Gregory

AI Search POWER PLAYERS

The RIAs AI Recommends for Niche Audiences

A Gregory study of **8,389 AI answers** reveals which RIAs get recommended, which get overlooked, and what the top firms do right.

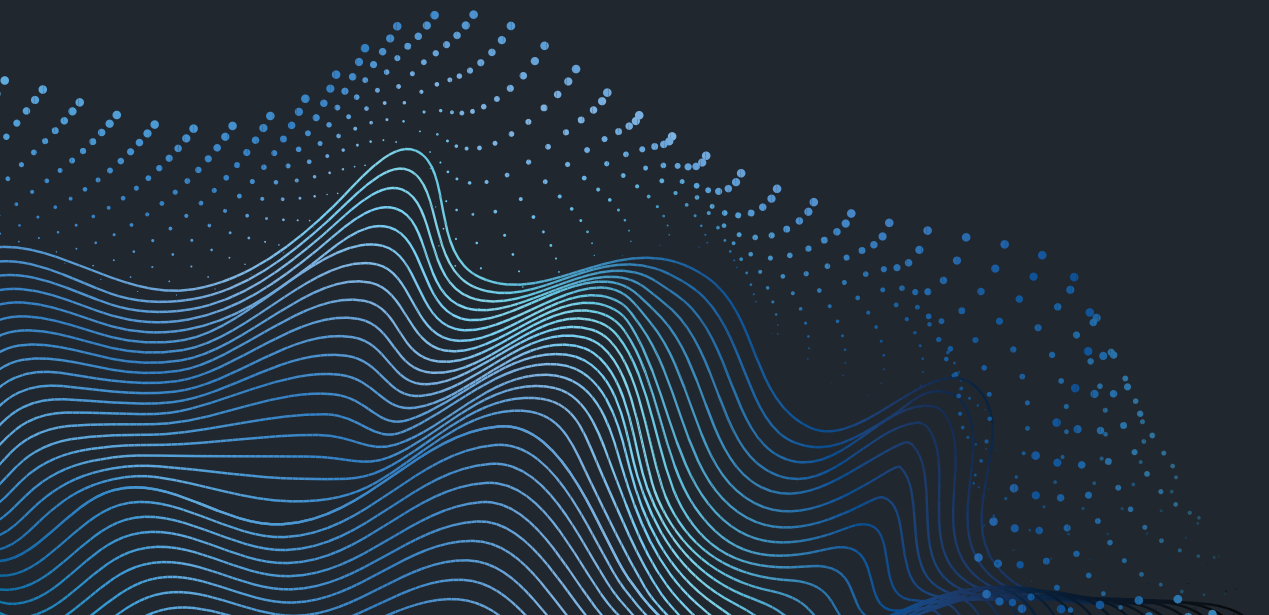


Introduction

Wealthy professionals now ask AI assistants which financial advisor to call. A physician asks for help with student loans, a musician asks about a catalog sale, and a tech employee asks about company stock. The firms named in those answers make the first shortlist before anyone visits a website.

To see who those answers favor, Gregory wrote 248 prompts in the words eight audiences use when they look for financial help. The audiences are professional athletes, attorneys, business owners, dentists, entertainers, media executives, physicians, and tech employees. The result is 8,389 answers naming 3,149 advisory firms and teams, 2,748 of them independent RIAs.

This report shows which independent RIAs the answers name most often, how positively the answers describe them, which sources the models cite, and what the most-named firms have in common.



84%

of the firms on CNBC's 2026 Financial Advisor 100 never appear in these answers.

1%

Only 10 firms in Barron's Top 100 RIAs are mentioned more than 1% of the time.

3

RIAs dominate AI recommendations.

Niche

Niche specialists beat national giants for their audience.

Executive summary

01

Rankings do not guarantee AI visibility. Of CNBC's 2026 Financial Advisor 100, 84 firms never appear in these answers. Of Barron's 2026 Top 100 RIAs, 22 never appear, and only 10 have a mention rate above 1%. LPL Financial, Barron's No. 1 Mega RIA, appears in 0.4% of answers and is never framed positively.

