

# FIA

FINANCIAL ADVISOR



# RIA

## SURVEY & RANKING

# 2014

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# FA'S 2014 RIA RANKING

(By Total Assets)

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2013 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2013 ASSETS (\$MM)	% GROWTH IN ASSETS 2012-2013	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
<b>ASSET CATEGORY: \$1 BILLION AND OVER</b>							
1	Hall Capital Partners	San Francisco, Calif.	27,631.00	14.58	209.33	12.85	1.54
2	First Republic Investment Management	San Francisco, Calif.	25,990.30	28.81	4.24	3.52	24.43
3	Chevy Chase Trust	Bethesda, Md.	18,205.90	24.34	25.93	17.43	5.88
4	Moneta Group Investment Advisors	Clayton, Mo.	16,106.00	7.72	5.73	1.62	6.00
5	Silvercrest Asset Management Group	New York, N.Y.	15,700.00	40.18	32.51	14.35	22.59
6	Veritable	Newtown Square, Pa.	12,944.96	9.48	62.24	6.85	2.46
7	Oxford Financial Group	Indianapolis, Ind.	12,452.11	15.09	19.16	15.09	0.00
8	Edelman Financial Services	Fairfax, Va.	11,632.10	36.11	0.54	9.18	24.66
9	GenSpring Family Offices	Jupiter, Fla.	11,602.57	-12.22	32.50	8.69	-19.23
10	Plante Moran Financial Advisors	Southfield, Mich.	9,725.45	19.37	4.43	13.50	5.17
11	United Capital Financial Advisers	Newport Beach, Calif.	9,556.54	22.10	1.02	0.02	22.08
12	Brownson, Rehms & Foxworth	Chicago, Ill.	9,400.00	9.30	18.01	7.00	2.15
13	Creative Planning	Leawood, Kan.	9,105.36	55.54	1.34	10.46	40.80
14	The Mutual Fund Store	Overland Park, Kan.	8,780.55	23.64	0.24	16.79	5.86
15	Mariner Wealth Advisors	Leawood, Kan.	8,633.76	23.35	2.54	12.46	9.68
16	Convergent Wealth Advisors	Potomac, Md.	8,422.38	13.91	19.10	-0.56	14.55
17	Johnson Investment Counsel	Cincinnati, Ohio	8,194.63	13.27	3.01	10.81	2.22
18	Aspiriant	Los Angeles, Calif.	8,091.05	12.26	9.30	7.10	4.82
19	Ronald Blue & Co.	Roswell, Ga.	7,827.71	7.28	1.28	12.42	-4.57
20	DiMeo Schneider & Associates	Chicago, Ill.	7,460.00	22.98	24.62	16.48	5.57
21	BBR Partners	New York, N.Y.	7,347.90	11.44	79.01	5.45	5.68
22	Geneva Investment Management of Chicago	Chicago, Ill.	7,329.53	28.21	1.93	-15.65	52.00
23	Innovest Portfolio Solutions	Denver, Colo.	7,022.85	28.04	32.66	14.94	11.40
24	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	6,573.56	34.13	11.29	32.29	1.39
25	myCIO Wealth Partners	Philadelphia, Pa.	6,459.40	7.69	10.73	-0.36	8.08
26	Beacon Pointe Advisors	Newport Beach, Calif.	6,261.94	10.43	4.82	-5.46	16.80
27	Mercer Advisors	Santa Barbara, Calif.	5,345.90	37.71	1.30	17.56	17.14
28	McGladrey Wealth Management	Minneapolis, Minn.	5,090.50	19.16	1.57	16.40	2.37
29	Evercore Wealth Management	New York, N.Y.	4,874.10	7.21	9.75	7.21	0.00
30	Ballentine Partners	Waltham, Mass.	4,777.82	31.95	32.95	24.67	5.84
31	Heber Fuger Wendin	Bloomfield Hills, Mich.	4,723.19	3.76	41.07	-9.77	15.00
32	GW & Wade	Wellesley, Mass.	4,587.42	18.09	2.14	15.34	2.39
33	Tiedemann Wealth Management	New York, N.Y.	4,587.15	14.58	35.29	5.77	8.33
34	Banyan Partners	Palm Beach Gardens, Fla.	4,581.00	312.77	2.11	145.46	68.16
35	Gresham Partners	Chicago, Ill.	4,571.56	18.47	61.78	8.87	8.82
36	Clarfeld Wealth Strategist & Financial Confidantes	Tarrytown, N.Y.	4,432.00	13.58	12.66	10.34	2.94
37	Northside Capital Management	Hood River, Ore.	4,409.17	56.41	176.37	37.64	13.64
38	The Presidio Group	San Francisco, Calif.	4,049.40	13.95	28.92	18.01	-3.45
39	RMB Capital Management	Chicago, Ill.	3,977.66	28.44	3.82	18.68	8.22
40	Halbert Hargrove	Long Beach, Calif.	3,974.64	94.35	8.51	111.00	-7.89
41	Mason Investment Advisory Services	Reston, Va.	3,961.55	20.45	6.07	21.56	-0.91
42	Cornerstone Advisors Asset Management	Bethlehem, Pa.	3,947.99	-1.24	39.48	-1.24	0.00
43	Sontag Advisory	New York, N.Y.	3,911.79	8.51	3.32	9.16	-0.59
44	Tolleson Wealth Management	Dallas, Texas	3,881.27	10.96	30.32	-8.98	21.90
45	Ferguson Wellman Capital Management	Portland, Ore.	3,808.90	17.52	5.87	9.91	6.92
46	Federal Street Advisors	Boston, Mass.	3,739.28	10.57	26.71	-36.82	75.00
47	Altair Advisers	Chicago, Ill.	3,729.04	11.28	13.81	-12.21	26.76
48	Wetherby Asset Management	San Francisco, Calif.	3,700.68	9.30	7.46	14.59	4.62

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# FA'S 2014 RIA RANKING

(By Total Assets)

