

FINANCIAL ADVISOR

**FA**

KNOWLEDGE FOR THE SOPHISTICATED ADVISOR

SPONSORED BY



2014 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)*	% GROWTH IN ASSETS 2013-2014	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
<b>ASSET CATEGORY: \$1 BILLION AND OVER</b>							
1	First Republic Investment Management	San Francisco, Calif.	35,299.51	35.82	4.71	11.04	22.31
2	CTC   myCFO	Chicago, Ill.	30,390.00	5.23	144.71	0.22	5.00
3	Hall Capital Partners	San Francisco, Calif.	30,108.44	8.97	228.09	8.97	0.00
4	Silvercrest Asset Management	New York, N.Y.	16,289.73	14.16	30.28	2.49	11.39
5	Creative Planning	Leawood, Kan.	14,330.72	57.39	1.69	24.06	26.87
6	Moneta Group	Clayton, Mo.	14,068.56	1.82	4.76	-3.21	5.20
7	Edelman Financial Services	Fairfax, Va.	13,931.80	19.77	0.55	1.39	18.13
8	Oxford Financial Group	Indianapolis, Ind.	13,818.18	10.97	21.26	10.97	0.00
9	Veritable	Newtown Square, Pa.	13,448.85	3.89	64.35	3.40	0.48
10	United Capital Financial Advisers	Newport Beach, Calif.	11,142.66	16.60	1.05	2.98	13.22
11	Plante Moran Financial Advisors	Southfield, Mich.	10,997.21	13.08	4.56	3.04	9.74
12	Shepherd Kaplan	Boston, Mass.	10,275.86	-1.27	51.38	-1.27	0.00
13	Brownson, Rehms & Foxworth	Chicago, Ill.	10,127.87	8.19	18.90	5.37	2.68
14	Mariner Wealth Advisors	Leawood, Kan.	10,103.45	17.02	1.99	-65.36	237.87
15	GenSpring Family Offices	Jupiter, Fla.	9,708.82	-16.32	30.82	-5.16	-11.76
16	The Mutual Fund Store	Overland Park, Kan.	9,560.00	8.88	0.25	4.16	4.54
17	BBR Partners	New York, N.Y.	8,884.30	34.75	85.43	20.50	11.83
18	Innovest Portfolio Solutions	Denver, Colo.	8,862.58	61.58	38.04	49.10	8.37
19	DiMeo Schneider & Associates	Chicago, Ill.	8,762.44	17.46	26.88	9.17	7.59
20	Johnson Investment Counsel	Cincinnati, Ohio	8,675.59	5.87	3.14	4.03	1.77
21	Aspiriant	Los Angeles, Calif.	8,426.73	4.15	8.87	-4.62	9.20
22	Ronald Blue & Co.	Roswell, Ga.	8,271.69	5.67	1.36	5.67	0.00
23	Convergent Wealth Advisors	Potomac, Md.	8,202.05	-2.62	26.12	36.77	-28.80
24	Geneva Advisors	Chicago, Ill.	7,794.90	6.35	2.00	3.62	2.63
25	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	7,659.52	16.52	12.06	6.79	9.11
26	Litman Gregory	Larkspur, Calif.	7,533.24	-2.24	22.69	-11.37	10.30
27	Beacon Pointe Advisors	Newport Beach, Calif.	7,359.13	17.52	5.66	8.48	8.33
28	myCIO Wealth Partners	Philadelphia, Pa.	7,003.26	8.42	11.03	2.79	5.48
29	Buckingham Asset Management	St. Louis, Mo.	6,638.61	18.61	1.73	-9.79	31.48
30	Athena Capital Advisors	Lincoln, Mass.	5,943.70	16.66	114.30	-3.53	20.93
31	Evercore Wealth Management	New York, N.Y.	5,698.93	16.92	11.33	16.23	0.60
32	Tiedemann Wealth Management	New York, N.Y.	5,336.27	16.33	37.58	6.50	9.23
33	Ballentine Partners	Waltham, Mass.	5,238.45	9.64	34.24	3.91	5.52
34	GW & Wade	Wellesley, Mass.	5,059.21	10.28	2.09	-2.18	12.75
35	Gresham Partners	Chicago, Ill.	4,758.20	4.08	62.61	1.34	2.70
36	Clarfeld Financial Advisors	Tarrytown, N.Y.	4,625.00	4.35	12.33	-2.60	7.14
37	Heber Fuger Wendin	Bloomfield Hills, Mich.	4,516.83	-4.37	36.43	-11.31	7.83
38	Cornerstone Advisors Asset Management	Bethlehem, Pa.	4,514.87	14.36	38.59	-2.26	17.00
39	The Presidio Group	San Francisco, Calif.	4,438.09	9.60	27.74	-4.10	14.29
40	Mason Investment Advisory Services	Reston, Va.	4,419.31	8.53	6.22	0.88	7.58
41	Tolleson Wealth Management	Dallas, Texas	4,418.65	13.85	31.56	4.09	9.38
42	Douglas C. Lane & Associates	New York, N.Y.	4,378.18	21.68	4.38	9.51	11.11
43	Northside Capital Management	Hood River, Ore.	4,247.21	-3.67	157.30	-10.81	8.00
44	Ferguson Wellman Capital Management	Portland, Ore.	4,198.90	9.26	5.95	0.44	8.78
45	Sontag Advisory	New York, N.Y.	4,188.75	7.08	3.60	11.41	-3.89
46	Welch & Forbes	Boston, Mass.	4,169.44	5.59	5.57	6.86	-1.19
47	Halbert Hargrove Global Advisors	Long Beach, Calif.	4,108.38	3.36	7.84	-0.19	3.56
48	Federal Street Advisors	Boston, Mass.	4,050.57	8.32	28.13	5.32	2.86
49	Homrich Berg	Atlanta, Ga.	3,936.16	16.66	3.03	7.69	8.33
50	Forbes Family Trust	New York, N.Y.	3,913.82	118.55	76.74	54.27	41.67
51	Mill Creek Capital Advisors	Conshohocken, Pa.	3,838.00	10.29	14.32	3.70	6.35

\* Discretionary and nondiscretionary AUM reported on Form ADV. \*\* Average assets per client relationship. NM = not meaningful.

This copy is for your personal, non-commercial use only. Reproductions and distribution of this news story are strictly prohibited. For reprints of the PDF contact Susanna Marra at 732-450-8866 ext 24, susanna@fa-mag.com