02

Three national RIAs set the baseline. Mercer Advisors appears in 26.6% of all answers, Creative Planning in 18.1%, and Mariner Wealth Advisors in 15.4%. Dentist Advisors is next at 7.0%.

03

Specialists lead when the question matches their niche. Dentist Advisors ranks fourth among RIAs on dentist answers alone.

04

Results vary widely by question, even within one audience. Fee-only and flat-fee prompts often go to specialists, and city prompts go to local firms.

05

AI recommends 86% of RIAs it names, but only praises 30%. Answers recommend 86% of the RIAs they name, frame 30% of those mentions positively, and frame almost none negatively. Among RIAs named in 200 or more answers, Cerity Partners (52%), Dental Wealth Partners (46%), and CAPTRUST (46%) get the most positive framing. ChatGPT frames 52% of advisor mentions positively, Gemini 26%, and Google AI Overviews 15%, so a firm's mix of models moves its score.

06

Firm websites are the most cited source. At least one firm website appears among the sources of 90% of answers. Directories and listing sites appear in 25%, business and financial media in 24%, social, video, and podcast sources in 14%, niche blogs and communities in 9%, and associations, unions, and credential bodies in 8%.

Overall results

The Overall Top 10: 3 national RIAs dominate, specialists break through

Breadth wins the overall list. Seven of the top 10 RIAs appear across most of the eight audiences. SLP Wealth, WealthKeel, and Dentist Advisors make it on the strength of just one to three audiences.

15%+

Mercer Advisors, Creative Planning, and Mariner Wealth Advisors each appear in 15% or more of all answers. The next RIA, Dentist Advisors, appears in 7%.

Rank	RIA	Mention rate	Positive share
1	Mercer Advisors	26.6%	28%
2	Creative Planning	18.1%	26%
3	Mariner Wealth Advisors	15.4%	26%
4	Dentist Advisors	7.0%	45%
5	Wealthspire Advisors	6.5%	23%
6	EP Wealth Advisors	5.8%	24%
7	WealthKeel	5.5%	37%
8	Cresset	5.4%	44%
9	SLP Wealth	5.4%	28%
10	Cerity Partners	4.9%	52%

Mention rate is the share of all 8,389 answers that name the firm. Positive share is the share of the firm's own mentions that frame it favorably, as a top pick, a fit for the person asking, or with praise or recognition.

Overall Top Sources Influencing AI Answers

Answers can cite more than one type of source, so the shares add up to more than 100%. Media citations split into two main kinds. Rankings, lists, and reviews appear in 23.0% of answers, and editorial coverage, such as news, features, and advice articles, appears in 17.0%. These two figures cover all news, trade, and audience media, including niche blogs, so they overlap with more than one source type.

90%

At least one firm website appears among the sources of 90% of answers.

Source type	Share of answers citing it
Firm websites	89.5%
Directories and listing sites	24.5%
Business and financial media	24.0%
Social, video, and podcasts	13.8%
Niche blogs and communities	8.9%
Associations, unions, and credential bodies	7.8%
Government and regulators	4.8%
Press release wires	1.8%

Firm websites include banks and brokerages. Sources classified as other (27% of answers) and reference sites (1%) are not shown.



How Media Coverage Can Influence AI Search Visibility

The right media coverage can give companies a boost in mentions when cited.

Wealthspire

Wealthspire: Athlete answers name Wealthspire 84% of the time when either of two stories on Wealthspire's sports launch is cited. It only shows up 9% of the time when those stories aren't cited.

CARSON WEALTH

Carson Wealth and Creative Planning: Business owner answers that cite WSJ Buy Side name Carson Wealth 2.6 times as often and Creative Planning 2.4 times as often as answers that don't. Answers that cite Buy Side's review of Carson name the firm 41% of the time, against 8% without it.

