



# Advance Capital Management Named to CNBC's 2025 Financial Advisor 100 List

*Advance Capital Management is proud to announce it has been named to CNBC's seventh annual Financial Advisor 100 list.*

SOUTHFIELD, MI, UNITED STATES, October 3, 2025 /EINPresswire.com/ -- Advance Capital Management is proud to announce it has been named to CNBC's seventh annual [Financial Advisor 100 list](#), a ranking of the registered investment advisory (RIA) firms that guide clients through the complexities of today's financial landscape with a commitment to personalized, independent advice.

"We're honored to be recognized by CNBC as one of the top 100 financial advisory firms in the country," said Joe Theisen, CEO of Advance Capital Management. "This achievement is a reflection of our team's dedication to helping our clients pursue the financial future they've worked so hard for."

CNBC's FA 100 list – compiled in partnership with data provider AccuPoint Solutions – analyzes a range of core data points from over 40,000 SEC-registered RIA firms. The evaluation considers key criteria, such as years in business, number of accounts, compliance record and client experience. No form of compensation is provided for inclusion on the list.

With over four decades of experience and a client-first philosophy, Advance Capital Management is a fee-only adviser that provides comprehensive financial planning and investment management services to clients across the country.

Whether it's planning for retirement, investing with purpose or creating a tax-efficient income plan, Advance Capital Management helps individuals and families make informed financial decisions. With a collaborative, team-based approach, the firm provides guidance that's tailored to each client's life and goals.

## About Advance Capital Management

Founded in 1986, Advance Capital Management is an independent Registered Investment Adviser that serves more than 6,000 clients and manages over \$4 billion in assets.

Headquartered in Southfield, MI, the firm also has offices in Grand Rapids, MI; Independence, OH; Lisle, IL; and Dallas, TX. Advance Capital offers financial planning, retirement income strategies, investment management and related services to clients nationwide.

Third-party rankings and recognitions are no guarantee of future investment outcomes and do not ensure that a client or prospective client will experience a higher level of performance or results. CNBC's 2025 Financial Advisor 100 ranking awarded Oct. 1, 2025, for period 10/1/24 – 10/1/25. No compensation was given for this award.

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