2014 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)*	% GROWTH IN ASSETS 2013-2014	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
52	MAI Capital Management	Cleveland, Ohio	3,819.71	8.01	5.47	20.85	-10.63
53	The Colony Group	Boston, Mass.	3,813.02	12.56	2.41	-0.60	13.24
54	Robertson, Griego and Thoele	Dallas, Texas	3,754.41	60.65	7.43	28.84	24.69
55	CV Advisors	Aventura, Fla.	3,718.43	19.52	42.25	-6.29	27.54
56	Wetherby Asset Management	San Francisco, Calif.	3,695.97	1.07	7.18	0.09	0.98
57	RMB Capital Management	Chicago, Ill.	3,654.31	-8.13	2.79	-27.12	26.06
58	Hewins Financial Advisors/Wipfli Hewins Invest. Advisors	San Mateo, Calif.	3,591.56	9.03	2.59	-9.20	20.09
59	WE Family Offices	Miami, Fla.	3,313.74	22.15	48.73	9.58	11.48
60	Adviser Investments	Newton, Mass.	3,296.32	10.88	1.21	1.85	8.87
61	RegentAtlantic	Morristown, N.J.	3,157.18	7.57	2.89	1.66	5.81
62	Signature Family Wealth Advisors ♦	Norfolk, Va.	3,331.32	-0.01	14.48	-2.62	2.68
63	Kovitz Investment Group	Chicago, Ill.	3,130.00	-1.73	3.13	-3.69	2.04
64	Balasa Dinverno Foltz	Itasca, Ill.	3,109.16	12.96	3.21	4.80	7.79
65	Manchester Capital Management	Montecito, Calif.	3,108.66	19.80	66.14	24.90	-4.08
66	Ingalls & Snyder	New York, N.Y.	3,069.56	7.99	0.90	7.99	0.00
67	Rehmann Financial	Lansing, Mich.	3,038.44	27.78	1.38	35.04	-5.37
68	Threshold Group	Seattle, W.Va.	2,992.25	18.38	49.87	8.52	9.09
69	Freestone Capital Management	Seattle, Wash.	2,962.27	1.17	2.43	3.58	-2.33
70	Dowling & Yahnke	San Diego, Calif.	2,906.58	11.47	2.86	4.12	7.05
71	Brighton Jones	Seattle, Wash.	2,896.67	15.08	2.97	-3.43	19.17
72	Joel Isaacson & Co.	New York, N.Y.	2,877.59	14.18	2.99	8.37	5.36
73	Sullivan, Bruyette, Speros & Blayney	McLean, Va.	2,869.00	6.26	3.02	1.23	4.97
74	Conrad Siegel Investment Advisors	Harrisburg, Pa.	2,828.30	245.63	20.35	168.55	28.70
75	WMS Partners	Towson, Md.	2,749.08	6.71	9.26	-2.63	9.59
76	Allegheny Financial Group	Pittsburgh, Pa.	2,742.32	16.92	1.37	11.07	5.26
77	Plancorp	St. Louis, Mo.	2,737.40	12.02	3.27	0.25	11.75
78	Matter Family Office	St. Louis, Mo.	2,686.32	8.00	16.69	-0.72	8.78
79	Money Matters with Ken Moraif	Plano, Texas	2,659.62	23.61	0.53	-1.11	25.00
80	Index Fund Advisors	Irvine, Calif.	2,629.39	18.12	1.38	11.90	5.56
81	Massey Quick & Co.	Morristown, N.J.	2,627.00	8.67	9.19	-23.63	42.29
82	Inverness Counsel	New York, N.Y.	2,611.11	5.84	7.15	7.29	-1.35
83	Resources Investment Advisors	Leawood, Kan.	2,578.92	5.72	2.36	-6.00	12.46
84	Wilbanks, Smith & Thomas Asset Management	Norfolk, Va.	2,561.53	10.75	1.24	-7.74	20.03
85	South Texas Money Management	San Antonio, Texas	2,560.27	17.98	1.68	5.31	12.03
86	American Portfolios Advisors	Holbrook, N.Y.	2,523.14	3.16	0.19	1.30	1.84
87	Clifford Swan Investment Counsel	Pasadena, Calif.	2,466.00	7.78	3.19	2.48	5.17
88	Wellesley Investment Advisors	Wellesley, Mass.	2,364.43	26.47	2.39	32.34	-4.44
89	Bailard	Foster City, Calif.	2,335.48	3.74	3.91	-5.99	10.35
90	Hartland & Co.	Cleveland, Ohio	2,264.16	38.26	4.26	-12.16	57.40
91	Miller Russell Associates	Phoenix, Ariz.	2,255.03	8.11	4.50	-0.95	9.15
92	SignatureFD	Atlanta, Ga.	2,239.72	10.05	2.90	-1.51	11.74
93	Meristem	Minnnetonka, Minn.	2,205.00	10.14	6.87	9.80	0.31
94	Highmount Capital	New York, N.Y.	2,172.56	-8.39	18.57	-10.74	2.63
95	Budros, Ruhlin & Roe	Columbus, Ohio	2,150.78	9.96	3.25	8.97	0.92
96	Bronfman E. L. Rothschild	Madison, Wis.	2,139.61	14.03	2.06	5.80	7.78
97	Honkamp Krueger Financial Services	Dubuque, Iowa	2,115.58	21.44	0.76	12.77	7.69
98	Weston Financial Group	Wellesley, Mass.	2,109.17	6.08	2.10	6.51	-0.40
99	Grimes & Company	Westborough, Mass.	2,108.00	14.03	1.48	7.55	6.02
100	Wescott Financial Advisory Group	Philadelphia, Pa.	2,078.71	14.21	4.67	5.74	8.01
101	Forum Financial Management	Lombard, Ill.	2,004.64	24.08	0.97	16.36	6.63
102	Foundation Resource Management	Little Rock, Ark.	1,979.42	0.11	11.00	-3.23	3.45
103	Covington Capital Management	Los Angeles, Calif.	1,972.53	10.49	5.56	-6.63	18.33

\* Discretionary and nondiscretionary AUM reported on Form ADV. \*\* Average assets per client relationship. NM = not meaningful.

♦ CORRECTION NOTE: Due to a reporting error by Signature Family Wealth, its assets were incorrectly reported in the survey at \$3,133.32. The firm's assets as of Dec 31, 2014, should have been listed as \$3,331.32, % growth in assets 2013-2014 as -0.01%; assets per client \$14.48; % in growth in assets per client as -2.62%.

This copy is for your personal, non-commercial use only. Reproductions and distribution of this news story are strictly prohibited. For reprints of the PDF contact Susanna Marra at 732-450-8866 ext 24, susanna@fa-mag.com

2014 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)*	% GROWTH IN ASSETS 2013-2014	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
104	Retirement Advisors of America	Addison, Texas	1,963.75	-0.03	0.92	-2.03	2.05
105	Greenspring Wealth Management	Towson, Md.	1,961.05	23.59	6.41	-15.19	45.71
106	Beirne Wealth Consulting	Milford, Conn.	1,946.11	29.30	2.51	-14.47	51.17
107	Heritage Investors Management Corp.	Bethesda, Md.	1,940.55	12.26	5.32	6.11	5.80
108	RiverPoint Capital Management	Cincinnati, Ohio	1,936.03	19.56	2.93	-0.70	20.40
109	HBKS Wealth Advisors	Erie, Pa.	1,918.00	10.68	0.73	1.04	9.54
110	Mainstay Capital Management	Grand Blanc, Mich.	1,900.13	9.84	0.51	6.72	2.93
111	Badgley Phelps Investment Managers	Seattle, Wash.	1,886.73	3.62	4.17	-3.02	6.86
112	RINET Company	Boston, Mass.	1,884.81	1.59	11.56	-7.76	10.14
113	Truepoint Wealth Counsel	Cincinnati, Ohio	1,859.43	15.11	2.88	22.96	-6.39
114	JMG Financial Group	Oak Brook, Ill.	1,859.00	9.10	3.09	3.12	5.80
115	Dynasty Wealth Management	New York, N.Y.	1,848.85	36.28	46.22	12.43	21.21
116	Warren Averett Asset Management	Birmingham, Ala.	1,838.05	9.15	2.54	0.27	8.86
117	Gerstein Fisher	New York, N.Y.	1,835.82	8.11	1.59	1.16	6.86
118	Pathstone Family Office	Fort Lee, N.J.	1,834.63	1.20	22.37	2.43	-1.20
119	EP Wealth Advisors	Torrance, Calif.	1,826.41	13.02	1.04	6.56	6.06
120	Westmount Asset Management	Los Angeles, Calif.	1,820.47	10.23	1.88	-2.96	13.60
121	Hanson McClain Advisors	Sacramento, Calif.	1,796.65	11.41	0.47	8.34	2.83
122	Carroll Financial Associates	Charlotte, N.C.	1,770.15	12.94	1.04	6.29	6.25
123	Andersen Tax	McLean, Va.	1,755.41	4.18	6.62	3.00	1.15
124	Telemus Capital	Southfield, Mich.	1,734.73	-9.48	2.20	-11.08	1.80
125	Valeo Financial Advisors	Indianapolis, Ind.	1,721.95	19.34	2.15	4.42	14.29
126	Parsec Financial Management	Asheville, N.C.	1,712.68	9.51	1.45	6.54	2.78
127	TCI Wealth Advisors	Tucson, Ariz.	1,666.73	8.67	1.12	1.04	7.54
128	G.W. Henssler & Associates	Kennesaw, Ga.	1,628.34	1.45	1.31	-4.10	5.79
129	Modera Wealth Management	Westwood, N.J.	1,621.35	25.92	1.85	-8.68	37.89
130	Investacorp Advisory Services	Miami, Fla.	1,599.06	21.38	0.24	25.01	-2.90
131	Barrett Asset Management	New York, N.Y.	1,595.00	8.14	7.67	6.58	1.46
132	Sage Financial Group	Conshohocken, Pa.	1,589.41	20.23	2.65	17.82	2.04
133	Greenwich Wealth Management	Greenwich, Conn.	1,565.50	-5.78	14.23	-15.20	11.11
134	Osborne Partners Capital Management	San Francisco, Calif.	1,563.04	5.69	2.77	3.63	1.99
135	Green Square Capital	Memphis, Tenn.	1,559.38	1.39	11.55	-6.87	8.87
136	Evensky & Katz / Foldes Financial Wealth Management	Coral Gables, Fla.	1,558.00	72.54	1.77	-25.78	132.45
137	Sand Hill Global Advisors	Palo Alto, Calif.	1,543.00	18.00	6.57	7.96	9.30
138	Sequoia Financial Group	Akron, Ohio	1,523.64	24.71	0.96	23.84	0.70
139	Spire Investment Partners	McLean, Va.	1,507.44	16.98	0.75	75.47	-33.33
140	Foster Group	West Des Moines, Iowa	1,500.39	3.05	1.53	-3.26	6.52
141	Destination Wealth Management	Walnut Creek, Calif.	1,489.92	5.37	1.12	-0.18	5.56
142	Hamilton Capital Management	Columbus, Ohio	1,488.69	16.40	0.98	-9.25	28.27
143	RCL Advisors	New York, N.Y.	1,480.79	18.29	12.44	1.39	16.67
144	Camden Capital	El Segundo, Calif.	1,477.48	31.58	10.19	-31.94	93.33
145	North American Management Corp.	Boston, Mass.	1,473.00	8.23	3.22	-1.48	9.86
146	Cassaday & Company	McLean, Va.	1,472.54	13.06	1.06	-2.96	16.51
147	Delegate Advisors	San Francisco, Calif.	1,457.11	33.97	80.95	26.53	5.88
148	TrustCore Financial Services	Brentwood, Tenn.	1,450.20	11.81	1.28	3.51	8.02
149	Strategic Wealth Partners Group	Deerfield, Ill.	1,447.98	15.01	3.96	3.38	11.25
150	Accredited Investors	Minneapolis, Minn.	1,446.27	5.02	3.62	5.02	0.00
151	Morton Capital Management	Calabasas, Calif.	1,442.78	9.20	1.91	-1.62	11.00
152	LLBH Private Wealth Management	Westport, Conn.	1,438.65	18.16	5.43	-13.50	36.60
153	CM Wealth Advisors	Pepper Pike, Ohio	1,437.00	0.63	19.68	-13.15	15.87
154	Keel Point	Huntsville, Ala.	1,429.88	358.54	1.79	186.59	60.00
155	Filament	Seattle, Wash.	1,423.00	5.72	21.89	-2.41	8.33