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2013 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2013 ASSETS (\$MM)	% GROWTH IN ASSETS 2012-2013	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
49	Savant Capital Management	Rockford, Ill.	3,605.18	23.89	1.17	14.64	8.07
50	Douglas C. Lane & Associates	New York, N.Y.	3,598.06	41.56	4.00	25.83	12.50
51	MAI Wealth Advisors	Cleveland, Ohio	3,536.51	19.45	4.53	8.44	10.16
52	Bartlett & Co.	Cincinnati, Ohio	3,519.90	13.13	4.17	12.99	0.12
53	Mill Creek Capital Advisors	Conshohocken, Pa.	3,480.24	22.99	13.81	7.37	14.55
54	The Colony Group	Boston, Mass.	3,387.51	30.16	2.42	15.63	12.57
55	Homrich Berg	Atlanta, Ga.	3,373.93	31.54	2.81	9.62	20.00
56	Welch & Forbes ♦	Boston, Mass.	3,948.62	17.66	5.13	15.67	1.72
57	Hewins Finan. Advisors/Wipfli Hewins Invest. Advisors	San Mateo, Calif.	3,294.00	21.01	2.85	-0.88	22.09
58	Kovitz Investment Group	Chicago, Ill.	3,185.00	31.07	3.25	27.06	3.16
59	Signature	Norfolk, Va.	3,133.14	13.21	14.24	10.12	2.80
60	Global Financial Private Capital	Sarasota, Fla.	3,106.93	52.07	0.24	38.54	9.77
61	Bingham, Osborn & Scarborough	San Francisco, Calif.	3,081.10	20.36	3.42	13.54	6.01
62	RegentAtlantic	Morristown, N.J.	2,935.10	25.97	2.26	6.59	18.18
63	Northeast Financial Consultants	Westport, Conn.	2,860.99	8.50	18.82	7.07	1.33
64	Ingalls & Snyder	New York, N.Y.	2,842.34	11.30	0.84	11.30	0.00
65	R. M. Davis	Portland, Maine	2,842.08	18.78	1.95	11.86	6.18
66	Balasa Dinverno Foltz	Itasca, Ill.	2,752.38	24.41	3.06	15.41	7.79
67	W.E. Family Offices	Miami, Fla.	2,712.74	66.01	44.47	▲	▲
68	Sullivan, Bruyette, Speros & Blayney	McLean, Va.	2,700.00	12.50	3.00	12.50	0.00
69	Dowling & Yahnke	San Diego, Calif.	2,607.53	18.24	2.74	11.14	6.38
70	Manchester Capital Management	Montecito, Calif.	2,594.89	32.22	15.45	29.07	2.44
71	WMS Partners	Towson, Md.	2,576.18	41.65	9.51	39.56	1.50
72	CM Wealth Advisors	Pepper Pike, Ohio	2,551.82	117.92	40.51	100.62	8.62
73	Threshold Group	Gig Harbor, Wash.	2,527.60	0.14	45.96	1.96	-1.79
74	Joel Isaacson & Co.	New York, N.Y.	2,520.15	22.03	2.76	20.16	1.56
75	Brighton Jones	Seattle, Wash.	2,517.02	37.33	3.07	18.22	16.17
76	Inverness Counsel	New York, N.Y.	2,514.59	11.78	15.43	8.35	3.16
77	Matter Family Office	St. Louis, Mo.	2,487.44	13.96	16.81	13.19	0.68
78	American Portfolios Advisors	Holbrook, N.Y.	2,445.76	26.21	0.19	6.99	17.97
79	Plancorp	St. Louis, Mo.	2,431.35	29.47	3.25	18.58	9.18
80	Telemus Capital	Southfield, Mich.	2,423.74	47.72	3.12	6.60	38.57
81	Massey Quick & Co.	Morristown, N.J.	2,417.48	12.48	12.03	3.53	8.65
82	Rehmann Capital Advisory Group	Lansing, Mich.	2,377.75	11.48	1.08	17.96	-5.50
83	Highmount Capital	New York, N.Y.	2,371.46	8.04	20.80	-5.23	14.00
84	Wilbanks, Smith and Thomas Asset Management	Norfolk, Va.	2,367.00	18.47	1.38	5.77	12.00
85	Allegheny Financial Group	Pittsburgh, Pa.	2,345.53	12.31	1.23	10.84	1.33
86	Robertson, Grieger & Thoele	Dallas, Texas	2,337.00	5.94	5.77	-6.09	12.81
87	Clifford Swan Investment Counsel	Pasadena, Calif.	2,288.00	15.85	3.11	22.63	-5.53
88	South Texas Money Management	San Antonio, Texas	2,170.14	17.32	1.59	11.21	5.50
89	Money Matters with Ken Moraif	Plano, Texas	2,151.65	34.02	0.58	19.53	12.12
90	SignatureFD	Atlanta, Ga.	2,035.21	34.48	2.95	-6.45	43.75
91	Weston Financial Group	Wellesley, Mass.	1,988.25	16.38	1.98	16.73	-0.30
92	Retirement Advisors of America	Addison, Texas	1,964.32	22.19	0.94	4.73	16.67
93	Budros, Ruhlin & Roe	Columbus, Ohio	1,957.58	12.84	2.99	10.26	2.34
94	Baker Tilly Investment Advisors	Madison, Wis.	1,876.41	12.86	1.95	-5.28	19.16
95	Stratos Wealth Partners Ltd.	Beachwood, Ohio	1,872.12	76.76	0.36	44.60	22.24
96	Wellesley Investment Advisors	Wellesley, Mass.	1,869.63	47.79	1.80	23.70	19.4
97	Badgley Phelps Investment Managers	Seattle, Wash.	1,820.73	10.79	4.30	9.75	0.95

\*Discretionary and nondiscretionary assets under management reported on Form ADV. \*\*Average assets per client relationship. † Founded in 2013, not meaningful.

▲ Not meaningful. W.E.'s predecessor firm grouped clients differently.

♦ CORRECTION NOTE: Due to a reporting error by Welch & Forbes, its assets were underreported at \$3,355.95 in the survey. The firm's assets as of Dec. 31, 2013, should have been listed as \$3,948,620,385, and their % growth in assets 2012-2013 as +17.66.

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98	Wescott Financial Advisory Group	Philadelphia, Pa.	1,820.09	24.48	4.42	4.24	19.42
99	Pathstone Family Office	Fort Lee, N.J.	1,812.93	22.03	21.84	-0.03	22.06
100	Beirne Wealth Consulting	Milford, Conn.	1,805.00	13.92	3.73	-5.62	20.70
101	Mainstay Capital Management	Grand Blanc, Mich.	1,729.91	34.95	0.48	26.61	6.59
102	JMG Financial Group	Oak Brook, Ill.	1,704.00	11.15	2.99	4.90	5.96
103	WTAS	McLean, Va.	1,685.01	11.84	6.41	-10.27	24.64
104	Warren Averett Asset Management	Birmingham, Ala.	1,683.98	14.07	2.53	7.91	5.71
105	Greenwich Wealth Management	Greenwich, Conn.	1,661.46	17.46	16.78	-0.34	17.86
106	Westmount Asset Management	Los Angeles, Calif.	1,651.50	21.85	1.94	15.57	5.44
107	Hartland	Cleveland, Ohio	1,637.64	31.81	4.85	29.86	1.50
108	Grimes & Company	Westborough, Mass.	1,631.90	14.03	1.10	8.57	5.03
109	RiverPoint Capital Management	Cincinnati, Ohio	1,619.26	17.52	2.95	-12.45	34.23
110	EP Wealth Advisors	Torrance, Calif.	1,616.00	20.15	0.98	14.32	5.10
111	Forum Financial Management	Lombard, Ill.	1,615.62	58.66	0.83	14.14	39.00
112	Truepoint Wealth Counsel	Cincinnati, Ohio	1,615.36	25.27	2.34	10.91	12.95
113	Henssler Financial	Kennesaw, Ga.	1,603.03	17.87	1.36	14.46	2.98
114	Carroll Financial Associates	Charlotte, N.C.	1,567.41	14.86	0.65	5.29	9.09
115	TCI Wealth Advisors	Tucson, Ariz.	1,533.82	25.55	1.11	14.72	9.44
116	Fort Pitt Capital Group	Pittsburgh, Pa.	1,530.84	23.90	1.13	20.14	3.13
117	HBKS Wealth Advisors	Erie, Pa.	1,530.65	22.40	0.59	13.51	7.83
118	Miller Russell Associates	Phoenix, Ariz.	1,530.55	-10.50	3.55	-20.05	11.95
119	Investacorp Advisory Services	Miami, Fla.	1,523.09	15.62	0.22	7.51	7.55
120	Osborne Partners Capital Management	San Francisco, Calif.	1,478.83	11.69	2.67	15.73	-3.49
121	Barrett Asset Management	New York, N.Y.	1,475.00	20.61	7.09	22.92	-1.89
122	The MDE Group	Morristown, N.J.	1,465.44	4.21	7.15	2.17	1.99
123	Hanson McClain Advisors	Sacramento, Calif.	1,461.67	19.90	0.45	13.16	5.96
124	Foster Group	West Des Moines, Iowa	1,455.99	13.16	1.59	5.12	7.65
125	Valeo Financial Advisors	Indianapolis, Ind.	1,442.88	22.24	2.06	8.80	12.36
126	JFS Wealth Advisors	Hermitage, Pa.	1,434.13	59.47	1.26	16.04	37.42
127	Destination Wealth Management	Walnut Creek, Calif.	1,419.44	15.68	1.01	6.59	8.53
128	Accredited Investors	Edina, Minn.	1,377.10	22.93	3.44	16.78	5.26
129	North American Management	Boston, Mass.	1,360.94	15.81	3.76	6.85	8.38
130	Sage Financial Group	Conshohocken, Pa.	1,357.00	35.63	2.38	26.34	7.36
131	Dynasty Wealth Management	New York, N.Y.	1,356.68	-23.34 ■	39.90	-34.61	17.24
132	Filament	Seattle, Wash.	1,346.00	16.71	22.43	-18.30	42.86
133	Covenant Multifamily Offices	San Antonio, Texas	1,341.81	1.27	5.10	-13.75	17.41
134	Highline Wealth Management	Rockville, Md.	1,334.92	11.29	6.48	-2.76	14.44
135	Morton Capital Management	Calabasas, Calif.	1,321.26	16.17	1.88	10.88	4.77
136	Sand Hill Global Advisors	Palo Alto, Calif.	1,307.61	21.41	5.71	1.26	19.90
137	SJS Investment Services	Sylvania, Ohio	1,303.00	18.45	2.51	9.34	8.33
138	Cassaday & Company	McLean, Va.	1,302.43	30.58	1.09	5.41	23.88
139	IPI Wealth Management	Decatur, Ill.	1,300.75	29.47	0.45	1.55	27.49
140	Spire Investment Partners	Reston, Va.	1,288.61	29.82	0.25	47.30	-11.86
141	Modera Wealth Management	Westwood, N.J.	1,287.50	13.56	2.08	9.16	4.03
142	Argent Wealth Management	Waltham, Mass.	1,282.07	110.84	6.41	15.96	81.82
143	Brouwer & Janachowski	Tiburon, Calif.	1,280.00	18.85	2.29	-4.15	24.00
144	Hamilton Capital Management	Columbus, Ohio	1,278.90	25.26	1.08	9.51	14.38
145	Family Management Corporation	New York, N.Y.	1,272.58	2.06	2.23	-4.19	6.5
146	Resource Consulting Group	Orlando, Fla.	1,262.33	25.16	3.51	14.73	9.09