Singer Burke

Singer Burke: Every media executive answer that cites the Los Angeles Times profile of Richard Singer names Singer Burke. About half of comparable answers without that citation do.



Being a Top-Ranked RIA Doesn't Mean AI Will Recommend You

CNBC's 2026 Financial Advisor 100 and Barron's 2026 Top 100 RIA and Mega RIA lists are the industry's best-known rankings. We matched every ranked firm against the 8,389 answers. The comparison shows whether the firms these rankings reward also appear when AI answers niche questions.

Most CNBC-ranked firms never appear. Of the 100 firms on CNBC's list, 84 are never named. The other 16 together appear in about half a percent of answers, and none of CNBC's top 10 appears. Burney Wealth Management, part of No. 34 The Burney Company, is the only ranked firm named in more than 0.1% of answers.

Barron's ranks track AI visibility more closely. Of Barron's Top 100 RIAs, 78 are named at least once, and 22 never appear. A ranked firm is credited with its own wealth brand, so NewEdge Wealth counts toward NewEdge Capital Group and Carson Wealth toward Carson Group.

Most of those 78 firms are named rarely. Four have a mention rate of 5% or more, led by Mercer Advisors at 26.6%, Wealthspire at 6.5%, EP Wealth Advisors at 5.8%, and Cresset at 5.4%. Six have a mention rate between 1% and 5%. Twenty-seven fall between 0.1% and 1%, and the other 41 fall below 0.1%, or fewer than 1 in every 1,000 answers.

The top of the Barron's list takes most of the attention. Barron's top 10 firms account for 69% of all mentions of the list's firms, and No. 1 Mercer Advisors accounts for 39% alone. One of the top 10, Private Advisor Group, is never named.

Scale alone does not win. All nine Barron's Mega RIAs appear, and seven appear in more than 1% of answers. LPL Financial, Mega No. 1, appears in 0.4% of answers and is never framed positively. Edelman Financial Engines, Mega No. 3, appears in 0.5%.

When a ranking page is cited, the firm on it is usually named. Every answer that cites Barron's Advisor Finder profile of Creative Planning names the firm, against 32% for runs of the same prompts without it. CNBC.com is cited in 0.6% of answers, and its profile pages for individual ranked firms are almost never cited.

Many ranked firms don't appear in answers to these questions. The ranked firms that show up most also publish pages for specific audiences, and they appear on the lists and directories the models cite for each audience.

69% Barron's top 10 firms account for 69% of all mentions of the list's firms.

Five ways the most-named firms win AI recommendations

The most-named firms outside the national group share a few patterns that make them more visible.

01

Answer your audience's questions. Mercer's page for dentists is cited in 41.0% of dentist answers, Mission Wealth's page for tech professionals in 20.3% of tech answers, and Wealthspire's page for attorneys in 16.8% of attorney answers. Specialists that own a prompt often have a page that answers that question.

02

Get listed where AI looks. That means the WSJ's advisor rankings, Wealthtender, The White Coat Investor, Dentist Decoded, and the community sites and directories for each audience. Answers that cite these lists name the firms on them more often.

03

Make your firm the main story in media coverage. That means a launch, a new practice, a hire, or a profile with the firm's name in the headline. In the 30 articles we read, a firm that was the subject of a story was named far more often when the story was cited than a firm quoted alongside others.

04

Publish your fees. On 2 of 12 fee prompts, the leading firm's pricing page appeared in most answers that named it, 94% for Concert Financial Planning and 65% for Level Wealth Management.

05

Focus on your local markets. Independent firms outside the national group lead nine of the 10 city prompts for business owners and physicians. The exception is New York's business owner prompt, which goes to Wealthspire Advisors at 45%.

What to do next

4

Number of top 100 RIAs with a mention rate above 5%. The rest are mostly or entirely invisible.

If your firm is missing from AI answers, or you don't like how the answers describe you, start with an AI search audit to understand the gaps and opportunities.