\* Discretionary and nondiscretionary AUM reported on Form ADV. \*\* Average assets per client relationship. NM = not meaningful.

This copy is for your personal, non-commercial use only. Reproductions and distribution of this news story are strictly prohibited. For reprints of the PDF contact Susanna Marra at 732-450-8866 ext 24, susanna@fa-mag.com

2014 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)*	% GROWTH IN ASSETS 2013-2014	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
156	SJS Investment Services	Sylvania, Ohio	1,400.00	7.44	2.55	1.58	5.77
157	Pinnacle Advisory Group	Columbia, Md.	1,400.00	40.00	1.56	30.82	7.02
158	WaterOak Advisors	Winter Park, Fla.	1,381.00	10.98	2.84	10.52	0.41
159	Klingman & Associates	New York, N.Y.	1,342.65	25.13	4.48	18.87	5.26
160	Highline Wealth Management	Rockville, Md.	1,342.60	0.58	6.22	-4.08	4.85
161	Family Management Corporation	New York, N.Y.	1,341.58	5.42	2.98	33.77	-21.19
162	Aureus Asset Management	Boston, Mass.	1,335.00	52.57	19.07	30.78	16.67
163	Radnor Financial Advisors	Wayne, Pa.	1,334.60	-0.96	5.11	2.83	-3.69
164	Resource Consulting Group	Orlando, Fla.	1,319.52	4.53	3.53	0.62	3.89
165	IPI Wealth Management	Decatur, Ill.	1,311.63	19.90	0.25	23.68	-3.06
166	GV Financial Advisors	Atlanta, Ga.	1,301.60	9.93	2.37	0.94	8.91
167	Balentine	Atlanta, Ga.	1,293.50	2.54	6.31	8.04	-5.09
168	Financial Clarity	Mountain View, Calif.	1,287.49	1.70	41.53	1.70	0.00
169	Stevens Foster	Bloomington, Minn.	1,285.00	27.86	2.86	20.76	5.88
170	JFS Wealth Advisors	Hermitage, Pa.	1,284.39	-10.44	1.22	-2.59	-8.06
171	True North Advisors	Dallas, Texas	1,280.72	18.31	2.61	2.86	15.02
172	Covenant	San Antonio, Texas	1,265.00	-2.69	5.75	-11.54	10.00
173	Palisades Hudson Asset Management	Fort Lauderdale, Fla.	1,264.31	0.78	13.45	-0.29	1.08
174	Bridgewater Advisors	New York, N.Y.	1,261.53	6.74	3.35	5.32	1.34
175	Whitnell & Co.	Oak Brook, Ill.	1,239.83	8.17	3.35	2.32	5.71
176	Courier Capital Corporation	Buffalo, N.Y.	1,226.97	3.55	1.73	0.63	2.90
177	Frontier Wealth Management	Kansas City, Mo.	1,226.00	155.95	1.04	98.47	28.96
178	Carlson Capital Management	Northfield, Minn.	1,225.73	4.18	1.77	-2.74	7.11
179	Brightworth	Atlanta, Ga.	1,205.94	11.91	2.48	-1.42	13.52
180	FCE Group	Great Neck, N.Y.	1,199.56	9.68	2.40	-12.26	25.00
181	Golub Group	San Mateo, Calif.	1,182.20	16.59	1.27	7.48	8.48
182	ProVise Management Group	Clearwater, Fla.	1,180.00	20.04	1.24	1.95	17.74
183	Kovack Advisors	Ft. Lauderdale, Fla.	1,172.00	28.24	0.27	7.84	18.92
184	Altfest Personal Wealth Management	New York, N.Y.	1,167.31	7.80	2.05	3.45	4.20
185	Sheaff Brock Investment Advisors	Indianapolis, Ind.	1,156.00	86.14	0.63	11.68	66.67
186	Singer Xenos Wealth Management	Coral Gables, Fla.	1,146.09	2.29	2.08	-3.29	5.77
187	Mission Wealth Management	Santa Barbara, Calif.	1,133.99	25.57	1.78	7.01	17.34
188	The Pacific Financial Group	Bellevue, Wash.	1,124.21	33.99	0.12	8.06	24.01
189	Horter Investment Management	Cincinnati, Ohio	1,118.72	59.78	0.14	4.62	52.72
190	Arlington Partners	Birmingham, Ala.	1,110.43	-9.71	13.38	-5.36	-4.60
191	Atlanta Capital Group	Atlanta, Ga.	1,109.75	8.84	1.39	-11.57	23.08
192	IFAM Capital	Greenwood Village, Colo.	1,103.98	NM	1.30	NM	NM
193	HHG & Company	Darien, Conn.	1,083.29	1.27	3.33	1.27	0.00
194	ARGI Financial Group	Louisville, Ky.	1,068.12	41.40	0.46	-8.17	53.97
195	Lee Financial Corporation	Dallas, Texas	1,063.67	2.28	2.86	0.08	2.20
196	Bragg Financial Advisors	Charlotte, N.C.	1,059.53	10.29	1.93	0.27	10.00
197	Guyasuta Investment Advisors	Pittsburgh, Pa.	1,052.55	6.94	4.00	1.25	5.62
198	Advisors Capital Management	Ridgewood, N.J.	1,052.35	37.78	0.55	8.77	26.67
199	Avondale Partners	Nashville, Tenn.	1,047.50	14.36	4.16	-9.70	26.63
200	Fairway Wealth Management	Independence, Ohio	1,043.50	13.79	6.96	0.90	12.78
201	Atlas Private Wealth Management	North Adams, Mass.	1,039.14	72.14	0.58	29.11	33.33
202	West Financial Services	McLean, Va.	1,013.47	2.93	1.72	-0.91	3.87
203	Foster & Motley	Cincinnati, Ohio	1,013.34	10.97	2.27	5.99	4.69

### ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION

204	Sadoff Investment Management	Milwaukee, Wis.	997.95	17.95	1.69	14.96	2.60
205	Schneider Downs Wealth Management Advisors, LP	Pittsburgh, Pa.	977.49	2.74	1.97	-7.18	10.69

\* Discretionary and nondiscretionary AUM reported on Form ADV. \*\* Average assets per client relationship. NM = not meaningful.