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147	Balentine	Atlanta, Ga.	1,261.51	-14.94	6.09	-17.82	3.50
148	Strategic Wealth Partners	Deerfield, Ill.	1,259.00	27.32	3.83	14.93	10.77
149	Palisades Hudson Asset Management	Fort Lauderdale, Fla.	1,254.52	11.10	13.49	7.52	3.33
150	Sequoia Financial Group	Akron, Ohio	1,221.77	24.00	0.80	16.45	6.48
151	LLBH Private Wealth Management	Westport, Conn.	1,217.52	36.90	6.41	15.28	18.75
152	Pinnacle Advisory Group	Columbia, Md.	1,215.59	20.56	1.45	10.24	9.36
153	TFO-TDC	Maumee, Ohio	1,197.12	15.57	1.16	7.18	7.82
154	Fort Washington Investment Advisors	Cincinnati, Ohio	1,191.60	9.05	2.92	6.38	2.51
155	Frontier Investment Management	Dallas, Texas	1,188.63	18.96	1.45	9.67	8.47
156	Courier Capital Corporation	Buffalo, N.Y.	1,184.89	-35.33	1.66	-38.95	5.93
157	GV Financial Advisors	Atlanta, Ga.	1,184.03	30.90	2.37	17.81	11.11
158	Singer Xenos Wealth Management	Coral Gables, Fla.	1,122.00	11.98	2.04	-0.24	12.24
159	Capstone Financial Advisors	Downers Grove, Ill.	1,121.85	22.10	2.80	6.22	14.94
160	FCE Group	Great Neck, N.Y.	1,093.73	13.14	2.57	6.49	6.25
161	TrustCore Financial Services	Brentwood, Tenn.	1,085.37	7.66	0.99	-1.15	8.91
162	True North Advisors	Dallas, Texas	1,082.53	10.47	2.55	8.13	2.16
163	Brightworth	Atlanta, Ga.	1,077.62	20.28	2.51	11.03	8.33
164	Altfest Personal Wealth Management	New York, N.Y.	1,074.48	18.86	1.96	9.95	8.10
165	Klingman and Associates	New York, N.Y.	1,073.05	59.92	4.28	54.18	3.72
166	HHG & Company	Darien, Conn.	1,069.74	-10.15	4.25	-10.51	0.40
167	Washington Wealth Management	San Diego, Calif.	1,030.82	83.72	0.33	13.38	62.05
168	Legacy Wealth Management	Memphis, Tenn.	1,022.78	13.90	1.33	5.14	8.33
169	Carlson Capital Management	Northfield, Minn.	1,013.00	21.13	1.57	9.71	10.41
170	Atlas Private Wealth Management	Williamstown, Mass.	1,003.63	84.44	0.57	42.28	29.63
<b>ASSET CATEGORY: \$500 MILLION TO &lt; \$1 BILLION</b>							
171	West Financial Services	McLean, Va.	984.59	17.22	1.73	12.27	4.41
172	Guyasuta Investment Advisors	Pittsburgh, Pa.	984.22	20.25	3.94	14.96	4.60
173	ProVise Management Group	Clearwater, Fla.	983.00	29.68	1.22	-1.37	31.48
174	Reynders, McVeigh Capital Management	Boston, Mass.	978.23	20.39	2.38	13.65	5.93
175	Bragg Financial Advisors	Charlotte, N.C.	960.65	20.56	2.13	13.86	5.88
176	The Harbor Group	Bedford, N.H.	953.57	8.74	1.75	14.72	-5.21
177	Schneider Downs Wealth Management Advisors	Pittsburgh, Pa.	951.37	25.85	2.12	11.55	12.81
178	Fairway Wealth Management	Independence, Ohio	917.00	17.11	6.89	5.67	10.83
179	Kovack Advisors	Ft. Lauderdale, Fla.	913.91	12.91	0.25	-2.65	15.99
180	Foster & Motley	Cincinnati, Ohio	913.18	16.75	2.14	7.16	8.95
181	Minneapolis Portfolio Management Group	Minneapolis, Minn.	907.73	31.07	0.61	22.34	7.14
182	Pure Financial Advisors	San Diego, Calif.	904.60	49.20	0.76	14.29	30.55
183	Evensky & Katz	Coral Gables, Fla.	903.91	14.04	2.41	4.91	8.70
184	Mission Wealth Management	Santa Barbara, Calif.	903.06	25.34	1.67	6.38	17.83
185	WESCAP Group	Burbank, Calif.	892.18	16.51	1.98	5.38	10.57
186	Brookstone Capital Management	Wheaton, Ill.	887.00	62.75	0.11	40.92	15.49
187	Sargent Bickham Lagudis	Boulder, Colo.	881.47	1.69	2.33	-8.54	11.18
188	Private Ocean	San Rafael, Calif.	880.25	16.42	2.11	16.98	-0.48
189	Aureus Asset Management	Boston, Mass.	875.00	25.00	14.58	4.17	20.00
190	Strategic Wealth Management Group	Columbia, Md.	874.76	11.06	2.29	92.75	-42.38
191	Delegate Advisors	San Francisco, Calif.	862.10	11.49	45.37	-6.11	18.75
192	Penniall & Associates	Pasadena, Calif.	851.52	30.49	1.42	30.49	0.00
193	Sadoff Investment Management	Milwaukee, Wis.	850.00	32.50	1.47	26.31	4.90
194	Avondale Partners	Nashville, Tenn.	848.94	23.48	3.77	-3.96	28.57

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■ Asset declined because project work for large client ended.

