

Advance Capital Management Named to Forbes' 2025 List of America's Top RIA Firms

Advance Capital Management is pleased to announce its inclusion in the fourth annual Forbes Top RIA Firms list.

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Advance Capital Management is
pleased to announce its inclusion in
the fourth annual [Forbes Top RIA Firms
list](#), recognizing the nation's leading registered investment advisory firms.



"We're deeply honored to be named among the top RIA firms in the country by Forbes," said Joe Theisen, CEO of Advance Capital Management. "This recognition reflects the support of our clients, and we're truly grateful for the opportunity to help guide their financial lives."

The Forbes Top RIA Firms list is developed by SHOOK Research, based on a rigorous algorithm that incorporates both qualitative and quantitative factors. Evaluation criteria include in-depth interviews, industry experience, revenue trends, assets under management, compliance records, and each firm's approach to serving clients. Forbes data compiled by SHOOK Research LLC based on time period from 3/31/24 – 3/31/25. No fees or compensation are exchanged for inclusion on the list.

Whether it's planning for retirement, investing with purpose or creating a tax-efficient income strategy, Advance Capital Management helps individuals and families make informed financial decisions. With a collaborative, team-based approach, the firm provides guidance 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 across the country.

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. Forbes (Awarded Oct. 2025) data compiled by SHOOK Research LLC based on time period from 3/31/24 – 3/31/25. No compensation was given for this award.

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