This copy is for your personal, non-commercial use only. Reproductions and distribution of this news story are strictly prohibited. For reprints of the PDF contact Susanna Marra at 732-450-8866 ext 24, susanna@fa-mag.com

2014 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)*	% GROWTH IN ASSETS 2013-2014	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
206	Sargent Bickham Lagudis	Boulder, Colo.	957.24	8.59	2.26	-0.63	9.28
207	Heritage Financial Services	Westwood, Mass.	955.97	14.15	1.40	13.15	0.89
208	WESCAP Group	Burbank, Calif.	920.06	3.13	2.02	1.77	1.33
209	Durbin Bennett Private Wealth Management	Austin, Texas	918.46	5.90	4.99	-10.79	18.71
210	CPS Investment Advisors	Lakeland, Fla.	915.98	21.35	0.53	55.21	-21.82
211	SFMG Wealth Advisors	Plano, Texas	915.46	27.44	1.70	-6.50	36.29
212	Annex Wealth Management	Elm Grove, Wis.	913.76	24.24	0.28	5.54	17.72
213	Condor Capital Management	Martinsville, N.J.	911.34	19.05	1.31	15.98	2.65
214	Summit Financial Strategies	Columbus, Ohio	900.23	10.50	1.47	-0.15	10.67
215	Albion Financial Group	Salt Lake City, Utah	895.72	7.52	1.87	3.04	4.35
216	Braver Wealth Management	Needham, Mass.	894.37	11.78	1.67	-0.74	12.61
217	Financial Advisory Service	Leawood, Kan.	893.11	11.64	1.15	0.19	11.43
218	Private Ocean Wealth Management	San Rafael, Calif.	890.00	6.33	2.13	7.10	-0.71
219	Stonebridge Capital Advisors	St. Paul, Minn.	883.52	6.56	0.74	-1.16	7.82
220	The Harbor Group	Bedford, N.H.	876.16	-8.12	1.49	-14.99	8.09
221	Ohana Advisors	San Rafael, Calif.	830.31	-1.43	69.19	-9.64	9.09
222	Huber Financial Advisors	Lincolnshire, Ill.	828.93	5.61	0.92	5.61	0.00
223	Resnick Advisors	Westport, Conn.	822.44	1.05	0.90	0.94	0.11
224	Jackson Thornton Asset Management	Montgomery, Ala.	821.36	5.64	1.55	-4.91	11.09
225	Compass Capital Management	Minneapolis, Minn.	819.27	10.18	3.96	6.45	3.50
226	Washington Wealth Management	San Diego, Calif.	818.24	-20.62	0.26	-21.11	0.61
227	AEPG Wealth Strategies	Warren, N.J.	815.52	4.66	1.85	2.06	2.55
228	McKinley Carter Wealth Services	Wheeling, W.Va.	811.25	-0.50	1.10	17.37	-15.22
229	Novare Capital Management	Charlotte, N.C.	804.44	15.69	3.35	7.01	8.11
230	Glassman Wealth Services	McLean, Va.	796.61	8.30	3.28	-4.18	13.02
231	Larson Financial	St. Louis, Mo.	792.62	110.17	0.33	31.36	60.00
232	Park Place Capital Management	Milwaukee, Wis.	790.91	82.60	8.69	22.40	49.18
233	Fusion Family Wealth	Woodbury, N.Y.	779.67	3.49	3.90	3.49	0.00
234	EFS Advisors	Cambridge, Minn.	775.98	9.20	0.08	9.20	0.00
235	Oakwood Capital Management	Los Angeles, Calif.	775.48	9.87	1.89	0.52	9.31
236	Spero-Smith Investment Advisers	Cleveland, Ohio	775.26	-4.14	2.42	-9.83	6.31
237	CFS Investment Advisory Services	Totowa, N.J.	753.79	16.45	1.91	13.79	2.34
238	BLB&B Advisors	Ambler, Pa.	748.90	11.90	0.99	134.40	-52.26
239	Center for Financial Planning	Southfield, Mich.	742.80	8.76	0.87	1.21	7.46
240	The Investment Counsel Company	Las Vegas, Nev.	741.62	4.39	3.42	-6.20	11.28
241	Sharkey, Howes & Javer	Denver, Colo.	740.00	1.37	0.61	-1.58	2.99
242	Wacker Wealth Partners	San Luis Obispo, Calif.	737.01	6.74	1.33	3.27	3.36
243	Meyer Capital Group	Marlton, N.J.	737.00	6.04	1.01	2.25	3.71
244	Beaird Harris Wealth Management	Dallas, Texas	736.25	12.12	1.84	3.99	7.82
245	Sapient Private Wealth Management	Eugene, Ore.	734.50	17.73	1.75	0.91	16.67
246	LeafHouse Financial Advisors	Austin, Texas	721.10	128.99	5.77	183.95	-19.35
247	Parallel Advisors	San Francisco, Calif.	715.44	41.82	0.79	-5.45	50.00
248	Paragon Capital Management	Denver, Colo.	711.11	0.72	5.27	4.45	-3.57
249	Cookson Peirce Wealth Management	Pittsburgh, Pa.	709.27	20.89	2.68	8.11	11.81
250	The Advisory Group of San Francisco	San Francisco, Calif.	705.99	-0.18	4.10	-1.34	1.18
251	Bridgewater Wealth & Financial Management	Bethesda, Md.	702.94	49.70	2.77	28.49	16.51
252	Gradient Investments	Arden Hills, Minn.	696.72	55.75	0.15	6.59	46.13
253	Lutz Financial	Omaha, Neb.	695.38	13.63	1.35	0.88	12.64
254	Warwick Partners	Bryan, Texas	686.43	18.96	5.01	30.25	-8.67
255	Regal Investment Advisors	Kentwood, Mich.	672.49	16.81	0.20	0.80	15.88
256	Relyea Zuckerberg Hanson	Stamford, Conn.	648.00	20.45	5.94	10.50	9.00
257	Kings Point Capital Management	Brentwood, Tenn.	638.22	13.15	5.23	2.02	10.91

\* Discretionary and nondiscretionary AUM reported on Form ADV. \*\* Average assets per client relationship. NM = not meaningful.

This copy is for your personal, non-commercial use only. Reproductions and distribution of this news story are strictly prohibited. For reprints of the PDF contact Susanna Marra at 732-450-8866 ext 24, susanna@fa-mag.com

# FA's 2015 RIA RANKING

2014 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)*	% GROWTH IN ASSETS 2013-2014	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
258	Retirement Design & Management	Westport, Conn.	635.75	11.55	1.50	7.62	3.66
259	The Mather Group	Oakbrook Terrace, Ill.	625.74	43.65	1.39	14.92	25.00
260	Austin Asset	Austin, Texas	624.00	8.47	1.90	4.84	3.47
261	Versant Capital Management	Phoenix, Ariz.	621.20	2.24	2.50	-9.71	13.24
262	Leonetti & Associates	Buffalo Grove, Ill.	615.12	5.20	1.49	5.20	0.00
263	Wealthquest	Cincinnati, Ohio	608.27	6.88	0.71	5.76	1.06
264	Mosaic Financial Partners	San Francisco, Calif.	605.30	5.09	2.28	3.90	1.15
265	Lexington Wealth Management	Lexington, Mass.	593.00	2.60	1.89	-14.40	19.85
266	Bitterroot Capital Advisors	Bozeman, Mont.	592.42	-10.82	65.82	-10.82	0.00
267	Doyle Wealth Management	St. Petersburg, Fla.	591.45	18.78	1.16	9.47	8.51
268	Rodgers & Associates	Lancaster, Pa.	591.19	10.59	1.29	3.09	7.28
269	ERISA Fiduciary Advisors	Weston, Fla.	589.98	7.98	15.95	-0.77	8.82
270	Cornerstone Institutional Investors	Bethlehem, Pa.	589.68	10.45	1.55	15.96	-4.75
271	ML&R Wealth Management	Austin, Texas	589.37	8.36	2.05	-2.59	11.24
272	Heller Capital Resources	Los Angeles, Calif.	587.14	9.10	2.14	-6.77	17.02
273	Hokanson Associates	Solana Beach, Calif.	579.12	1.92	2.01	0.50	1.41
274	Van Hulzen Asset Management	El Dorado Hills, Calif.	575.00	45.20	1.55	29.50	12.12
275	GM Advisory Group	Melville, N.Y.	574.25	4.89	1.91	-4.55	9.89
276	JoycePayne Partners	Richmond, Va.	571.39	4.71	1.90	-0.52	5.26
277	StrategicPoint Investment Advisors	Providence, R.I.	566.71	7.47	0.71	10.15	-2.43
278	Confluence Wealth Management	Portland, Ore.	561.20	47.68	1.42	14.32	29.18
279	Valley National Financial Advisors	Bethlehem, Pa.	555.94	12.54	0.46	8.14	4.08
280	The H Group	Portland, Ore.	551.00	-3.37	0.62	-8.29	5.37
281	Marble Harbor Investment Counsel	Boston, Mass.	550.00	10.44	6.88	-3.36	14.29
282	Petersen Hastings Investment Management	Kennewick, Wash.	538.88	2.45	1.06	-19.25	26.87
283	Kinsight	Birmingham, Ala.	537.41	0.40	2.13	-39.44	65.79
284	Vivaldi Capital Management	Northfield, Ill.	531.47	26.17	3.54	-15.89	50.00
285	McGowan Group Asset Management	Dallas, Texas	530.61	12.79	0.85	5.72	6.69
286	Yeske Buie	San Francisco, Calif.	529.43	5.53	2.22	1.55	3.91
287	SilverOak Wealth Management	Edina, Minn.	527.52	7.72	2.27	-2.03	9.95
288	Patton Albertson & Miller	Chattanooga, Tenn.	525.67	1.82	1.86	0.01	1.81
289	American Financial Advisors	Marietta, Ga.	525.00	12.90	0.53	5.00	7.53
290	Weatherly Asset Management	Del Mar, Calif.	524.85	19.22	1.85	13.35	5.19
291	Pinnacle Wealth Planning Services	Mansfield, Ohio	524.76	5.56	1.14	5.33	0.22
292	Briaud Financial Advisors	College Station, Texas	503.93	6.81	1.95	1.43	5.31
293	Quadrant Private Wealth	Bethlehem, Pa.	500.00	NM	1.43	NM	NM