Gregory runs the questions your prospects ask through up to 7 AI models and analyzes the answers using Gregory Influence Engine, our AI search measurement tool. The audit shows where your firm appears, how the answers characterize you, which competitors they name instead, and which sources they rely on.

From there, Gregory builds the plan. That can include new or refreshed web pages that better answer an audience's questions, placements on the lists and directories the models cite, news coverage with your firm at the center of the story, and ongoing tracking in Gregory Influence Engine to show what changes.

To start with an audit, visit **gregoryagency.com/contact**.

League-specific expertise wins

National RIAs with pages built for athletes lead the list, and smaller firms break in by owning one league or NIL money.

Top 10 RIAs

	RIA	Mention rate	Positive share
1	Mercer Advisors	34.2%	20%
2	EP Wealth Advisors	25.5%	17%
3	Mariner Wealth Advisors	22.7%	19%
4	Cresset	14.6%	46%
5	CAPTRUST	14.4%	34%
6	Creative Planning	10.8%	23%
7	AWM Capital	9.7%	35%
8	Arden Hill Partners	8.0%	29%
9	Wealthspire Advisors	7.6%	19%
10	Cerity Partners	7.3%	58%

Top sources

Source type	Share of answers citing it
Firm websites	92.8%
Directories and listing sites	15.8%
Business and financial media	28.6%
Social, video, and podcasts	17.7%
Niche blogs and communities	0.0%
Associations, unions, and credential bodies	14.6%
Government and regulators	6.8%
Press release wires	3.5%

Takeaways

Athlete pages are cited alongside the leaders. Mercer's page for professional athletes is cited in 31.9% of athlete answers, EP Wealth's in 21.6%, Mariner's in 19.5%, Cresset's in 11.1%, and CAPTRUST's in 9.7%.

League names change the winner. The Hockey Wealth Group leads NHL answers at 85%, Cresset appears in 67% of WNBA answers, and EP Wealth Advisors leads college NIL answers at 56%.

Trade coverage of sports practices goes with more mentions. Wealth-industry trade press, one part of the business and financial media in the top sources chart, appears in 14.5% of athlete answers, the most of any audience. Of athlete answers that cite either of two stories on Wealthspire's sports launch, 84% name Wealthspire. Answers without those stories only name it 9% of the time.

Cerity Partners (58%) and Cresset (46%) get the most positive framing in the athlete top 10.

Smaller firms that lead athlete prompts tend to have a page built for one league, NIL money, or a short career, and trade coverage of that practice.

85% The Hockey Wealth Group appears in 85% of NHL answers.

Career stage shapes advisor picks

Attorney answers turn on career stage, which lets specialists that own one stage or one fee model stand alongside the national RIAs.

Top 10 RIAs

	RIA	Mention rate	Positive share
1	Wealthspire Advisors	24.3%	26%
2	Mercer Advisors	15.9%	43%
3	SLP Wealth	14.9%	31%
4	Firefly Wealth Management	14.8%	42%
5	Concert Financial Planning	14.3%	38%
6	Creative Planning	13.3%	36%
7	Mariner Wealth Advisors	12.1%	33%
8	Power Forward Group	10.9%	4%
9	The Lawyer Millionaire	9.2%	25%
10	Cerity Partners	7.4%	36%

Top sources

Source type	Share of answers citing it
Firm websites	89.1%
Directories and listing sites	35.4%
Business and financial media	21.5%
Social, video, and podcasts	11.0%
Niche blogs and communities	5.0%
Associations, unions, and credential bodies	10.4%
Government and regulators	4.5%
Press release wires	1.1%

97% Concert Financial Planning appears in 97% of answers about flat-fee planners for BigLaw attorneys.

Takeaways

Career stage picks the firm. Lawyers starting their own firm get The Lawyer Millionaire (81% of answers), and solo attorneys get Wealthspire Advisors (71%).

Student loans and flat fees belong to specialists. SLP Wealth appears in 88% of answers on the Public Service Loan Forgiveness prompt and 81% on the prompt about paying off student loans. Concert Financial Planning appears in 97% of answers about flat-fee planners for BigLaw attorneys.