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2013 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2013 ASSETS (\$MM)	% GROWTH IN ASSETS 2012-2013	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
195	Asset Planning Services	Harleysville, Pa.	839.94	17.79	2.68	12.90	4.33
196	Heritage Financial Services	Westwood, Mass.	837.45	14.32	1.27	17.97	-3.09
197	Albion Financial Group	Salt Lake City, Utah	833.04	20.75	1.67	8.67	11.11
198	Stonebridge Capital Advisors	Saint Paul, Minn.	829.10	-0.89	1.05	-12.85	13.73
199	Hallmark Capital Management	Wayne, N.J.	817.00	19.27	2.31	14.20	4.44
200	McKinley Carter Wealth Services	Wheeling, W. Va.	815.35	40.72	0.94	23.68	13.78
201	Creative Financial Group	Atlanta, Ga.	814.68	9.66	1.41	6.06	3.39
202	Summit Financial Strategies	Columbus, Ohio	814.68	21.11	1.47	14.98%	5.33
203	Resnick Investment Advisors	Westport, Conn.	813.93	13.82	0.90	11.07	2.48
204	BSW	Boulder, Colo.	804.00	9.24	4.00	2.17	6.91
205	AEPG Wealth Strategies	Warren, N.J.	779.21	2.22	1.81	-3.95	6.42
206	Jackson Thornton Asset Management	Montgomery, Ala.	777.54	13.77	1.63	4.48	8.88
207	Condor Capital Management	Martinsville, N.J.	765.52	21.90	1.13	19.93	1.64
208	Advisors Capital Management	Hasbrouck Heights, N.J.	763.81	88.13	0.51	12.88	66.67
209	ARGI Financial Group	Louisville, Ky.	755.41	57.14	0.50	56.31	0.53
210	CPS Investment Advisors	Lakeland, Fla.	754.83	25.37	0.34	2.58	22.22
211	Glassman Wealth Services	McLean, Va.	735.58	25.04	4.00	13.49	10.18
212	Annex Wealth Management	Elm Grove, Wis.	735.49	40.62	0.35	87.50	-25.00
213	SFMG Wealth Advisors	Plano, Texas	718.36	29.54	1.82	26.58	2.34
214	LaSalle St. Investment Advisors	Elmhurst, Ill.	716.75	24.60	0.34	16.04	7.38
215	Lenox Wealth Management	Cincinnati, Ohio	714.60	6.46	2.77	5.22	1.18
216	Educators Financial Services	Cambridge, Minn.	710.62	30.81	0.07	23.04	6.32
217	The Investment Counsel Company	Las Vegas, Nev.	710.46	8.48	3.53	5.24	3.08
218	The Advisory Group of San Francisco	San Francisco, Calif.	707.27	16.39	4.16	-0.72	17.24
219	Paragon Capital Management	Denver, Colo.	706.03	8.52	4.97	3.17	5.19
220	Oakwood Capital Management	Los Angeles, Calif.	705.78	12.91	1.89	8.07	4.48
221	WESPAC Advisors	Oakland, Calif.	705.49	16.94	1.06	13.43	3.10
222	Meyer Capital Group	Marlton, N.J.	700.64	19.28	1.00	11.12	7.35
223	Horter Investment Management	Cincinnati, Ohio	700.17	127.20	0.13	27.83	77.73
224	Novare Capital Management	Charlotte, N.C.	695.33	32.66	3.28	13.89	16.48
225	Sigma Investment Counselors	Southfield, Mich.	691.66	22.21	1.36	10.92	10.17
226	R. E. Wacker Wealth Partners	San Luis Obispo, Calif.	690.46	14.62	1.29	9.28	4.89
227	Fusion Family Wealth	New York, N.Y.	688.95	†	4.23	†	†
228	Center for Financial Planning	Southfield, Mich.	683.00	18.35	0.88	18.20	0.13
229	Pettinga Financial Advisors	Evansville, Ind.	679.79	10.86	1.36	10.86	0.00
230	BLB & B Advisors	Ambler, Pa.	669.27	49.24	0.42	24.06	20.30
231	Bitterroot Capital Advisors	Bozeman, Mont.	664.30	0.38	73.81	-10.77	12.50
232	HoyleCohen	San Diego, Calif.	660.66	8.93	1.47	13.31	-3.86
233	Beaird Harris Wealth Management	Dallas, Texas	656.68	24.90	1.77	7.06	16.67
234	CFS Investment Advisory Services	Totowa, N.J.	647.28	25.51	1.68	24.53	0.79
235	Sapient Private Wealth Management	Eugene, Ore.	623.90	12.32	1.81	0.92	11.29
236	Sheaff Brock Investment Advisors	Indianapolis, Ind.	621.05	58.41	0.56	16.65	35.79
237	Lexington Wealth Management	Lexington, Mass.	620.00	19.69	2.37	13.75	5.22
238	Versant Capital Management	Phoenix, Ariz.	607.56	7.29	6.46	-6.41	14.63
239	Steinberg Global Asset Management	Boca Raton, Fla.	604.10	20.62	2.67	16.35	3.67
240	SPC Financial	Rockville, Md.	599.57	-2.30	0.70	32.96	-26.52
241	Relyea Zuckerberg Hanson	Stamford, Conn.	576.00	12.50	5.43	4.01	8.16
242	Mosaic Financial Partners	San Francisco, Calif.	575.97	10.58	2.25	8.85	1.59
243	Regal Investment Advisors	Kentwood, Mich.	575.72	58.08	0.19	-12.89	81.47

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(By Total Assets)

