Avion Wealth Named to Financial Advisor Magazine's 2026 RIA Ranking

Avion Wealth, LLC has been named to Financial Advisor magazine's 2026 RIA Ranking, based on firm data self-reported to the publication.

THE WOODLANDS, TX, UNITED STATES, August 10, 2026 /EINPresswire.com/ -- Avion Wealth, LLC, an SEC-registered investment adviser serving C-suite executives, airline captains, business owners, and high-net-worth families, has been named to Financial Advisor magazine's 2026 RIA Ranking, an annual national list of registered investment advisory firms.

The annual ranking recognizes registered investment advisers based on self-reported firm data submitted to Financial Advisor magazine, including discretionary and non-discretionary assets under management as of December 31, 2025. Avion Wealth reported $971,851,058 in assets under management as of that date.

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Paul J. Carroll, CFP®

"Recognition of this kind reflects the discipline of a team that treats every detail as consequential," said Paul J. Carroll, CFP®, Founder and Chief Executive Officer of Avion Wealth. "Our work is measured in the confidence our clients feel about their decisions, not in a list position."

The firm's client base concentrates in two groups whose compensation structures carry unusual complexity. Senior executives hold equity compensation, deferred compensation, and concentrated stock positions that intersect with tax and estate decisions across multiple years. Airline captains approach a career with a defined regulatory endpoint, facing pension elections, rollover decisions, and Social Security timing questions that are difficult to revisit once elected. Carroll addressed the second group at book length in The United Pilot's Flight Plan for Wealth, now in its second edition.

Avion Wealth serves clients through the Avion Wealth Formula: Wealth Management = Investment Consulting + Advanced Planning + Relationship Management. The Wealth Confidence Plan™ process begins with a Discovery Meeting designed to establish a clear understanding of a client's goals, values, and financial complexity before any recommendation is made.

About Avion Wealth, LLC

Avion Wealth, LLC is an independent, SEC-registered investment adviser headquartered in The Woodlands, Texas (CRD 134242). The firm acts as a fiduciary to its advisory clients and serves C-suite executives, airline captains, business owners, and high-net-worth families under the tagline Confidence In Every Last Detail. Additional information is available at avionwealth.com and in the firm's Form ADV Part 2A.

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