Wealthtender's directory travels with the specialist picks. Wealthtender is cited in 13% of attorney answers, most often for its page of financial advisors for attorneys, which features Q&As with attorney-focused advisors and a directory of advisors who serve lawyers. Firefly Wealth Management has a Wealthtender profile built around attorneys. Answers that cite Wealthtender name Firefly 3.5 times as often as runs of the same prompts that don't (48% vs. 14%).

Wealthspire's page for attorneys is cited in 16.8% of attorney answers, and Wealthspire tops the attorney list.

Being named often and being described positively are separate results. Power Forward Group ranks eighth on mentions and is framed positively in only 4% of them (it's mostly described neutrally).

03 / BUSINESS OWNERS

Local and fee questions open the field

Business owner answers default to three national RIAs unless the question names a city or a flat fee.

Top 10 RIAs

	RIA	Mention rate	Positive share
1	Mercer Advisors	26.9%	36%
2	Creative Planning	23.7%	38%
3	Mariner Wealth Advisors	18.9%	40%
4	Wealth Enhancement Group	8.1%	38%
5	EP Wealth Advisors	7.5%	28%
6	CAPTRUST	7.3%	67%
7	Cerity Partners	6.0%	52%
8	Darrow Wealth Management	4.9%	12%
9	Carson Wealth	4.7%	22%
10	Wealthspire Advisors	3.4%	50%

Top sources

Source type	Share of answers citing it
Firm websites	86.3%
Directories and listing sites	32.2%
Business and financial media	26.9%
Social, video, and podcasts	13.2%
Niche blogs and communities	0.0%
Associations, unions, and credential bodies	8.4%
Government and regulators	3.9%
Press release wires	1.2%

Takeaways

Fee wording breaks the pattern. Level Wealth Management appears in 47% of answers on the flat-fee prompt.

City prompts go to local firms. Melby Wealth Management appears in 74% of Nashville answers, Mendoza Private Wealth in 58% of Miami answers, and Goodman Financial in 59% of Houston answers.

Gemini sticks to the national names, naming Mercer Advisors in 38% of business owner answers and Creative Planning in 34%. ChatGPT spreads its picks across nearly three times as many firms.

WSJ citations go with more mentions for specific firms. The WSJ is cited in 17% of business owner answers. Answers that cite it name Carson Wealth 2.6 times as often (20% vs. 8%) and Creative Planning 2.4 times as often (34% vs. 14%) as runs of the same prompts that don't.

CAPTRUST (67%) and Cerity Partners (52%) get the most positive framing in the business owner top 10.

74% Melby Wealth Management appears in 74% of Nashville answers.

Specialists outshine national giants

Dentists are the specialists' strongest audience. Dental specialists hold three of the top five spots.

Top 10 RIAs

	RIA	Mention rate	Positive share
1	Dentist Advisors	57.2%	45%
2	Mercer Advisors	46.9%	26%
3	Dental Wealth Partners	37.1%	46%
4	Mariner Wealth Advisors	21.9%	18%
5	Engage Advisors	21.2%	25%
6	Arch Financial Planning	18.8%	23%
7	SLP Wealth	18.3%	30%
8	Core Advisors	17.3%	30%
9	Creative Planning	16.6%	13%
10	Cain Watters & Associates	15.7%	42%

Top sources

Source type	Share of answers citing it
Firm websites	93.0%
Directories and listing sites	28.2%
Business and financial media	13.7%
Social, video, and podcasts	13.8%
Niche blogs and communities	10.2%
Associations, unions, and credential bodies	8.9%
Government and regulators	3.5%
Press release wires	0.4%

57% Dentist Advisors appears in 57% of dentist answers, the highest rate for any RIA in any single audience.

Takeaways

Dentist Advisors owns the top slot. It appears in 57% of dentist answers and is described positively in 45% of them.