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244	Austin Asset	Austin, Texas	575.26	17.37	1.81	10.70	6.02
245	Retirement Design & Management	Westport, Conn.	569.91	12.89	1.57	2.60	10.03
246	Wealthquest	Cincinnati, Ohio	569.09	13.49	0.67	13.62	-0.12
247	Hokanson Associates	Solana Beach, Calif.	568.21	16.93	2.00	7.87	8.40
248	Kings Point Capital Management	Brentwood, Tenn.	564.04	12.22	5.13	5.08	6.80
249	Lindner Capital Advisors	Marietta, Ga.	555.89	34.98	0.43	29.60	4.15
250	Stepp & Rothwell	Overland Park, Kan.	549.42	18.23	2.69	6.64	10.87
251	GM Advisory Group	Melville, N.Y.	547.47	40.88	2.01	34.69	4.60
252	ERISA Fiduciary Advisors	Weston, Fla.	544.35	80.14	14.71	60.67	12.12
253	ML&R Wealth Management	Austin, Texas	543.91	37.22	1.90	-6.44	46.67
254	Kinsight	Birmingham, Ala.	535.29	6.70	3.52	1.09	5.56
255	Cornerstone Institutional Investors	Bethlehem, Pa.	533.90	20.08	1.33	20.08	0.00
256	StrategicPoint Investment Advisors	Providence, R.I.	527.31	14.37	0.58	23.13	-7.11
257	Petersen Hastings Investment Management	Kennewick, Wash.	526.01	18.96	1.31	5.64	12.61
258	Financial Management Professionals	Austin, Texas	525.59	14.71	0.97	10.05	4.23
259	Patton Albertson & Miller	Chattanooga, Tenn.	516.28	4.35	1.75	1.87	2.43
260	American Financial Advisors	Marietta, Ga.	515.00	14.44	0.40	2.82	11.30
261	Mastrapasqua Asset Management	Nashville, Tenn.	507.94	-4.95	2.54	-4.95	0.00
262	Yeske Buie	Vienna, Va.	501.70	26.15	2.18	21.21	4.07
263	Burt Wealth Advisors	Rockville, Md.	500.93	12.49	2.10	8.72	3.46
<b>ASSET CATEGORY: \$300 MILLION TO &lt;\$500 MILLION</b>							
264	Doyle Wealth Management	St. Petersburg, Fla.	497.93	20.78	1.06	7.41	12.44
265	Pinnacle Wealth Planning Services	Mansfield, Ohio	497.13	9.33	1.08	7.67	1.54
266	Valley National Advisers	Bethlehem, Pa.	493.97	25.97	0.43	13.95	10.55
267	SilverOak Wealth Management	Edina, Minn.	489.73	31.44	2.32	15.87	13.44
268	Windsor Capital Management	Phoenix, Ariz.	477.40	9.37	0.70	5.50	3.66
269	Bridgewater Wealth & Financial Management	Bethesda, Md.	469.55	109.25	2.13	26.50	65.41
270	Frontier Wealth Management	Kansas City, Mo.	465.00	8.14	0.58	-12.14	23.08
271	Gradient Investments	Arden Hills, Minn.	447.32	53.92	0.14	-2.72	58.23
272	Horan Capital Management	Hunt Valley, Md.	446.88	17.71	0.56	21.24	-2.91
273	Polaris Wealth Advisers	San Francisco, Calif.	443.00	36.31	0.99	18.36	15.17
274	Trustmont Advisory Group	Greensburg, Pa.	442.00	-8.49	0.11	48.16	-38.24
275	Montis Financial	Waltham, Mass.	441.82	15.44	2.57	9.40	5.52
276	Weatherly Asset Management	Del Mar, Calif.	440.23	18.29	1.63	7.77	9.76
277	The Mather Group	Oakbrook Terrace, Ill.	435.59	78.52	1.29	48.33	20.36
278	PJS Investment Management	Cedarburg, Wis.	434.11	10.54	1.99	6.48	3.81
279	Connecticut Wealth Management	Farmington, Conn.	428.27	74.82	1.24	44.42	21.05
280	ACG Advisory Services	Midlothian, Va.	426.02	19.34	1.68	14.17	4.53
281	Janiczek & Company	Greenwood Village, Colo.	424.51	24.43	2.56	7.19	16.08
282	Vivaldi Capital Management	Northfield, Ill.	421.25	49.80	3.37	-10.12	66.67
283	Source Financial Advisors	New York, N.Y.	414.26	206.22	5.60	86.22	64.44
284	Meg Green & Associates	Miami, Fla.	411.74	9.24	1.37	0.13	9.09
285	FJY Financial	Reston, Va.	411.65	16.06	1.60	7.96	7.50
286	GDM Advisory Group	Jenkintown, Pa.	410.00	21.30	1.67	16.35	4.26
287	Madison Wealth Management	Cincinnati, Ohio	408.00	16.57	2.32	11.94	4.14
288	AMI Investment Management	Kendallville, Ind.	407.66	12.69	3.48	6.91	5.41
289	Wagner Wealth Management	Denver, Colo.	400.98	10.83	1.68	8.50	2.15
290	Hardy Reed	Tupelo, Miss.	396.79	32.40	1.99	19.09	11.17
291	Van Hulzen Asset Management	El Dorado Hills, Calif.	396.00	29.84	1.20	2.77	26.34

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292	Blankinship & Foster	Solana Beach, Calif.	396.00	15.45	1.76	12.37	2.74
293	LeafHouse Financial Advisor	Austin, Texas	394.90	161.52	2.19	88.88	38.46
294	RJL Wealth Management	San Diego, Calif.	391.19	17.68	0.19	25.48	-6.22
295	Delphi Private Advisors	San Diego, Calif.	384.63	50.47	2.62	7.48	40.00
296	Investmark Advisory Group	Stratford, Conn.	378.00	22.73	0.90	3.73	18.31
297	Larson Financial Group	St. Louis, Mo.	377.13	86.37	0.25	61.52	15.38
298	Lara, May & Associates	Falls Church, Va.	369.71	0.94	0.27	6.99	-5.65
299	Paragon Capital Management	Overland Park, Kan.	368.61	20.64	1.25	16.55	3.51
300	Scarborough Capital Management	Annapolis, Md.	364.35	-39.28	0.15	-39.28	0.00
301	Sunrise Advisors	Leawood, Kan.	363.92	27.01	1.03	17.63	7.98
302	Sather Financial Group	Victoria, Texas	362.00	20.67	1.47	10.86	8.85
303	Lodestar Private Asset Management	Alamo, Calif.	359.80	8.72	1.98	8.72	0.00
304	Inverness Holdings	Beachwood, Ohio	359.19	15.12	1.08	22.06	-5.68
305	Nelson Roberts Investment Advisors	East Palo Alto, Calif.	356.76	34.72	3.10	17.14	15.00
306	Redwood Wealth Management	Alpharetta, Ga.	356.03	34.27	0.71	28.15	4.77
307	Southern Financial Group	Birmingham, Ala.	354.50	21.17	0.41	13.25	6.99
308	Traphagen Investment Advisors	Oradell, N.J.	353.88	30.03	0.35	21.58	6.95
309	Jackson Financial Management	Costa Mesa, Calif.	352.53	10.44	0.80	6.18	4.01
310	R.S. Crum	Newport Beach, Calif.	348.97	68.08	1.94	16.72	44.00
311	Evermay Wealth Management	Arlington, Va.	343.58	16.22	1.89	6.64	8.98
312	The Arkansas Financial Group	Little Rock, Ark.	339.97	15.03	1.35	9.99	4.58
313	CF04Life	Coppe, Texas	336.10	47.04	1.12	-1.98	50.00
314	Quadrant Capital Management	Fairfield, N.J.	335.23	14.78	2.87	4.97	9.35
315	Sycamore Financial Group	Kokomo, Ind.	333.50	41.51	0.25	36.27	3.85
316	HFI Wealth Management	Shepherdstown, W. Va.	331.79	23.91	1.09	15.37	7.39
317	FAI Wealth Management	Columbia, Md.	330.22	8.05	1.47	4.19	3.70
318	Roof Advisory Group	Harrisburg, Pa.	329.18	25.38	1.77	8.53	15.53
319	Absolute Capital Management	Pittsburgh, Pa.	327.00	28.24	0.15	16.58	10.00
320	J. P. King Advisors	Walnut Creek, Calif.	326.30	9.57	1.59	-6.47	17.14
321	WNY Asset Management	Williamsville, N.Y.	325.08	18.32	0.20	3.53	14.29
322	ClearRock Capital	Ketchum, Idaho	325.00	18.18	1.30	1.64	16.28
323	Aurum Wealth Management Group	Mayfield Village, Ohio	325.00	42.54	2.50	20.61	18.18
324	Etesian Wealth Advisors	Lake Oswego, Ore.	322.54	37.09	1.95	3.85	32.00
325	Starfire Investment Advisers	Southfield, Mich.	318.64	23.33	1.23	26.19	-2.26
326	CRA Financial	Northfield, N.J.	317.10	16.98	0.81	1.39	15.38
327	Ellis Investment Partners	Berwyn, Pa.	316.58	68.29	0.93	4.75	60.66
328	Gitterman & Associates Wealth Management	Iselin, N.J.	315.00	-66.84	0.42	-69.05	7.14
329	Vintage Financial Services	Ann Arbor, Mich.	312.42	33.51	0.98	16.41	14.70
330	Financial Management Group	Cincinnati, Ohio	312.00	22.74	1.16	28.23	-4.29
331	Droms Strauss Advisors	St. Louis, Mo.	310.00	25.00	1.55	9.38	14.29
332	KR Financial Services	Hollywood, Fla.	306.96	90.40	1.13	68.00	13.33
333	Financial Planning and Information Services	De Pere, Wis.	305.00	18.68	0.44	15.24	2.99
334	Aveo Capital Partners	Greenwood Village, Colo.	304.58	41.38	1.07	-10.39	57.78
335	Asset Management Advisors	Houston, Texas	304.00	55.10	4.75	50.26	3.23
336	ARS Wealth Advisors	St. Petersburg, Fla.	303.76	22.17	0.93	20.29	1.56
337	The L. Warner Companies	Timonium, Md.	303.12	14.86	1.40	18.57	-3.13
338	Heller Wealth Advisors	Summit, N.J.	302.59	14.76	1.51	0.42	14.29
339	WNA Wealth Advisors	Hinsdale, Ill.	302.07	20.55	0.79	7.86	11.76
340	Ferrell Wealth Management	Winter Park, Fla.	301.18	16.73	1.41	3.64	12.63

