

FA's 2008 Small-Firm Ranking

(RIAs with \$75 million or less in AUM ranked by size)

2007 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2007 ASSETS (\$MM)*	YEAR END 2006 ASSETS (\$MM)	CLIENT RELATIONSHIPS 2007	YEAR STARTED
1	Capital Wealth Management	Scottsdale, Ariz.	74.3	57.8	74	2001
2	Retirement Plus	Leawood, Kan.	73.4	60.5	278	2002
3	Laraway Financial Advisors	St. Cloud, Minn.	72.8	63.0	247	2001
4	Cornerstone Advisory	Baltimore, Md.	72.0	7.2	130	2006
5	Litchfield Nelson & Company	Naples, Fla.	71.6	59.0	117	1987
6	TandemGrowth Financial Advisors	Roswell, Ga.	70.5	59.6	122	2003
7	Werlinich Asset Management	Valhalla, N.Y.	68.6	55.9	41	1997
8	King Wealth Planning	Campbell, Calif.	68.3	63.5	212	1988
9	Bull & Bear Capital Advisors	Jacksonville, Fla.	67.7	51.1	153	1998
10	LJ Cooper Capital Management	Orem, Utah	67.4	50.8	130	2000
11	Willow Ridge Capital Advisors	Monterey, Calif.	66.9	54.5	106	2001
12	Denk Strategic Wealth Partners	Phoenix, Ariz.	66.6	63.5	171	1991
13	Williams Palmer	Kirkland, Wash.	65.0	58.0	90	2002
14	Bay City Financial Services	Bellingham, Wash.	64.7	59.8	216	1992
15	SimonDavis Asset Management	Denver, Colo.	62.2	37.0	313	2004
16	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	62.0	51.5	117	2002
17	Brookstone Capital Management	Wheaton, Ill.	62.0	11.0	800	2006
18	Finigan Financial Services	Vienna, Va.	61.7	55.0	185	2002
19	Global Equity Advisors	Providence, R.I.	61.0	28.5	321	2005
20	Scott White Advisors	Fort Myers, Fla.	60.8	67.0	17	2002
21	Apex Wealth Management Group	Oxnard, Calif.	60.0	58.0	175	2004
22	Nackers & Associates	Brookfield, Wis.	60.0	55.0	200	1992
23	Royal Capital Management	Boca Raton, Fla.	59.6	38.5	108	1997
24	Bolen Dodson & Associates	Brentwood, Tenn.	59.3	38.0	104	2003
25	The Gardner Group	Dallas, Texas	58.5	42.4	140	1994
26	Capital Asset Management	Jeffersonville, Ind.	58.0	51.8	160	2000
27	Integrated Wealth Management	Scottsdale, Ariz.	58.0	47.0	258	2000
28	Garner Financial Management	Lafayette, Calif.	58.0	52.0	92	2002
29	Conrad Capital Management	Melville, N.Y.	57.0	33.3	376	1997
30	Daniel Teplitz & Associates Financial Advisors	Old Bridge, N.J.	55.9	50.6	103	2002
31	The Personal Wealth Coach	Salado, Texas	55.2	0.0	80	2007
32	Sportsmen Dream Financial	Buffalo, Minn.	55.0	50.0	210	2000
33	Dominion Wealth Management	Reston, Va.	55.0	45.0	91	1987
34	Stonewall Asset Management	Roswell, Ga.	55.0	41.0	400	1995
35	Voso Financial Advisers	Frederick, Md.	53.5	38.9	126	1983
36	Centurion Advisory Group	Duluth, Ga.	53.0	40.0	35	2006
37	Capital Management	Greensboro, N.C.	52.7	46.2	101	1980
38	Kenfield Capital Strategies	Los Angeles, Calif.	52.1	25.5	90	2004
39	Money Professionals	Pensacola, Fla.	52.1	44.4	111	2004
40	Cypress Advisory Services	Houston, Texas	52.0	42.6	51	1993
41	Northvest	Keene, N.H.	52.0	51.0	60	1989
42	Money Plans	Silver Spring, Md.	51.0	44.9	82	1983
43	Hudson Valley Investments	Newburgh, N.Y.	50.0	40.0	125	2006
44	Cornerstone Asset Management Services	Parma, Ohio	50.0	21.5	400	2006
45	Maxim Global Wealth Advisors	Portland, Ore.	50.0	41.0	61	2005
46	CTB Financial Services	St. Louis Park, Minn.	38.5	20.0	106	1992
47	Anchor Financial Services	Savage, Minn.	38.5	31.6	134	1994
48	First Midwest Securities	Bloomington, Ill.	37.9	34.7	310	1987
49	Greenspring Wealth Management	Towson, Md.	37.8	28.5	89	2004
50	Barclay West Financial Advisors	Roseville, Calif.	36.1	25.8	64	1983