## ASSET CATEGORY: \$300 MILLION TO <\$500 MILLION

294	St. Clair Advisors	Cleveland, Ohio	499.08	12.21	8.32	2.86	9.09
295	Lucia Wealth Services	San Diego, Calif.	498.81	27.51	0.16	11.06	14.81
296	Hudock Capital Group	Williamsport, Pa.	492.11	-3.38	0.77	-12.51	10.43
297	Meg Green & Associates	Miami, Fla.	481.89	19.47	1.61	7.52	11.11
298	Financial Synergies Asset Management	Houston, Texas	477.80	8.10	1.48	0.71	7.33
299	Advisor Financial Services	Woodstock, Ga.	473.15	41.76	0.51	37.95	2.76
300	Montis Financial	Waltham, Mass.	471.00	6.80	2.45	-4.32	11.63
301	PDS Planning	Columbus, Ohio	470.00	15.20	1.03	10.91	3.86
302	Cornerstone Advisory	Baltimore, Md.	468.74	11.56	1.11	-18.05	36.13
303	ACG Advisory Services	Midlothian, Va.	468.32	9.93	1.97	6.70	3.03
304	Alexandria Capital	Alexandria, Va.	465.00	1.09	1.64	14.26	-11.53
305	Lassus Wherley	New Providence, N.J.	465.00	9.16	1.35	3.45	5.52
306	Syntal Capital Partners	Midland, Texas	464.20	98.38	4.64	78.54	11.11
307	Cable Hill Partners	Portland, Ore.	461.30	NM	1.85	NM	NM

\* Discretionary and nondiscretionary AUM reported on Form ADV. \*\* Average assets per client relationship. NM = not meaningful.

This copy is for your personal, non-commercial use only. Reproductions and distribution of this news story are strictly prohibited. For reprints of the PDF contact Susanna Marra at 732-450-8866 ext 24, susanna@fa-mag.com

2014 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)*	% GROWTH IN ASSETS 2013-2014	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
308	Segment Wealth Management	Houston, Texas	460.82	-1.95	3.34	-10.48	9.52
309	Grant Street Asset Management	Canonsburg, Pa.	458.18	10.26	1.75	4.36	5.65
310	Trustmont Advisory Group	Greensburg, Pa.	457.00	0.00	0.11	-2.33	2.38
311	Horan Capital Management	Hunt Valley, Md.	456.63	2.18	0.59	5.74	-3.37
312	Janiczek Wealth Management	Greenwood Village, Colo.	450.24	6.06	2.43	-4.83	11.45
313	PJS Investment Management	Cedarburg, Wis.	448.90	3.41	1.85	-2.97	6.58
314	Wagner Wealth Management	Denver, Colo.	447.92	11.71	1.83	8.52	2.94
315	Comprehensive Investment Solutions	Yardley, Pa.	444.09	6.98	1.61	1.15	5.77
316	Madison Wealth Management	Cincinnati, Ohio	441.96	8.32	2.39	3.05	5.11
317	Paragon Capital Management	Overland Park, Kan.	437.77	18.96	1.40	12.48	5.76
318	Aveo Capital Partners	Greenwood Village, Colo.	435.78	43.08	0.64	-40.59	140.85
319	Blankinship & Foster	Solana Beach, Calif.	433.00	9.34	1.95	10.82	-1.33
320	Inverness Holdings	Beachwood, Ohio	431.19	20.05	1.39	28.57	-6.63
321	Southern Financial Group	Birmingham, Ala.	428.05	20.75	0.47	14.47	5.48
322	Scarborough Capital Management	Annapolis, Md.	422.09	-26.59	0.11	-30.26	5.26
323	The Sterling Group Advisors	Pasadena, Calif.	421.99	10.33	0.95	6.62	3.49
324	Concentus Wealth Advisors	King of Prussia, Pa.	420.00	NM	2.15	NM	NM
325	Lara, May & Associates	Falls Church, Va.	419.37	13.43	0.29	5.91	7.10
326	Delphi Private Advisors	San Diego, Calif.	419.15	8.97	2.85	20.09	-9.26
327	Sather Financial Group	Victoria, Texas	415.11	14.67	1.58	8.98	5.22
328	Advocacy Wealth Management	Atlanta, Ga.	415.00	50.91	0.83	20.73	25.00
329	GDM Advisory Group	Jenkintown, Pa.	411.00	0.24	1.64	-7.78	8.70
330	ARS Wealth Advisors	Saint Petersburg, Fla.	408.85	34.60	1.21	25.41	7.32
331	FJY Financial	Reston, Va.	406.68	-0.88	1.35	-14.71	16.22
332	Triad Financial Advisors	Greensboro, N.C.	406.20	7.75	0.73	3.88	3.72
333	Platinum Wealth Partners	Tampa, Fla.	405.00	102.50	0.41	102.50	0.00
334	Evermay Wealth Management	Arlington, Va.	401.80	16.94	1.94	6.77	9.52
335	Traphagen Financial Group	Oradell, N.J.	401.68	13.51	0.39	8.83	4.30
336	Summit Financial Wealth Advisors	Lafayette, La.	400.84	14.48	0.77	1.93	12.31
337	CRA Financial	Northfield, N.J.	394.52	24.42	0.89	10.03	13.08
338	Roof Advisory Group	Harrisburg, Pa.	388.19	17.93	1.92	8.59	8.60
339	Wealth Health	Roseland, N.J.	385.46	79.72	1.93	-28.11	150.00
340	Ensemble Capital Management	Burlingame, Calif.	381.11	19.64	3.85	2.72	16.47
341	Redwood Wealth Management	Alpharetta, Ga.	375.97	5.60	0.71	1.39	4.15
342	J.P. King Advisors	Walnut Creek, Calif.	375.00	14.93	1.39	-12.74	31.71
343	KeatsConnelly	Phoenix, Ariz.	374.96	27.37	3.12	25.25	1.69
344	Moisand Fitzgerald Tamayo	Orlando, Fla.	373.81	12.54	0.95	1.09	11.33
345	Lodestar Private Asset Management	Alamo, Calif.	369.50	2.69	1.99	0.49	2.20
346	Quadrant Capital Management	Fairfield, N.J.	369.25	10.15	3.10	8.30	1.71
347	RS Crum	Newport Beach, Calif.	367.96	5.44	1.96	0.95	4.44
348	Asset Management Advisors	Houston, Texas	365.00	20.07	5.07	10.06	9.09
349	HFI Wealth Management	Shepherdstown, W.Va.	360.72	9.76	1.07	-0.95	10.82
350	Vintage Financial Services	Ann Arbor, Mich.	357.77	14.51	0.98	0.40	14.06
351	Kuntz Leshner Capital	Lancaster, Pa.	356.61	19.80	0.77	7.66	11.27
352	WNY Asset Management	Williamsville, N.Y.	351.65	8.17	0.22	8.17	0.00
353	Archford Capital Strategies	Swansea, Ill.	349.45	25.88	1.08	16.20	8.33
354	Heller Wealth Advisors	Summit, N.J.	348.99	15.34	1.82	11.13	3.78
355	Financial Management Group	Cincinnati, Ohio	348.61	11.73	1.17	4.99	6.43
356	WorthPointe	Austin, Texas	345.00	18.97	0.99	10.47	7.69
357	Oak City Consulting	Raleigh, N.C.	343.88	0.00	6.88	-10.00	11.11
358	Hemington Wealth Management	Tysons, Va.	340.00	100.00	1.70	20.00	66.67
359	Financial Planning and Information Services	De Pere, Wis.	338.00	10.82	0.45	1.95	8.70

\* Discretionary and nondiscretionary AUM reported on Form ADV. \*\* Average assets per client relationship. NM = not meaningful.