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<b>ASSET CATEGORY: \$100 MILLION TO &lt;\$300 MILLION</b>							
341	LVZ Advisors	Holland, Mich.	299.93	28.69	0.24	8.10	19.05
342	Asset Strategies	Casper, Wyo.	299.56	9.01	1.29	15.12	-5.31
343	Kuntz Leshar Capital	Lancaster, Pa.	297.67	30.37	0.74	11.98	16.43
344	Hooker & Holcombe Investment Advisors	West Hartford, Conn.	295.22	11.38	2.68	-16.97	34.15
345	Advocacy Wealth Management	Atlanta, Ga.	293.00	69.36	0.59	8.39	56.25
346	Goodman Financial Corporation	Houston, Texas	291.99	22.20	1.61	15.45	5.85
347	Ruggie Wealth Management	Tavares, Fla.	286.00	13.94	1.00	8.37	5.15
348	Asset Management Group	Stamford, Conn.	284.95	22.81	1.00	21.95	0.70
349	Bernhardt Wealth Management	McLean, Va.	278.97	38.76	1.73	15.49	20.15
350	Avant-Garde Advisors	Centennial, Colo.	278.14	73.59	0.76	10.38	57.26
351	Burton Enright Welch	Walnut Creek, Calif.	277.84	17.19	1.05	10.53	6.02
352	Archford Capital Strategies	Swansea, Ill.	277.60	†	1.09	†	†
353	MACRO Consulting Group	Parsippany, N.J.	276.00	38.00	0.80	20.00	15.00
354	Schroeder, Braxton & Vogt	Amherst, N.Y.	273.73	12.70	0.54	4.00	8.37
355	Consilium Wealth Advisory	Richardson, Texas	270.00	1,700.00	10.80	260.00	400.00
356	Rowling & Associates	San Diego, Calif.	268.00	6.53	1.48	3.58	2.84
357	WorthPointe	Austin, Texas	266.00	77.33	0.76	26.67	40.00
358	Boston Research and Management	Manchester, Mass.	265.07	17.71	2.45	20.98	-2.70
359	Insight Wealth Partners	Plano, Texas	264.20	19.36	0.65	15.26	3.55
360	Bedrock Capital Management	Los Altos, Calif.	261.84	34.37	2.20	14.05	17.82
361	KHC Wealth Management	Overland Park, Kan.	260.88	5.88	1.21	2.43	3.37
362	Glass Jacobson Investment Advisors	Owings Mills, Md.	259.93	17.40	0.73	9.44	7.27
363	William Mack & Associates	Troy, Mich.	259.10	13.64	0.34	10.94	2.44
364	Wechter Feldman Wealth Management	Parsippany, N.J.	252.75	25.48	1.63	20.63	4.03
365	Acorn Financial Services	Fairfax, Va.	247.00	43.60	0.45	18.36	21.33
366	Asset Dedication	San Francisco, Calif.	241.53	37.64	0.28	-3.18	42.17
367	Whitley Penn Financial	Fort Worth, Texas	239.80	36.56	0.89	36.05	0.37
368	Matrix Wealth Advisors	Charlotte, N.C.	236.17	11.89	1.63	18.83	-5.84
369	Mark J. Snyder Financial Services	Medford, N.Y.	235.85	-7.57 ■	0.45	-9.69	2.35
370	Rockwood Wealth Management	New Hope, Pa.	234.46	32.25	0.85	24.55	6.18
371	Horizon Advisors	Houston, Texas	231.00	16.08	2.06	10.90	4.67
372	WheelerFrost Wealth Managers	San Diego, Calif.	230.84	15.83	1.01	12.79	2.69
373	Richmond Brothers	Jackson, Mich.	229.81	57.93	0.37	52.59	3.50
374	Winch Financial	Appleton, Wis.	228.69	21.36	0.36	15.49	5.09
375	DCA Global Wealth Management	Norcross, Ga.	228.37	4.87	1.94	2.20	2.61
376	Jentner Wealth Management	Akron, Ohio	227.99	13.54	1.59	13.54	0.00
377	Bouche Financial Group	Troy, N.Y.	227.31	43.99	0.69	21.67	18.35
378	AM Global Family Investment Office	West Palm Beach, Fla.	226.82	844.28	18.90	450.83	71.43
379	Mark Sheptoff Financial Planning	Glastonbury, Conn.	225.00	27.12	1.44	37.71	-7.69
380	Latitude Advisors	Vero Beach, Fla.	224.45	19.15	0.18	25.99	-5.43
381	Hochman Cole Investment Advisors	Northbrook, Ill.	223.15	26.00	2.05	8.66	15.96
382	Anthony Smith Advisors	Atlanta, Ga.	221.90	17.23	1.67	17.23	0.00
383	BlueSky Wealth Advisors	New Bern, N.C.	220.00	230.63	1.22	56.13	111.76
384	PageOne Financial	Malta, N.Y.	215.47	15.42	0.15	7.13	7.74
385	Wealth Health	Roseland, N.J.	214.48	53.34	2.68	59.09	-3.61
386	SJM Fiduciary Advisors	Boston, Mass.	214.40	47.93	23.82	15.06	28.57
387	Camarda Wealth Advisory Group	Fleming Island, Fla.	213.32	4.54	0.17	6.67	-2.00
388	Pinnacle Financial Group	Western Springs, Ill.	213.02	33.89	0.95	19.02	12.50

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■ AUM dropped because an IAR left the firm with client assets.

