

# **UHNW Wealth Advisory Landscape Report Northeast Florida (Jacksonville / Ponte Vedra / Beaches) Prepared: April 2026**

## **Executive Summary**

The Northeast Florida wealth management market is undergoing a structural shift. Historically dominated by institutional RIAs and family-office platforms, the market is increasingly influenced by high-trust boutique firms winning UHNW relationships.

- Client preference for custody flexibility
- Minimal disruption of assets
- Relationship-first advisory models

As a result, firms such as InVestra Financial are now competing directly for \$25M+ households despite non-traditional institutional structures.

## **Tier 1: Active UHNW Competitors**

### ***Callan Family Office (Jacksonville)***

Model: Multi-Family Office | Client Profile: \$25M–\$500M+

- Integrated investment, tax, and estate coordination
- Multi-generational governance
- Institutional portfolio construction

### ***Mercer Advisors***

Model: National RIA / Family Office Platform | Client Profile: \$5M–\$100M+

- In-house tax and estate planning
- Integrated portfolio + financial planning
- Scalable UHNW infrastructure

### ***Creative Planning***

Model: National Independent RIA | Client Profile: \$2M–\$100M+

- Tax-led planning model
- Estate and retirement integration
- Broad investment platform

### ***Timucuan Asset Management***

Model: Investment-Centric Boutique | Client Profile: \$5M–\$100M+

- Direct equity portfolio management
- Institutional-style investment discipline

- Long-term capital appreciation focus

### ***InVestra Financial***

Model: Hybrid RIA (Independent Advisor Alliance + LPL Financial) | Client Profile: \$5M–\$25M+ (expanding into UHNW)

- Advanced planning (exit, legacy, multi-generational)
- Multi-custodian flexibility (Schwab, Fidelity, Pershing)
- Relationship-driven advisory model
- Low-friction onboarding with asset continuity

### **Tier 2: Established HNW → UHNW Advisors**

- Waverly Advisors – Fee-only fiduciary, strong planning discipline
- Ullmann Wealth Partners – Boutique personalized advisory
- Correct Capital Wealth Management – Planning-focused model

### **Tier 3: Core HNW Advisory Firms**

- Jacksonville Wealth Management
- Taras Wealth (Raymond James)

## **Market Insights**

### ***Asset Continuity Preference***

UHNW clients prioritize maintaining custody relationships and minimizing disruption.

### ***Emerging Advisory Model***

Advisors increasingly maintain existing custody while layering planning and strategy.

### ***Jacksonville Market Dynamics***

Jacksonville remains a transitional UHNW market with growing boutique influence.

## **Strategic Takeaways**

- Institutional infrastructure: Callan, Mercer, Creative Planning
- Investment-centric: Timucuan
- Relationship-driven: InVestra
- Balanced fiduciary: Waverly, Ullmann, Correct Capital