*Discretionary and nondiscretionary assets under management.

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51	Wealth Engineering	Scottsdale, Ariz.	33.6	25.6	33	2003
52	Stone House Wealth Management	Montrose, Pa.	33.0	17.0	246	2003
53	Foundations Asset Management	Anchorage, Alaska	30.0	0.0	125	2007
54	Zeller Kern Private Wealth Management	Gold River, Calif.	28.0	0.0	150	2007
55	Strategic Wealth Advisors	Syracuse, N.Y.	27.5	0.0	79	2007
56	Financial Counselors of Virginia	Portsmouth, Va.	26.5	25.0	81	1985
57	G. DeWayne McAnally	Oklahoma City, Okla.	26.0	22.5	165	1978
58	Future Quest USA	Miami, Fla.	24.0	16.0	30	2000
59	Fidelis Financial Planning	St. Peters, Mo.	21.7	18.8	37	1990
60	Smith Asset Management	Yardley, Pa.	21.0	19.0	24	1997
61	Warburton Capital Management	Tulsa, Okla.	18.0	40.1	80	1996
62	Blue Water Capital Management	San Diego, Calif.	18.0	15.0	70	2003
63	Five Rivers Financial Advisors	North East, Md.	15.0	14.0	50	1997
64	Ashwood Advisors	Atlanta, Ga.	14.8	10.2	167	2003
65	Hudson Capital Management	Waldwick, N.J.	13.6	10.5	24	2004
66	Innovative Financial	Lakewood, Colo.	13.0	5.0	30	2003
67	Gradow Capital Management	Lake Oswego, Ore.	12.2	8.8	29	2004
68	Francis Financial	New York, N.Y.	11.8	5.4	150	2002
69	Alta Cima Advisors	Cordillera, Colo.	11.5	11.0	2	2004
70	Arete Wealth Advisors	Lake in the Hills, Ill.	10.0	0.0	75	2007
71	Mark Daniel Elliott	San Diego, Calif.	10.0	8.0	16	1999
72	RG Financial Partners	Walnut Creek, Calif.	9.7	9.5	125	1986
73	Technical Analysis Investment Advisory	Tucson, Ariz.	8.9	6.2	24	2005
74	Kodiak Investment Management	Aitkin, Minn.	8.5	6.0	150	2005
75	Win Win Investment Planning	Mesa, Ariz.	6.8	6.8	323	1996
76	Atlantic Wealth Management	Lafayette, N.J.	6.2	3.2	120	2005
77	Texas Institutional Investment Management	San Antonio, Texas	4.5	4.3	8	2004
78	TSM Management Group	Gautier, Miss.	4.1	4.1	33	1992
79	Mark-Christopher	Addison, Texas	3.2	0.0	5	2007
80	Beacon Financial Advisors	Tarrytown, N.Y.	2.0	1.5	41	2000
81	Scherrer Financial Services	Downers Grove, Ill.	1.1	0.8	9	2004
82	Safety of Principle Wealth Management	Coral Springs, Fla.	0.8	0.0	4	2007
83	Holland Financial Services	Milwaukee, Wis.	0.7	0.6	25	2004

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