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389	Asset Advisory Group	Kinnelon, N.J.	210.74	12.67	1.92	14.72	-1.79
390	Portfolio Wealth Advisors	Albuquerque, N.M.	209.41	19.80	0.74	-1.44	21.55
391	Personal Financial Group	Overland Park, Kan.	209.06	56.69	0.49	47.13	6.50
392	KAM Advisors	Beverly Hills, Calif.	208.14	7.75	1.76	-5.95	14.56
393	Allodium Investment Consultants	Minneapolis, Minn.	206.29	31.34	1.98	21.24	8.33
394	Net Worth Advisory Group	Sandy, Utah	206.20	27.81	0.61	-86.43	841.67
395	Cambridge Wealth Counsel	Atlanta, Ga.	205.92	●	1.40	●	●
396	Financial Management Strategies	Valley View, Ohio	205.58	46.46	0.50	34.04	9.26
397	WJ Interests	Sugar Land, Texas	202.00	26.25	1.14	9.84	14.94
398	Mutual Fund Management	Troy, Mich.	200.54	11.40	0.71	15.74	-3.75
399	Integriss	La Jolla, Calif.	198.13	-0.93	5.66	-15.09	16.67
400	Moss Booth Wealth Advisors	Scottsdale, Ariz.	198.09	10.25	1.45	2.20	7.87
401	Clune & Associates	Chicago, Ill.	197.01	38.48	1.61	27.13	8.93
402	Poehling Capital Management	Madison, Wis.	196.31	43.30	0.59	33.37	7.44
403	Storey & Associates	North Canton, Ohio	191.60	22.56	1.06	-8.08	33.33
404	SRS Capital Advisors	Denver, Colo.	190.59	24.22	0.76	36.64	-9.09
405	Andrews, Lucia Wealth Management	San Mateo, Calif.	190.43	49.29	1.73	18.08	26.44
406	Trinity Financial Advisors	Chicago, Ill.	189.65	9.31	3.06	5.78	3.33
407	Baron Financial Group	Fair Lawn, N.J.	188.00	27.54	0.90	21.47	5.00
408	Piershale Financial Group	Crystal Lake, Ill.	186.79	5.28	0.44	-4.63	10.39
409	Financial Symmetry	Raleigh, N.C.	186.75	24.67	0.71	12.39	10.92
410	Tull Financial Group	Chesapeake, Va.	186.54	22.23	0.82	16.84	4.61
411	Next Generation Wealth Management	Milwaukee, Wis.	185.59	69.28	0.99	-16.26	102.15
412	Wealth Care	Merritt Island, Fla.	180.00	38.46	1.96	26.42	9.52
413	Johnson Lyman Wealth Advisors	Palo Alto, Calif.	178.94	20.23	1.41	10.76	8.55
414	Woodward Financial Advisors	Chapel Hill, N.C.	175.06	35.34	1.67	23.74	9.38
415	Cape Ann Capital	Manchester, Mass.	175.00	56.25	1.05	44.09	8.44
416	Paragon Financial Advisors	College Station, Texas	174.46	-8.78 ■	1.44	-23.85	19.80
417	McCarthy Asset Management	Redwood Shores, Calif.	173.02	26.46	0.87	25.19	1.01
418	Reston Wealth Management	Reston, Va.	168.65	44.01	0.42	-1.00	45.45
419	Lighthouse Financial Services	Brea, Calif.	168.62	54.93	0.56	25.49	23.46
420	Precipio Wealth Management	McLean, Va.	165.93	33.75	1.95	21.16	10.39
421	Netting & Pace, CPAs	San Antonio, Texas	165.06	16.00	2.85	10.00	5.45
422	Rainey & Randall Investment Management	Celebration, Fla.	165.00	10.74	1.00	-2.68	13.79
423	Asset Planning Corporation	Knoxville, Tenn.	160.74	16.22	1.09	11.51	4.23
424	Asset Planning	Cypress, Calif.	160.05	19.10	0.76	13.43	5.00
425	Karsten Advisors	Fort Worth, Texas	157.57	14.56	0.25	-36.15	79.43
426	Client 1st Advisory Group	Clearwater, Fla.	156.73	*	0.93	*	*
427	Hines Warner Wealth Management	Portland, Ore.	155.47	44.62	1.30	20.52	20.00
428	Miller Advisors	Kirkland, Wash.	155.07	16.15	0.83	21.14	-4.12
429	RPH Financial Services	Stroudsburg, Pa.	152.76	27.86	1.33	26.74	0.88
430	Sentinel Wealth Management	Reston, Va.	152.73	17.61	1.76	14.90	2.35
431	1st Portfolio Wealth Advisors	Vienna, Va.	152.66	21.66	1.08	6.13	14.63
432	Family Wealth Advisory Group	Cincinnati, Ohio	152.11	19.92	1.19	23.67	-3.03
433	The Darrow Company	Concord, Mass.	150.80	21.87	1.24	6.89	14.02
434	Searcy Financial Services	Overland Park, Kan.	149.41	13.77	1.14	13.77	0.00
435	Regency Wealth Management	Ramsey, N.J.	149.00	19.20	0.73	7.57	10.81
436	TABR Capital Management	Orange, Calif.	148.30	-8.47	0.62	-1.63	-6.95
437	J. M. Egan Wealth Advisors	Madison, N.J.	147.19	13.82	0.74	42.27	-20.00

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● Not meaningful. Cambridge became SEC registered in 2013. 2012 assets were not considered "assets under management" by regulators. ■ AUM dropped from a company's retirement plan voluntarily being moved elsewhere.

# FA'S 2014 RIA RANKING

(By Total Assets)

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2013 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2013 ASSETS (\$MM)	% GROWTH IN ASSETS 2012-2013	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
438	Hanover Advisors	Atlanta, Ga.	146.00	32.73	0.80	13.14	17.31
439	Grand Wealth Management	Grand Rapids, Mich.	143.22	31.61	2.05	3.41	27.27
440	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	141.23	23.50	0.53	15.60	6.83
441	Samalin Investment Counsel	Chappaqua, N.Y.	140.69	10.36	0.80	-0.99	11.46
442	Core Capital Solutions	Naperville, Ill.	140.36	20.54	1.92	22.19	-1.35
443	Mendel Money Management	Northbrook, Ill.	140.36	21.31	1.07	25.01	-2.96
444	AOG Wealth Management	Great Falls, Va.	140.00	†	1.00	†	†
445	Glenn Woody Financial Consultants	Costa Mesa, Calif.	139.96	8.79	0.79	8.79	0.00
446	Berno Financial Management	Cincinnati, Ohio	138.98	20.68	1.56	11.19	8.54
447	Cornerstone Wealth Management	Westlake, Ohio	138.97	25.92	0.56	25.41	0.41
448	Covenant Wealth Advisors	Williamsburg, Va.	137.13	8.49	1.26	6.50	1.87
449	Heritage Way Advisors	Rockford, Ill.	137.01	3.08	1.52	-2.64	5.88
450	Financial Fiduciaries	Wausau, Wis.	136.90	26.81	0.55	1.45	25.00
451	Byrne Asset Management	Princeton, N.J.	134.50	18.33	1.48	7.92	9.64
452	Tim Looney Investments	Altamonte Springs, Fla.	133.35	16.20	0.56	-3.16	20.00
453	BondStreet Wealth Management	Everett, Wash.	133.24	14.93	0.33	14.93	0.00
454	MDK Financial Group	Houston, Texas	133.00	16.67	0.29	10.33	5.75
455	Hammond Iles Wealth Advisors	Wethersfield, Conn.	132.60	12.41	0.19	9.46	2.69
456	CLA Financial Advisors	Northbrook, Ill.	130.00	20.37	0.93	3.17	16.67
457	Legacy Consulting Group	Plano, Texas	129.69	7.87	1.38	0.98	6.82
458	Raskob Kambourian Financial	Tucson, Ariz.	129.36	-6.54	0.51	-10.94	4.94
459	Apex Financial Advisors	Yardley, Pa.	129.00	5.74	2.69	10.14	-4.00
460	TriCor Advisory Services	Las Vegas, Nev.	128.32	16.09	0.22	52.96	-24.11
461	Resolute Financial	Newburyport, Mass.	128.12	32.92	0.71	25.54	5.88
462	Financial Insights	Tacoma, W. Va.	128.03	27.94	0.51	27.94	0.00
463	Kemp Financial Management	Fullerton, Calif.	128.00	24.27	0.93	8.96	14.05
464	LJCooper Capital Management	Orem, Utah	125.44	4.65	0.38	-12.16	19.13
465	Integrated Wealth Management	Scottsdale, Ariz.	123.77	6.40	0.39	-0.25	6.67
466	Andrews Advisory Associates	Honolulu, Hawaii	123.00	16.04	0.57	8.45	7.00
467	Vermillion Financial Advisors	South Barrington, Ill.	122.93	9.82	0.85	6.79	2.84
468	Kenjol Capital Management	Austin, Texas	122.81	15.68	0.73	7.47	7.64
469	Sard Wealth Management Group	Atlanta, Ga.	121.98	11.57	0.56	0.72	10.77
470	Professional Financial Strategies	Pittsford, N.Y.	121.10	7.12	1.36	13.13	-5.32
471	Securus Wealth Management	Plymouth, Minn.	120.00	12.15	0.99	-0.83	13.08
472	CTB Financial Services	Minneapolis, Minn.	120.00	9.09	0.67	1.82	7.14
473	JVL Associates	Wyoming, Mich.	119.70	9.19	4.43	-2.95	12.50
474	Traub Capital Management	Needham, Mass.	119.00	-12.50	2.02	-37.71	40.48
475	Spraker Wealth Management	Maitland, Fla.	118.63	16.96	1.35	6.33	10.00
476	Beacon Financial Advisors	Rye Brook, N.Y.	118.45	16.12	2.82	16.12	0.00
477	Sebold Capital Management	Naperville, Ill.	116.19	30.36	1.01	6.56	22.34
478	Rainsberger Wealth Advisors	Colorado Springs, Colo.	114.15	8.87	1.09	-1.50	10.53
479	Financial Alternatives	La Jolla, Calif.	113.75	13.16	1.78	9.62	3.23
480	Lighthouse Financial	Broomfield, Colo.	113.13	10.82	0.48	22.04	-9.20
481	Moler Capital Management	Irvine, Calif.	112.00	17.89	1.78	17.89	0.00
482	Focus Financial Advisors	Rockford, Ill.	111.14	2.36	0.68	-13.24	17.99
483	Vellum Financial	San Luis Obispo, Calif.	110.50	-30.06	0.32	-30.06	0.00
484	EHD Advisory Services	Lancaster, Pa.	110.05	23.83	0.77	10.75	11.81
485	Warren Financial Service	Exton, Pa.	109.38	52.60	0.50	49.11	2.34
486	American Financial & Tax Strategies	New York, N.Y.	108.99	19.02	0.78	8.75	9.45