This copy is for your personal, non-commercial use only. Reproductions and distribution of this news story are strictly prohibited.  
 For reprints of the PDF contact Susanna Marra at 732-450-8866 ext 24, susanna@fa-mag.com



2014 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)*	% GROWTH IN ASSETS 2013-2014	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
360	Schiavi + Dattani	Wilmington, Del.	337.33	4.35	2.20	2.98	1.32
361	Absolute Capital Management	Pittsburgh, Pa.	336.36	3.49	0.14	-0.82	4.35
362	Asset Management Group	Stamford, Conn.	335.47	17.73	1.16	16.51	1.05
363	MPI Investment Management	Hinsdale, Ill.	335.24	9.92	2.68	10.80	-0.79
364	Droms Strauss Wealth Mangement	St. Louis, Mo.	334.75	7.98	1.34	-0.65	8.70
365	Ruggie Wealth Management	Tavares, Fla.	332.00	16.08	0.94	-5.95	23.43
366	WNA Wealth Advisors	Hinsdale, Ill.	331.74	8.92	0.87	3.18	5.56
367	LVZ Advisors	Holland, Mich.	331.19	10.42	0.25	5.59	4.58
368	Capital Fiduciary Advisors	Reston, Va.	330.47	4.97	2.43	-22.82	36.00
369	GSK Wealth Advisors	Hollywood, Fla.	330.00	10.00	1.00	0.00	10.00
370	Gitterman Wealth Management	Iselin, N.J.	328.20	4.19	0.60	-10.02	15.79
371	Porter White Investment Advisors	Birmingham, Ala.	327.73	18.64	3.86	6.08	11.84
372	FAI Wealth Management	Columbia, Md.	320.42	-2.97	1.56	6.02	-8.48
373	Rappaport Reiches Capital Management	Skokie, Ill.	320.19	18.95	1.52	6.54	11.64
374	The L. Warner Companies	Timonium, Md.	318.37	5.03	1.43	2.20	2.76
375	Burton Enright Welch	Walnut Creek, Calif.	317.60	13.94	1.14	8.20	5.30
376	Salem Partners Advisors	Los Angeles, Calif.	312.03	9.28	11.14	1.47	7.69
377	Bernhardt Wealth Management	McLean, Va.	311.75	11.75	1.82	5.22	6.21
378	Bedrock Capital Management	Los Altos, Calif.	310.42	18.56	2.07	-0.41	19.05
379	GFS Private Wealth	Clearwater, Fla.	308.23	6.46	2.47	3.05	3.31
380	Investmark Advisory Group	Stratford, Conn.	308.00	30.51	0.68	36.31	-4.26
381	Ellis Investment Partners	Berwyn, Pa.	302.09	-4.58	0.87	-7.31	2.95
382	TGS Financial Advisors	Radnor, Pa.	300.61	11.19	1.43	5.90	5.00

## ASSET CATEGORY: \$100 MILLION TO <\$300 MILLION

383	Insight Wealth Partners	Plano, Texas	298.58	13.01	0.70	6.69	5.93
384	Financial Management Strategies	Valley View, Ohio	298.32	45.11	0.47	-6.21	54.72
385	Anthony Smith Advisors	Atlanta, Ga.	297.94	34.27	1.92	15.21	16.54
386	Goodman Financial Corporation	Houston, Texas	292.67	0.23	1.46	-9.79	11.11
387	Avant-Garde Advisors	Centennial, Colo.	291.42	4.77	0.75	-0.63	5.43
388	MACRO Consulting Group	Parsippany, N.J.	290.00	5.07	0.71	-11.80	19.13
389	Aldebaran Financial	Kingsport, Tenn.	283.00	6.79	1.03	-12.62	22.22
390	Bouchev Financial Group	Troy, N.Y.	282.12	24.11	0.71	-6.92	33.33
391	Jentner Wealth Management	Akron, Ohio	280.59	23.07	1.52	-4.87	29.37
392	Glass Jacobson Investment Advisors	Owings Mills, Md.	277.16	6.63	0.72	-1.70	8.47
393	William Mack & Associates	Troy, Mich.	276.45	6.69	0.35	0.83	5.81
394	Birchwood Financial Partners	Edina, Minn.	276.09	8.50	0.76	2.83	5.51
395	Winch Financial	Appleton, Wis.	273.22	19.47	0.37	2.50	16.56
396	Wechter Feldman Wealth Management	Parsippany, N.J.	272.52	7.82	1.70	4.45	3.23
397	Schroeder, Braxton & Vogt	Amherst, N.Y.	271.74	-0.72	0.53	-1.89	1.19
398	KMH Wealth Management	Victoria, Texas	269.65	20.83	0.88	10.13	9.71
399	J. W. Coons Advisors	Columbus, Ohio	268.87	7.45	2.80	-5.98	14.29
400	Richmond Brothers	Jackson, Mich.	267.91	16.58	0.40	7.57	8.37
401	Rowling & Associates	San Diego, Calif.	261.14	3.80	0.87	1.38	2.39
402	WheelerFrost Wealth Managers	San Diego, Calif.	257.30	11.46	0.96	-4.40	16.59
403	Matrix Wealth Advisors	Charlotte, N.C.	255.92	8.36	1.82	11.44	-2.76
404	Oarsman Capital	Milwaukee, Wis.	255.00	16.44	0.64	1.88	14.29
405	AM Global Family Investment Office	West Palm Beach, Fla.	254.60	12.25	15.91	-29.84	60.00
406	Hochman Cole Investment Advisors	Deerfield, Ill.	252.73	13.26	2.09	2.02	11.01
407	De Groote Financial Group	Westlake Village, Calif.	250.00	10.13	1.52	2.79	7.14
408	Net Worth Advisory Group	Sandy, Utah	249.43	20.96	0.60	6.78	13.28
409	Capital Wealth Advisors	Naples, Fla.	249.13	7364.17	1.46	118.25	3320.00

\* Discretionary and nondiscretionary AUM reported on Form ADV. \*\* Average assets per client relationship. NM = not meaningful.

This copy is for your personal, non-commercial use only. Reproductions and distribution of this news story are strictly prohibited. For reprints of the PDF contact Susanna Marra at 732-450-8866 ext 24, susanna@fa-mag.com