Mercer's page for dentists is cited in 41% of dentist answers, and Mercer leads the practice-sale prompt at 74%.

Sub-specialties have their own winners. Legend Financial Advisors leads oral surgeon answers at 68%, Cain Watters & Associates narrowly leads the DSO prompt at 36% to Dentist Advisors' 31%, and Fortitude Financial Planning leads the flat-fee prompt at 63%.

Each model crowns a different specialist. ChatGPT leads with Dental Wealth Partners (73%), Gemini with Mercer Advisors (76%), and Google AI Overviews with Dentist Advisors (73%).

Engage Advisors, new to the top 10, gets most of its dentist mentions from Gemini, which names it in 42% of its dentist answers.

Dentist Decoded citations go with more mentions for Cain Watters. Answers that cite Dentist Decoded name Cain Watters & Associates 55% of the time, against 24% for runs of the same prompts that don't.

05 / ENTERTAINERS

Firms that know the craft lead the list

Entertainer answers favor RIAs that serve one craft or one industry, and only three national RIAs make the top 10.

Top 10 RIAs

	RIA	Mention rate	Positive share
1	Artisan Financial Planning	17.7%	35%
2	Creative Planning	15.9%	18%
3	WellAcre Global Wealth Advisors	12.9%	11%
4	Infinitus Wealth Management	10.1%	27%
5	Ivory Wealth Management	7.9%	11%
6	Navalign Wealth Partners	7.0%	21%
7	Cresset	6.8%	24%
8 (tie)	AMA Financial Advisors	5.5%	38%
8 (tie)	Wealthspire Advisors	5.5%	11%
10	Fade In Financial	5.0%	53%

Top sources

Source type	Share of answers citing it
Firm websites	91.6%
Directories and listing sites	20.2%
Business and financial media	21.6%
Social, video, and podcasts	13.4%
Niche blogs and communities	0.0%
Associations, unions, and credential bodies	3.8%
Government and regulators	5.2%
Press release wires	2.6%

Takeaways

Craft and income type pick the winner. Artisan Financial Planning leads musician answers at 88% and fee-only answers at 92%. Infinitus Wealth Management leads answers about investing after a catalog sale at 83%.

Craft pages are cited alongside the leaders. WellAcre's page for the entertainment and film industry is cited in 12.7% of entertainer answers, Artisan's site in 12.2%, and Ivory Wealth Management's page for musicians and artists in 7.6%.

RIAs face one of the most crowded fields in the study. They take 41% of advisor mentions, and business managers and banks take most of the rest.

Several leading RIAs get cool framing. WellAcre and Ivory Wealth Management are each framed positively in only 11% of their mentions. Fade In Financial gets the warmest framing in this top 10, at 53%.

88% Artisan Financial Planning appears in 88% of musician answers.

The toughest audience for independent RIAs

Media executive answers leave independent RIAs the least room of any audience, and pages built for this audience are rarely cited.

Top 10 RIAs

	RIA	Mention rate	Positive share
1	Creative Planning	21.1%	21%
2	Mercer Advisors	17.2%	39%
3	Mariner Wealth Advisors	14.4%	24%
4	Cresset	9.9%	41%
5	Wealthspire Advisors	8.3%	15%
6	Cerity Partners	6.8%	51%
7	Singer Burke	5.3%	72%
8	EP Wealth Advisors	5.2%	29%
9	Rockefeller Capital Management	4.8%	33%
10	Corient	4.2%	36%

Top sources

Source type	Share of answers citing it
Firm websites	86.0%
Directories and listing sites	12.8%
Business and financial media	35.3%
Social, video, and podcasts	14.2%
Niche blogs and communities	0.0%
Associations, unions, and credential bodies	2.0%
Government and regulators	5.7%
Press release wires	3.7%

Takeaways

Family office wording flips the list. Hollywood Family Office leads the family office prompt at 37%, and severance questions go to Mercer Advisors at 62%.

