

FINANCIAL ADVISOR

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# RIA SURVEY & RANKING



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# TOP 50 FASTEST-GROWING FIRMS With More Than \$200 Million In AUM

GROWTH RANK	FIRM NAME	LOCATION	YEAR END 2015 ASSETS (\$MM)	% GROWTH IN ASSETS 2014-2015	2015 CLIENTS	% GROWTH IN ASSETS PER CLIENT
1	WealthPLAN Partners	Omaha, Neb.	1,656.63	155.70%	2,700	51.53%
2	Bronfman E.L. Rothschild	Rockville, Md.	3,789.28	127.92%	2,144	27.57%
3	Financial Insights	Tacoma, Wash.	246.70	92.24%	500	-3.88%
4	Polaris Greystone Financial Group	San Rafael, Calif.	995.00	91.87%	1,120	-2.35%
5	Carnick & Kubik	Denver, Colo.	600.00	87.50%	500	12.50%
6	Ritholtz Wealth Management	New York, N.Y.	280.00	86.67%	250	30.67%
7	Red Door Wealth Management	Memphis, Tenn.	230.67	85.04%	160	38.78%
8	Creative Financial Group	Atlanta, Ga.	1,689.78	58.09%	810	53.80%
9	AJ Wealth	New York, N.Y.	368.93	56.24%	156	10.17%
10	Hartland	Cleveland, Ohio	2,526.51	54.28%	625	31.32%
11	Alexandria Capital	Washington, D.C.	631.80	47.98%	425	-7.73%
12	Millares Asset Management	Coral Gables, Fla.	336.05	47.43%	33	96.57%
13	BlueSky Wealth Advisors	New Bern, N.C.	360.00	45.75%	281	1.14%
14	Parallel Advisors	San Francisco, Calif.	1,037.17	44.97%	1,291	0.84%
15	Innovest Portfolio Solutions	Denver, Colo.	12,594.00	42.10%	254	30.35%
16	Capital Fiduciary Advisors	Reston, Va.	462.58	39.97%	253	-24.20%
17	United Capital Financial Advisors	Newport Beach, Calif.	15,406.38	38.26%	15,857	-7.20%
18	Gierl Augustine Investment Management	Saarver, Pa.	220.53	37.07%	475	15.43%
19	Archford Capital Strategies	Swansea, Ill.	468.73	34.14%	454	3.41%
20	First Republic Investment Management	San Francisco, Calif.	47,210.89	33.74%	11,356	-11.67%
21	The Colony Group	Boston, Mass.	5,031.50	31.96%	1,807	15.53%
22	Capital Wealth Advisors	Naples, Fla.	348.92	31.32%	298	-21.56%
23	Hemington Wealth Management	Tysons, Va.	445.45	31.01%	267	-1.86%
24	The Mather Group	Chicago, Ill.	808.89	29.27%	515	-2.11%
25	Delphi Private Advisors	San Diego, Calif.	541.50	29.21%	172	20.94%
26	Swan Global Investments	Durango, Colo.	2,520.34	28.10%	4,400	16.45%
27	Telemus Capital	Southfield, Mich.	2,221.81	28.08%	1,140	34.82%
28	Householder Group Estate and Retirement Specialists	Scottsdale, Ariz.	478.10	27.89%	2,316	22.76%
29	WE Family Offices	Miami, Fla.	4,237.33	27.87%	70	24.22%
30	Advisors Capital Management	Ridgewood, N.J.	1,337.54	27.72%	3,000	6.43%
31	The Pacific Financial Group	Bellevue, Wash.	1,420.42	26.35%	11,396	0.93%
32	Aveo Capital Partners	Greenwood Village, Colo.	548.22	25.80%	684	31.87%
33	LeafHouse Financial Advisors	Austin, Texas	906.48	25.71%	225	-36.31%
34	Creative Planning	Leawood, Kan.	16,583.54	25.64%	11,500	9.25%
35	Gradient Investments	Arden Hills, Minn.	870.04	24.88%	6,761	-13.63%
36	Socius Family Office	Boca Raton, Fla.	208.97	24.08%	101	11.80%
37	Wellesley Investment Advisors	Wellesley, Mass.	2,318.97	24.03%	917	34.04%
38	Spire Investment Partners	McLean, Va.	1,868.38	23.94%	2,000	23.94%
39	Treybourne Wealth Planners	Greenwood, Ind.	208.35	23.67%	236	17.90%
40	MFA Asset Management	Tewksbury, Mass.	400.31	23.65%	80	-7.26%
41	Personal Financial Group	Overland Park, Kan.	294.34	23.40%	824	-2.66%
42	Family Office Research	Bethesda, Md.	221.70	23.17%	25	47.80%
43	Main Street Research	Sausalito, Calif.	619.34	23.02%	488	5.88%
44	Kercheville Advisors	San Antonio, Texas	118.00	22.92%	90	-18.06%
45	Mill Creek Capital Advisors	Conshohocken, Pa.	4,706.12	22.62%	307	7.04%
46	BBR Partners	New York, N.Y.	10,858.40	22.22%	114	11.50%
47	JFS Wealth Advisors	Hermitage, Pa.	1,752.45	22.20%	1,445	-11.21%
48	J. W. Coons Advisors	Columbus, Ohio	328.18	22.05%	124	-5.51%
49	Marrs Wealth Management	Ames, Iowa	146.83	21.57%	252	-20.40%
50	Mariner Wealth Advisors	Leawood, Kan.	12,276.91	21.51%	6,300	-2.25%