2014 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)*	% GROWTH IN ASSETS 2013-2014	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
410	BlueSky Wealth Advisors	New Bern, N.C.	247.00	17.62	1.13	4.73	12.31
411	American Wealth Management	Reno, Nev.	245.71	5.58	0.26	-0.54	6.16
412	Mark J. Snyder Financial Services	Medford, N.Y.	244.83	3.81	0.46	2.24	1.53
413	Cambridge Wealth Counsel	Atlanta, Ga.	244.37	18.67	1.48	5.73	12.24
414	Steffes Financial	Overland Park, Kan.	239.20	14.01	0.96	4.89	8.70
415	AJ Wealth	New York, N.Y.	236.13	164.57	2.15	116.47	22.22
416	Camarda Wealth Advisory Group	Fleming Island, Fla.	236.01	10.64	0.18	12.89	-2.00
417	Mark Sheptoff Financial Planning	Glastonbury, Conn.	236.00	4.89	1.21	-1.03	5.98
418	DCA Global Wealth Management	Norcross, Ga.	235.01	2.91	2.04	5.59	-2.54
419	Etesian Wealth Advisors	Lake Oswego, Ore.	232.27	-27.31	1.65	-38.14	17.50
420	Pinnacle Financial Group	Western Springs, Ill.	230.00	15.00	0.84	-1.73	17.02
421	Personal Financial Group	Overland Park, Kan.	228.98	21.51	0.16	8.94	11.54
422	Millares Asset Management	Coral Gables, Fla.	227.94	145.12	5.18	55.99	57.14
423	PacWest Financial Management	Phoenix, Ariz.	225.21	10.53	1.25	4.39	5.88
424	Branson, Fowlkes & Company	Houston, Texas	225.00	8.70	1.50	1.45	7.14
425	Horan Capital Advisors	Cincinnati, Ohio	224.00	23.08	1.87	2.56	20.00
426	Latitude Advisors	Vero Beach, Fla.	220.16	-1.91	0.15	-7.39	5.92
427	Clune & Associates	Chicago, Ill.	219.42	11.38	1.70	1.88	9.32
428	The Financial Enhancement Group	Anderson, Ind.	219.00	0.00	0.41	-4.26	4.45
429	Allodium Investment Consultants	Minneapolis, Minn.	218.77	6.05	1.92	-3.26	9.62
430	Lakeside Advisors	Seattle, Wash.	216.03	2.68	0.43	1.87	0.80
431	McCarthy Asset Management	Redwood Shores, Calif.	215.43	24.51	1.03	19.15	4.50
432	Court Place Advisors	Ellicott City, Md.	211.44	11.49	0.87	10.11	1.26
433	Trinity Financial Advisors	Chicago, Ill.	210.08	21.09	3.23	15.50	4.84
434	1st Portfolio Wealth Advisors	Fairfax, Va.	210.00	37.25	1.26	19.17	15.17
435	Titleist Asset Management	San Antonio, Texas	210.00	40.00	0.53	31.25	6.67
436	Piershale Financial Group	Crystal Lake, Ill.	209.46	12.13	0.52	19.14	-5.88
437	Blue Ocean Strategic Capital	Syracuse, N.Y.	209.26	1.59	0.49	0.17	1.42
438	Next Generation Wealth Management	Milwaukee, Wis.	208.57	12.38	1.11	-44.41	102.15
439	Andrews, Lucia Wealth Management	San Mateo, Calif.	205.31	7.82	1.75	1.37	6.36
440	Horizon Advisors	Houston, Texas	203.69	-11.74	1.84	-10.94	-0.89
441	Mutual Fund Management Co.	Troy, Mich.	203.65	1.55	0.70	-1.25	2.84
442	Burns Matteson Capital Management	Corning, N.Y.	202.06	6.59	1.07	2.08	4.42
443	Align Wealth Management	Oklahoma City, Okla.	201.64	10.97	1.30	-6.93	19.23
444	Poehling Capital Management	Madison, Wis.	199.90	1.83	0.59	-2.66	4.62
445	Paragon Financial Advisors	College Station, Texas	199.16	14.16	1.40	1.30	12.70
446	Hefty Wealth Partners	Auburn, Ind.	198.53	13.77	0.43	8.63	4.73
447	Tull Financial Group	Chesapeake, Va.	197.00	5.91	0.85	3.19	2.64
448	Kyle Financial Services	Milwaukee, Wis.	196.21	4.84	1.96	-5.64	11.11
449	Robert A. Mecca & Associates	Hoffman Estates, Ill.	193.00	9.04	0.67	-1.18	10.34
450	Technomart Investment Advisors	Baltimore, Md.	192.62	-6.99	2.32	-11.47	5.06
451	Baron Financial Group	Fair Lawn, N.J.	192.00	2.13	0.77	-14.21	19.05
452	Investment Advisory Professionals	Boca Raton, Fla.	189.00	6.78	1.99	1.16	5.56
453	Covenant Wealth Advisors	Williamsburg, Va.	186.58	42.54	1.28	8.37	31.53
454	Precipio Wealth Management	McLean, Va.	186.06	12.13	1.86	-4.69	17.65
455	Fortune Wealth Management	Dallas, Texas	185.00	6.94	0.93	-0.08	7.03
456	Reston Wealth Management	Reston, Va.	184.97	9.68	0.53	-20.03	37.15
457	IronGate Partners	Wilmington, N.C.	183.56	11.25	0.61	3.83	7.14
458	Cypress Advisory Services	Houston, Texas	183.55	7.70	1.82	15.17	-6.48
459	Asset Planning	Cypress, Calif.	183.42	14.60	0.82	6.96	7.14
460	Smedley Financial Services	Salt Lake City, Utah	182.00	13.03	0.22	11.55	1.32
461	Grand Wealth Management	Grand Rapids, Mich.	181.88	27.00	2.43	18.53	7.14

\* Discretionary and nondiscretionary AUM reported on Form ADV. \*\* Average assets per client relationship. NM = not meaningful.

This copy is for your personal, non-commercial use only. Reproductions and distribution of this news story are strictly prohibited.  
 For reprints of the PDF contact Susanna Marra at 732-450-8866 ext 24, susanna@fa-mag.com

2014 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)*	% GROWTH IN ASSETS 2013-2014	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
462	Century Wealth Management	Memphis, Tenn.	181.58	0.68	4.13	-15.33	18.92
463	Lamia Financial Group	Thousand Oaks, Calif.	179.72	9.23	0.88	2.27	6.81
464	Armor Investment Advisors	Raleigh, N.C.	177.75	3.77	1.32	-1.62	5.47
465	Netting & Pace, CPAs	San Antonio, Texas	177.71	7.66	2.96	4.08	3.45
466	The Advisory Group	Diamond Bar, Calif.	176.63	5.14	0.33	-1.18	6.39
467	QP Consulting	Takoma Park, Md.	175.61	14.01	3.99	-22.27	46.67
468	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	175.00	21.53	0.59	9.21	11.28
469	The Lubitz Financial Group	Miami, Fla.	175.00	6.05	1.56	-0.58	6.67
470	Hines Warner Wealth Management	Portland, Ore.	173.36	11.50	1.25	2.68	8.59
471	Family Wealth Advisory Group	Cincinnati, Ohio	172.48	13.39	1.26	15.87	-2.14
472	Heron Financial Group   Wealth Advisors	New York, N.Y.	171.00	28.57	1.97	25.62	2.35
473	RPH Financial Services	Stroudsburg, Pa.	170.58	11.67	1.46	9.76	1.74
474	MDK Financial Group	Houston, Texas	170.00	27.82	0.32	21.73	5.00
475	Claro Advisors	Boston, Mass.	169.98	77.06	0.85	32.80	33.33
476	Searcy Financial Services	Overland Park, Kan.	169.82	13.66	1.26	10.29	3.05
477	Asset Planning Corporation	Knoxville, Tenn.	169.04	5.17	1.12	0.99	4.14
478	Socius Family Office	Boca Raton, Fla.	168.41	9.13	2.28	-4.14	13.85
479	Financial Advisors Network	Tustin, Calif.	166.48	18.00	0.42	10.62	6.67
480	Gierl Augustine Investment Management	Sarver, Pa.	160.89	-4.01	0.18	-9.34	5.88
481	Sentinel Wealth Management	Reston, Va.	159.99	4.75	1.80	2.40	2.30
482	Hammond Iles Wealth Advisors	Wethersfield, Conn.	157.39	18.69	0.23	17.16	1.31
483	LJCooper Capital Management	Orem, Utah	156.93	25.11	0.39	1.94	22.73
484	Berno Financial Management	Cincinnati, Ohio	155.96	12.21	1.70	8.56	3.37
485	The Darrow Company	Concord, Mass.	154.03	2.14	1.31	5.61	-3.28
486	Miller Advisors	Kirkland, Wash.	153.98	-0.70	0.83	-4.44	3.91
487	AOG Wealth Management	Great Falls, Va.	152.40	17.87	0.96	3.78	13.57
488	Mendel Money Management	Northbrook, Ill.	151.75	8.12	1.12	4.92	3.05
489	Sard Wealth Management Group	Atlanta, Ga.	151.25	24.00	0.97	9.70	13.04
490	Heritage Way Advisors	Rockford, Ill.	151.01	10.22	1.57	2.19	7.87
491	Madrona Financial Services	Everett, Wash.	147.47	10.68	0.31	-0.97	11.76
492	Resolute Financial	Newburyport, Mass.	145.12	13.26	0.67	-5.18	19.44
493	Vellum Financial	San Luis Obispo, Calif.	143.20	29.27	0.34	-7.71	40.07
494	Palisade Investments	Stateline, Nev.	142.00	44.90	1.18	8.67	33.33
495	Core Capital Solutions	Naperville, Ill.	141.31	0.68	2.05	2.14	-1.43
496	Premier Estate Planners	Clinton Township, Mich.	141.10	4.87	0.32	2.22	2.59
497	Drum Hill Capital	Norwalk, Conn.	140.12	17.94	2.92	8.11	9.09
498	JVL Associates	Wyoming, Mich.	139.49	16.53	4.81	8.50	7.41
499	Raskob Kambourian Financial Advisors	Tucson, Ariz.	138.64	1.20	0.39	-27.31	39.22
500	Warren Financial Service	Exton, Pa.	137.37	25.59	0.54	8.29	15.98
501	Sebold Capital Management	Naperville, Ill.	134.94	16.14	1.11	9.47	6.09
502	Vermillion Financial Advisors	South Barrington, Ill.	133.52	8.61	0.81	-3.97	13.10
503	Valentine Ventures	Bend, Ore.	133.51	3.58	0.88	-1.19	4.83
504	TABR Capital Management	Orange, Calif.	133.35	-10.08	0.56	-8.57	-1.66
505	Legacy Consulting Group	Plano, Texas	132.96	2.52	1.36	-1.66	4.26
506	Rainsberger Wealth Advisors	Colorado Springs, Colo.	131.48	15.18	1.31	15.18	0.00
507	Professional Financial Strategies	Pittsford, N.Y.	130.84	8.04	1.64	9.39	-1.23
508	Euclid Investment Advisory	Bethesda, Md.	130.00	8.33	1.08	-23.26	41.18
509	Briggs Wealth Management	Glastonbury, Conn.	129.78	9.12	1.32	16.91	-6.67
510	Integrated Wealth Management	Scottsdale, Ariz.	129.35	4.85	0.38	-1.32	6.25
511	Kemp Financial Management	Fullerton, Calif.	128.85	2.25	0.79	4.13	-1.81
512	Ivy League Financial Advisors	Rockville, Md.	128.40	9.08	1.22	1.81	7.14
513	Chesney & Company	Sheldon, S.C.	127.21	18.10	2.54	18.10	0.00