Being the subject of a profile tracks with mentions. Every media executive answer that cites the Los Angeles Times profile of Richard Singer names Singer Burke, against about half of runs of the same prompts that don't. Singer Burke is framed positively in 72% of its mentions, the most in this top 10. Singer Burke has been part of Mercer Advisors since October 2025.

Generic executive pages are rarely cited. The most cited RIA pages here are Creative Planning's and Mercer's pages for corporate executives, and each appears in fewer than 4% of media executive answers.

38% Independent RIAs take 38% of advisor mentions in media executive answers, the lowest share of any audience.



07 / PHYSICIANS

Community sites shape AI's picks

Physician answers run on community sites, and the specialists those sites recommend lead the list.

Top 10 RIAs

	RIA	Mention rate	Positive share
1	WealthKeel	42.4%	39%
2	Wrenne Financial Planning	29.0%	23%
3	Physician Family Financial Advisors	26.7%	14%
4	Aptus Financial	25.2%	31%
5	Mercer Advisors	24.0%	22%
6	Mariner Wealth Advisors	22.5%	18%
7	White Coat Planning	20.8%	36%
8	Physician Wealth Advisors	10.9%	7%
9	SLP Wealth	10.2%	22%
10	Creative Planning	9.0%	26%

Top sources

Source type	Share of answers citing it
Firm websites	85.7%
Directories and listing sites	23.1%
Business and financial media	17.7%
Social, video, and podcasts	14.6%
Niche blogs and communities	56.0%
Associations, unions, and credential bodies	12.8%
Government and regulators	4.4%
Press release wires	0.7%

Takeaways

Four community sites set the shortlist. The White Coat Investor is cited in 37% of physician answers, Physician Side Gigs in 20%, MedMoneyGuide in 14%, and Physician on FIRE in 11%. Some of these sites list advisors who pay to appear.

The leaders' own sites appear in only about one in five of their mentions. WealthKeel's own site is cited alongside 20% of its mentions and Wrenne's alongside 21%.

Career stage and money level pick the firm. WealthKeel leads the under-$500,000 prompt at 89%, and Wrenne Financial Planning leads both prompts about new attendings.

Gemini leans on a short list. It names WealthKeel in 62% of physician answers and Physician Family Financial Advisors in 55%.

One review list travels with one firm's mentions. Answers that cite MedMoneyGuide's review name FPL Capital Management 43% of the time, against 4% for runs of the same prompts that don't.

56% Niche blogs and communities appear in 56% of physician answers, against 9% across all answers.

08 / TECH EMPLOYEES

Employer, equity, and fee questions open the door for smaller firms

Tech answers follow the question. Smaller firms win prompts that name an employer, an equity event, or a fee model, and Mercer Advisors and Creative Planning lead the audience overall.

Top 10 RIAs

	RIA	Mention rate	Positive share
1	Mercer Advisors	43.9%	26%
2	Creative Planning	34.0%	28%
3	Mission Wealth	27.2%	23%
4	Darrow Wealth Management	16.9%	34%
5	Consilio Wealth Advisors	14.5%	17%
6	Fortrove Partners	9.4%	51%
7	Mariner Wealth Advisors	9.3%	42%
8	Cerity Partners	9.0%	65%
9	KB Financial Advisors	7.8%	33%
10	Aspiriant	7.0%	32%

Top sources

Source type	Share of answers citing it
Firm websites	91.9%
Directories and listing sites	28.9%
Business and financial media	25.8%
Social, video, and podcasts	12.5%
Niche blogs and communities	0.0%
Associations, unions, and credential bodies	1.7%
Government and regulators	4.0%
Press release wires	1.1%

97%

Ad Astra Financial Planning appears in 97% of answers on the flat-fee prompt.

Takeaways

Employer names and fee wording favor smaller firms. Farther leads answers for Google employees at 89%, and Ad Astra Financial Planning leads the flat-fee prompt at 97%.

Equity events open the door. KB Financial Advisors ties Mercer Advisors on the IPO prompt at 71%.

