

Colter Lewis Ranked in Forbes Top RIA Firms 2025

We are proud to announce that Colter Lewis Investment Partners has been named to the [Forbes America's Top RIA Firms 2025](#) list. This recognition reflects our commitment to guiding families of meaningful wealth with clarity, purpose, and partnership. We are honored to be acknowledged among leading Registered Investment Advisors ("RIAs") across the country.

To compile the list of the top 250 RIAs in the country, Forbes hired SHOOK Research to analyze and compare the 50,063 nominations they received. Of the 28,522 RIAs that qualified and were invited to complete a survey, Colter Lewis was ranked in the top 1%.

For further information on Forbes' methodology, please [click here](#).

About the Forbes Top RIA Firms List

The Forbes ranking of America's Top RIA Firms is conducted in partnership with SHOOK Research. The goal of the ranking is to identify firms that demonstrate exceptional client service, strong compliance records, and long-term commitment to fiduciary excellence. Data provided by SHOOK® Research, LLC — Data as of 3/31/25. Source: Forbes.com (October, 2025). Forbes America's Top RIA Firm's ranking was developed by SHOOK Research. RIA Firm refers to those that are registered directly through the SEC as a registered investment advisor, those that file their form ADV within a corporate umbrella, or recognized practice groups associated with such a firm under a corporate umbrella. Rankings are based on in-person, virtual and telephone due diligence meetings and a ranking algorithm that includes: a measure of each firm's best practices, client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. SHOOK's research and rankings provide opinions intended to help investors choose the right financial advisor and firm, and are not indicative of future performance or representative of any one client's experience. Past performance is not an indication of future results. Neither Forbes nor SHOOK Research receive compensation in exchange for placement on the ranking. For more information, please see www.SHOOKresearch.com. SHOOK is a registered trademark of SHOOK Research, LLC.

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