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# FA'S 2014 RIA RANKING

(By Total Assets)

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2013 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2013 ASSETS (\$MM)	% GROWTH IN ASSETS 2012-2013	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
487	<b>Brown McLeod dba Brown Financial Advisory</b>	Fairhope, Ala.	<b>107.92</b>	18.91	0.68	8.44	9.66
488	<b>The Blakeley Group</b>	Santa Clara, Calif.	<b>106.82</b>	0.00	1.59	-8.96	9.84
489	<b>Garnet Group</b>	Bethesda, Md.	<b>106.79</b>	16.57	2.43	8.62	7.32
490	<b>Northstar Financial Planners</b>	Plantation, Fla.	<b>104.18</b>	27.33	0.51	13.53	12.15
491	<b>Alpha Wealth Strategies</b>	Kingwood, Texas	<b>103.81</b>	17.67	6.92	17.67	0.00
492	<b>Red Door Wealth Management</b>	Memphis, Tenn.	<b>102.85</b>	37.92	1.03	17.23	17.65
493	<b>Novos Planning Associates</b>	New York, N.Y.	<b>102.04</b>	9.97	1.62	13.46	-3.08
494	<b>Paragon Wealth Management</b>	Provo, Utah	<b>100.95</b>	0.20	0.68	2.22	-1.97
495	<b>SiligmueLLer &amp; Norvid Wealth Advisors</b>	Glen Ellyn, Ill.	<b>100.00</b>	17.65	1.67	-5.88	25.00
496	<b>Colman Knight Advisory Group</b>	Carlisle, Mass.	<b>100.00</b>	0.00	1.54	3.08	-2.99
<b>ASSET CATEGORY: \$75 MILLION TO &lt;\$100 MILLION</b>							
497	<b>Palisade Investments</b>	Stateline, Nev.	<b>99.31</b>	40.07	0.99	0.85	38.89
498	<b>Alpha Financial Advisors</b>	Charlotte, N.C.	<b>92.99</b>	46.41	0.73	32.68	10.34
499	<b>MontVue Capital Management</b>	Lynchburg, Va.	<b>91.87</b>	26.16	0.81	-2.61	29.55
500	<b>Pauley Financial</b>	Austin, Texas	<b>91.05</b>	0.00	1.82	20.00	-16.67
501	<b>Summit Place Financial Advisors</b>	Summit, N.J.	<b>85.19</b>	25.91	6.09	16.92	7.69
502	<b>Clay Northam Wealth Management</b>	Seal Beach, Calif.	<b>78.06</b>	48.11	0.31	33.30	11.11
503	<b>Cathy Pareto and Associates</b>	Coral Gables, Fla.	<b>77.12</b>	23.37	0.77	8.57	13.64
504	<b>Sage Future Financial</b>	Albuquerque, N.M.	<b>75.24</b>	22.18	1.88	13.02	8.11
<b>ASSET CATEGORY: \$50 MILLION TO &lt;\$75 MILLION</b>							
505	<b>Ron Beaton's Money Matters</b>	Paducah, Ky.	<b>69.00</b>	21.16	1.23	18.99	1.82
506	<b>Northvest</b>	Keene, N.H.	<b>67.00</b>	17.54	1.31	17.54	0.00
507	<b>BrightPath Wealth Planning</b>	Santa Barbara, Calif.	<b>66.30</b>	30.52	0.95	49.1	-12.50
508	<b>FPC Investment Advisory</b>	Petaluma, Calif.	<b>65.00</b>	22.64	0.67	20.11	2.11
509	<b>St. John &amp; Associates</b>	Roswell, Ga.	<b>64.45</b>	13.27	0.52	5.11	7.76
510	<b>Elderado Financial</b>	Montrose, Colo.	<b>61.12</b>	9.84	0.29	5.61	4.00
511	<b>Jarvis Financial Services</b>	Federal Way, W. Va.	<b>60.00</b>	50.00	0.46	32.69	13.04
512	<b>Artifex Financial Group</b>	Oakwood, Ohio	<b>60.00</b>	0.00	0.24	-28.00	38.89
513	<b>G. DeWayne McAnally</b>	Oklahoma City, Okla.	<b>57.55</b>	11.66	0.16	-7.16	20.27
514	<b>Bills Asset Management</b>	Franklin, Tenn.	<b>55.82</b>	3.42	0.25	-1.28	4.76
515	<b>Mission Creek Capital Partners</b>	San Francisco, Calif.	<b>55.08</b>	409.99	0.69	91.25	166.67
516	<b>Gold Medal Waters</b>	Boulder, Colo.	<b>54.78</b>	17.61	0.55	4.54	12.50
517	<b>Woloshin Investment Management</b>	Medford, N.J.	<b>54.50</b>	70.31	0.14	39.74	21.88
518	<b>Financial Life Advisors</b>	San Antonio, Texas	<b>51.70</b>	25.48	0.78	8.36	15.79
519	<b>Sherwood Investment Services</b>	Redmond, Wash.	<b>50.00</b>	25.00	1.00	0.00	25.00
<b>ASSET CATEGORY: &lt;\$50 MILLION</b>							
520	<b>RHS Financial</b>	San Francisco, Calif.	<b>47.00</b>	28.77	0.57	13.25	13.70
521	<b>Netherby Advisors</b>	Westport, Conn.	<b>45.19</b>	34.36	0.60	7.48	25.00
522	<b>Family Office Advisors</b>	New York, N.Y.	<b>39.00</b>	-7.14	3.55	-15.58	10.00
523	<b>Safe Harbor Asset Management</b>	Huntington, N.Y.	<b>33.00</b>	87.56	0.75	53.46	22.22
524	<b>Pohlman Capital Advisors</b>	Chapel Hill, N.C.	<b>32.32</b>	16.37	5.39	-61.21	200.00
525	<b>Horizons Sustainable Financial Services</b>	Santa Fe, N.M.	<b>22.80</b>	†	0.11	†	†
526	<b>MangoTree Capital</b>	Sterling Heights, Mich.	<b>22.00</b>	83.33	0.44	-8.33	100.00
527	<b>Synergy Financial Group of Arizona</b>	Scottsdale, Ariz.	<b>20.58</b>	-71.80	0.08	-63.54	-22.67
528	<b>Timmons Wealth Management</b>	Attleboro, Mass.	<b>7.73</b>	274.18	0.26	37.20	172.73
529	<b>Coroebus Wealth Management</b>	Newark, N.J.	<b>5.40</b>	†	2.70	†	†

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\*Firms with less than \$50 million AUM appear in the online version of this ranking.