Profession pages are cited alongside the leaders. Mercer's page for tech professionals is cited in 23.6% of tech answers. Mission Wealth's page is cited in 20.3%, and Mission Wealth ranks third among RIAs.

ChatGPT favors the equity boutiques. It names Darrow Wealth Management in 30% of tech answers.

Cerity Partners is framed positively in 65% of its tech mentions, the most in this top 10.

About the data



Prompts



Completed answers



AI platforms



Audiences

Gregory ran 248 prompts, 31 for each audience, 12 times each on ChatGPT, Gemini, and Google AI Overviews. Of the 8,928 total runs, Google returned no AI Overview for 320 of them. Of the other 8,608, 57 only asked a clarifying question and 162 were cut off before the list. That leaves 8,389 completed answers, 2,863 from ChatGPT, 2,976 from Gemini, and 2,550 from Google. Pooled figures count every completed answer equally, so each model's weight follows its number of answers.

Forty prompts name a city (Los Angeles, New York, Houston, Miami, or Nashville). The prompts are test questions Gregory wrote for this study, not a sample of real searches.

Independent RIAs exclude banks, wirehouses and their teams, CPA and business management firms, digital platforms, insurers, and units of asset managers. LPL Financial and Plante Moran Financial Advisors are included because Barron's ranks them as RIAs. Singer Burke is counted as its own brand and is part of Mercer Advisors. Gregory works with some firms mentioned in this study.

Mention rate is the share of completed answers that name a firm. Positive share is the share of a firm’s mentions that frame it favorably.

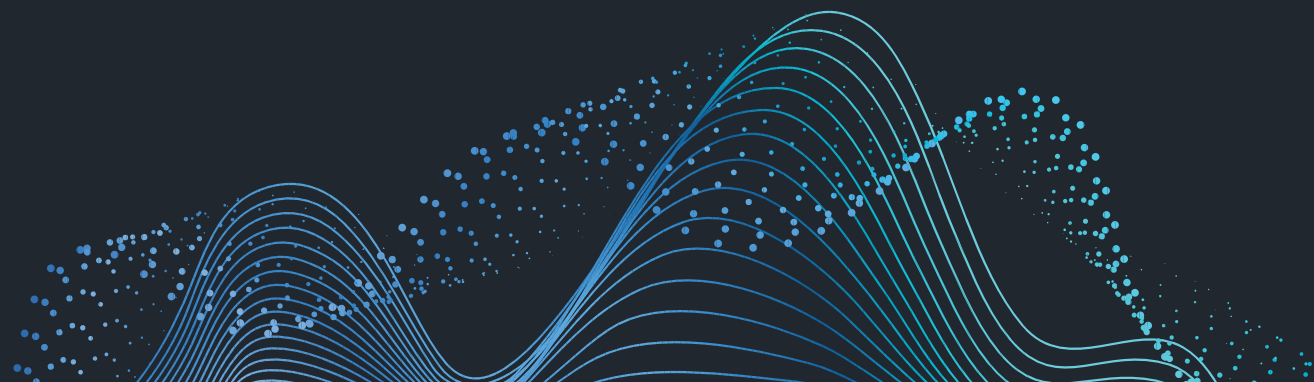
Comparisons between answers that cite a source and answers that don’t use runs of the same prompt in the same model. They show which sources and firms appear together, not that a source caused a mention. A firm that is absent from these answers may still appear in answers to other questions.

About Gregory

Gregory is an integrated communications agency founded more than 35 years ago, with more than 130 professionals in Philadelphia, New York, Boston, and London. It provides media relations, content, digital marketing, social media, creative, and AI search services, with deep experience in financial services and wealth management.

Gregory's Influence Engine tracks how ChatGPT, Gemini, Google AI Overviews, and other AI models describe a firm and its competitors. Gregory uses that data to help wealth managers and other financial firms show up, and show up well, in the answers their prospects read. Influence Engine received a 2026 InvestmentNews 5-Star award for technology and software for investment management professionals.

Learn more at **gregoryagency.com**





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