BADGLEY+PHELPS
WEALTH MANAGERS

Who We Are

Based in the Pacific Northwest, Badgley Phelps has served clients as a Registered Investment Advisory firm since 1966. We collaborate with high-net-worth individuals and families as well as corporations and foundations from across the country.

- 1,400+ client relationships
- 83 is the average number of client relationships per wealth manager
- Partner with independent trusted professionals for tax, legal, and estate work

Why Badgley Phelps

Relationship focused	We stay focused on each client's goals, offering tailored, objective advice. We anticipate needs, balance risk and reward, and build lasting, multi-generational relationships.
Intellectual leadership	Deep market knowledge, grounded in quantitative and fundamental analysis, drives our investment approach. Clients benefit from direct access to industry insights and a deeply experienced professional team.
Thoughtful	We actively manage investments, customize asset allocation with diversified portfolios, and adapt to changing market conditions.
Independent	With in-house research, portfolio management, trading, and financial planning. Our independent investment approach has guided us for over 60 years, with $7.6 billion in assets under management (as of 6/30/26).

Your Team



Wealth Manager, Financial Planner, and Associate Wealth Manager



Administrative support provides dedicated help to meet your information needs



Partner in hiring and overseeing top external providers: trustee, legal, tax, bill pay



Work directly with network of contacts in providing the best advice possible

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The Badgley Phelps Difference

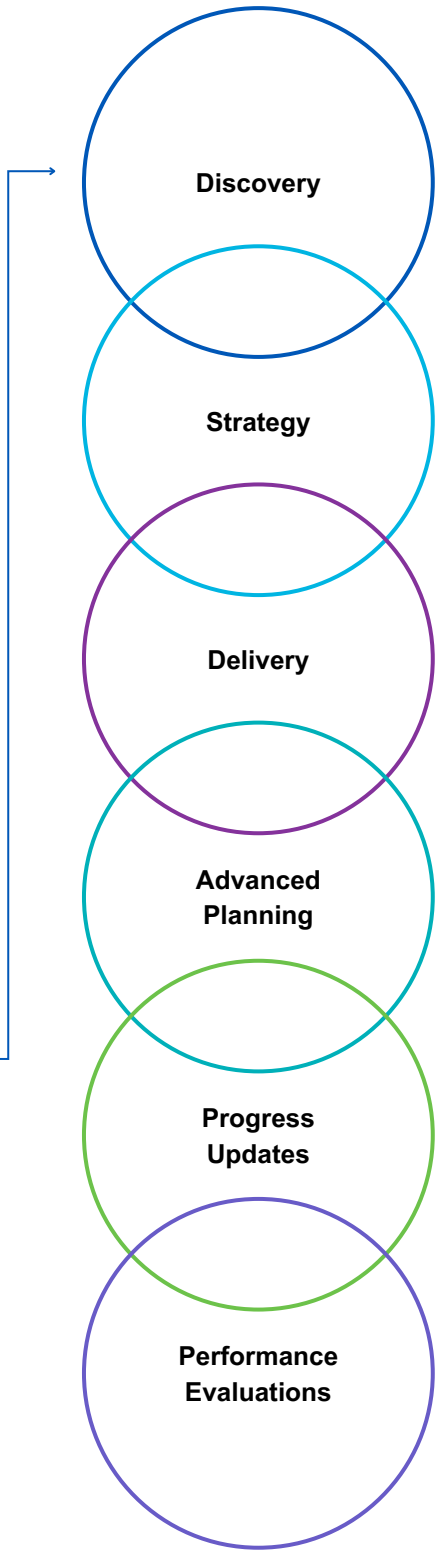
Our client investment model portfolios are built in-house with direct investments in stocks, bonds, and ETFs. We do not use a standard model list of mutual funds, which provides for greater flexibility with our clients. Our research team includes 11 members, supported by 10 CFA® charterholders, and 9 CFP® professionals, with expertise across both equity and fixed income markets.

Our Ideal Client

- Prefers to own individual securities over packaged investment products.
- Appreciates direct access to the team managing their investments, financial planning, and a dedicated client service team to help with administrative tasks.
- Values transparency and professional advice from a locally-based, independent firm.

Financial Planning Services

Our financial planning services leverage the diverse expertise of our team. We carefully craft a road map for each client, so they always know where they are in relation to their personal milestones and hurdle rates.



In addition, Badgley Phelps offers an extensive list of planning services, including but not limited to:

- Cash flow planning
- Retirement planning
- Wealth transfer planning
- Tax planning
- Philanthropic planning
- Insurance coverage review
- Social security maximization
- College planning
- Divorce planning

Minimum Investment
$1 million

Fee Schedule
First $5 million: 0.90%
Next $5 million: 0.70%
Above $10 million: 0.50%