\* Discretionary and nondiscretionary AUM reported on Form ADV. \*\* Average assets per client relationship. NM = not meaningful.

This copy is for your personal, non-commercial use only. Reproductions and distribution of this news story are strictly prohibited. For reprints of the PDF contact Susanna Marra at 732-450-8866 ext 24, susanna@fa-mag.com

2014 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)*	% GROWTH IN ASSETS 2013-2014	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
514	Wealthview Capital	Jackson, Miss.	126.06	18.81	0.78	7.00	11.03
515	Red Door Wealth Management	Memphis, Tenn.	124.66	21.20	0.88	-10.38	35.24
516	Waterford Advisors	Williamsville, N.Y.	123.03	15.66	0.73	36.88	-15.50
517	Focus Financial Advisors	Rockford, Ill.	122.51	10.23	0.74	8.90	1.22
518	Brown Financial Advisory	Fairhope, Ala.	121.45	12.53	0.69	2.24	10.06
519	Samalin Investment Counsel	Chappaqua, N.Y.	120.22	-15.32	0.64	-21.59	8.00
520	Marrs Wealth Management	Ames, Iowa	120.00	20.00	0.75	12.50	6.67
521	Beacon Financial Advisors	Rye Brook, N.Y.	119.24	5.57	2.77	10.48	-4.44
522	Spraker Wealth Management ♦	Maitland, Fla.	128.13	8.02	1.32	-2.00	10.23
523	Financial Management Concepts	Winter Springs, Fla.	116.35	2.21	0.79	-2.63	4.96
524	Siligmuller & Norvid Wealth Advisors	Glen Ellyn, Ill.	116.00	11.54	1.66	6.76	4.48
525	Wilson & Boucher Capital Management	Moraga, Calif.	114.82	8.87	1.09	14.06	-4.55
526	CapSouth Partners	Dothan, Ala.	114.00	8.79	0.44	-3.48	12.72
527	Novos Planning Associates	New York, N.Y.	113.76	10.07	1.75	6.68	3.17
528	Lighthouse Financial	Broomfield, Colo.	113.45	0.00	0.41	9.09	-8.33
529	Bonner & Smith	Lubbock, Texas	111.82	16.16	0.61	11.08	4.57
530	American Financial & Tax Strategies	New York, N.Y.	111.71	2.49	0.89	13.07	-9.35
531	Advisors Financial	Vienna, Va.	110.06	15.75	0.38	11.33	3.97
532	Dorman Financial Management	Maitland, Fla.	110.00	-0.63	0.33	-3.64	3.13
533	Garnet Group	Bethesda, Md.	109.68	2.71	2.55	12.26	-8.51
534	Colman Knight Advisory Group	Carlisle, Mass.	109.66	9.93	1.66	8.27	1.54
535	Crossgate Wealth Advisors	Yardley, Pa.	109.40	21.11	0.99	0.38	20.65
536	CSA Financial Advisors	Cincinnati, Ohio	108.02	53.07	0.78	51.97	0.72
537	Charleston Financial Advisors	Charleston, S.C.	106.00	13.98	0.88	15.88	-1.64
538	Alpha Financial Advisors	Charlotte, N.C.	105.24	13.17	0.82	9.63	3.23
539	Pauley Financial	Austin, Texas	103.96	14.18	2.17	40.35	-18.64
540	Summit Place Financial Advisors	Summit, N.J.	103.26	21.20	6.07	6.94	13.33
541	Sacks & Associates	Bridgewater, N.J.	102.03	-0.16	0.61	-10.33	11.33
542	Financial Guidance Group	Palm Harbor, Fla.	101.90	13.35	0.71	13.35	0.00
543	Morling Financial Advisors	San Francisco, Calif.	101.25	23.02	0.51	-7.73	33.33
544	Paragon Wealth Management	Provo, Utah	100.86	-0.09	0.71	4.84	-4.70
545	The Blakeley Group	Santa Clara, Calif.	100.00	19.05	1.32	14.35	4.11

### ASSET CATEGORY: <\$100 MILLION

546	Jarvis Financial	Federal Way, Wash.	95.00	11.76	0.64	4.26	7.19
547	Cathy Pareto and Associates	Coral Gables, Fla.	91.67	18.87	0.83	8.16	9.90
548	Clay Northam Wealth Management	Seal Beach, Calif.	90.68	16.17	0.34	11.87	3.85
549	Flagship Capital Management	Media, Pa.	88.00	16.56	0.82	14.38	1.90
550	Mission Creek Capital Partners	San Francisco, Calif.	82.02	48.91	0.93	35.37	10.00
551	Ron Beaton's Money Matters	Paducah, Ky.	80.88	17.21	1.35	9.40	7.14
552	BrightPath Wealth Planning	Santa Barbara, Calif.	78.25	18.01	0.84	4.05	13.41
553	Sage Future Financial	Albuquerque, N.M.	77.58	3.10	1.94	-2.06	5.26
554	The Sherrington Group	Columbus, Ohio	77.57	-0.01	0.58	-1.50	1.52
555	Granite Financial Group	Brookfield, Wis.	74.60	52.24	0.20	-38.70	148.37
556	Northvest	Keene, N.H.	71.00	5.97	1.42	5.97	0.00
557	Elderado Financial	Montrose, Colo.	70.38	14.06	0.34	9.71	3.96
558	Hixon Zuercher Capital Management	Findlay, Ohio	68.54	26.87	0.36	12.10	13.17
559	Chicago Investment Advisory Group	Mokena, Ill.	65.60	23.08	0.21	16.43	5.70
560	Gold Medal Waters	Boulder, Colo.	64.71	18.14	0.70	25.76	-6.06
561	Safe Harbor Asset Management	Huntington, N.Y.	29.57	0.41	0.84	-25.41	34.62
562	Timmons Wealth Management	Attleboro, Mass.	12.24	58.36	0.30	8.15	46.43

\* Discretionary and nondiscretionary AUM reported on Form ADV. \*\* Average assets per client relationship. NM = not meaningful.

♦ CORRECTION NOTE: Due to a reporting error by Spraker Wealth Management, its assets were incorrectly reported in the survey at \$118.63. The firm's assets as of Dec 31, 2014, should have been listed as \$128.13, % growth in assets 2013-2014 as +8.02%; assets per client \$1.32; % in growth in assets per client as -2.00%.