

Coastal Bridge Advisors Named Forbes 'Top RIA Firms' for 2025

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WESTPORT, CT, UNITED STATES, October 17, 2025 /EINPresswire.com/ -- Coastal Bridge Advisors is thrilled to announce its inclusion on the prestigious Forbes "Top RIA Firms" in America for 2025. This recognition acknowledges the nation's top independent RIA (Registered Investment Advisors) that consistently strives to provide excellence in client service, industry experience, and growth.



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"We are incredibly honored to be named among the 'Top RIA firms in America' according to Forbes Magazine," said Mark Dupont, President. "This recognition reflects our team's commitment to excellence and client satisfaction. As a fiduciary, we take pride in delivering transparent, personalized financial guidance that seeks to provide individuals and families with lasting peace of mind."

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The recognition comes after an extensive nomination and review process, with over 50,000 nominations submitted for consideration. Coastal Bridge Advisors' placement of 39 out of the 250 selected RIAs underscores the firm's dedication to delivering personalized financial advice,

exceptional client service, and a fiduciary approach that puts clients' interests first.

The Forbes Top RIA Firms 2025 ranking, which is independently determined by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone, virtual and in-person due diligence interviews, and quantitative data as of 6/30/2025. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience

and those that encompass best practices and approach to working with clients. Rankings are based on the opinions of SHOOK Research, LLC and are not indicative of future performance or representative of any one client's experience. Neither Forbes nor SHOOK receive a fee in exchange for rankings. For a comprehensive explanation, please see the complete methodology here. <https://www.forbes.com/sites/rjshook/2025/10/01/methodology-americas-top-ria-firms-2025/>

About Coastal Bridge Advisors: Coastal Bridge Advisors is an independent registered [investment advisory firm](#) with offices in Westport and Milford, CT; Charlotte, NC; and Los Angeles, CA. Founded in 2008, the firm was established with the aim of providing better client service, personalized and sophisticated guidance, as well as coordinated advice delivery. The firm strives to help its clients to more clearly plan for retirement and more simply transfer wealth to future generations so they may more effortlessly enjoy the lifestyle they want today. For information regarding the firm, please visit www.coastalbridgeadvisors.com.

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