  - **Planning & wealth focus:** Holistic planning, portfolio management, and coordination with other specialists (e.g., private funds).
  - **Insurance & RSU/PSU:** Moderate insurance access; general equity-compensation experience.
  - **Why it ranks:** One of the largest local firms by AUM per advisor and long track record.
- 

## 3. InVestra Financial

- **Approx AUM:** Range \$300M / \$1B+ (GuidedWealth.com ecosystem) + firm-wide larger AUM.
- **Custody options:** LPL-hosted platform with Guided Wealth Portfolios and digital-investing custody.
- **Planning & wealth focus:** Deep planning, legacy planning, women-focused strategies, business-exit planning, and digital-first advice.
- **Insurance & RSU/PSU:** Strong insurance integration and explicit RSU/PSU, ESPP, and concentration-strategy support for executives and tech-sleeve clients.

- **Why it ranks:** High-specialization boutique; ideal for RSU-heavy, tech-sleeve, and digitally-savvy clients.
- 

## 4. Douglas Capital Management

- **Approx AUM:** ~\$104M
  - **Custody options:** Independent RIA custodians; no proprietary brokerage.
  - **Planning & wealth focus:** Fee-only investment management and consulting; lighter planning emphasis.
  - **Insurance & RSU/PSU:** Minimal insurance focus; basic equity-compensation where it aligns with investment management.
  - **Why it ranks:** Best for clients who want clean, low-conflict, investment-only management.
- 

## 5. Life Planning Partners, Inc.

- **Approx AUM:** ~\$312M
  - **Custody options:** Standard custodial platforms.
  - **Planning & wealth focus:** Deep planning with emphasis on retirement income, pension consulting, and decumulation.
  - **Insurance & RSU/PSU:** Limited insurance emphasis; general RSU/PSU but not branded as a stock-compensation specialist.
  - **Why it ranks:** Strong choice for retirees and pre-retirees with pensions and defined-benefit exposure.
- 

## 6. TrustWell Financial Advisors, LLC

- **Approx AUM:** ~\$219M
  - **Custody options:** Standard custodial platforms.
  - **Planning & wealth focus:** Financial planning plus portfolio management; family-oriented and mid-sized portfolios.
  - **Insurance & RSU/PSU:** Some insurance integration; basic RSU/PSU support.
  - **Why it ranks:** Solid “planning-plus” option for families with moderate to large portfolios.
- 

## 7. Waverly Advisors (Jacksonville office)

- **Approx AUM:** Not publicly itemized; mid-size to high-net-worth firm.
  - **Custody options:** Major custodians (e.g., Schwab, Fidelity) for family-office style clients.
  - **Planning & wealth focus:** High-net-worth family planning, wealth management, and tax-coordination.
  - **Insurance & RSU/PSU:** Access to insurance structures; some executive-compensation and RSU work.
  - **Why it ranks:** Strong for larger estates and clients who want a more “family-office” feel.
- 

## 8. Mercer Advisors – Jacksonville office

- **Approx AUM (firmwide):** ~\$270B+ (Jacksonville subset modest).
  - **Custody options:** Full custodial access via national platform (Schwab, Fidelity, etc.).
  - **Planning & wealth focus:** Comprehensive family-office-style planning (tax, estate, retirement, and business-transition).
  - **Insurance & RSU/PSU:** Strong insurance and **RSU/PSU/stock option capabilities**, especially for local employers like CSX, J&J, and other large employers.
  - **Why it ranks:** Best if you want a national-brand platform with robust RSU/PSU and executive-planning services.
- 

## 9. Jax Wealth Advisors

- **Approx AUM:** Not publicly itemized; mid-size local firm.
  - **Custody options:** Standard custodial platforms.
  - **Planning & wealth focus:** Holistic planning plus portfolio management.
  - **Insurance & RSU/PSU:** Light insurance integration; some RSU/PSU for local-sleeve clients.
  - **Why it ranks:** Strong local reputation and good for Jacksonville-based professionals seeking a mid-tier firm.
- 

## 10. Paragon Wealth Strategies (Jacksonville-focused)

- **Approx AUM:** Not publicly itemized; moderate-size firm.
  - **Custody options:** Standard custodial platforms.
  - **Planning & wealth focus:** Planning-heavy, especially for retirees and pre-retirees.
  - **Insurance & RSU/PSU:** Insurance and some RSU-style work; not as heavily branded.
  - **Why it ranks:** Solid “planner-first” option for conservative, retirement-focused clients.
-

## Appendix: Perplexity.ai How We Ranked

- **Metrics weighted hierarchy:**
    1. **AUM and firm scale** (larger, more-established firms favored).
    2. **Planning depth** (holistic, recurring planning scores higher than single-meetings).
    3. **Custody options** (multiple, independent custodians favored over proprietary platforms).
    4. **Insurance & RSU/PSU** (explicit RSU/PSU and insurance integration scored higher).
  - **Disclaimer:**

This is a **general informational summary** and not a recommendation. AUM figures are approximate and may change over time. Please confirm custody arrangements, fee structures, and RSU/PSU capabilities directly with each firm before engaging.
  - **Perplexity.ai ran multiple analysis to create this report**
-