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SURVEY & RANKING 2017

# TOP 50 FASTEST-GROWING FIRMS

With More  
Than \$250 Million  
In AUM

GROWTH RANK	FIRM NAME	LOCATION	2016 CLIENTS	YEAR END 2016 ASSETS (\$MM)	% GROWTH IN ASSETS 2015-2016	% GROWTH IN ASSETS PER CLIENT
1	Zeke Capital Advisors	Berwyn, Pa.	45	5,448.19	150.57%	323.18%
2	Capital Wealth Advisors	Naples, Fla.	400	717.48	105.63%	53.19%
3	Cornerstone Advisory	Hunt Valley, Md.	590	991.07	100.55%	21.35%
4	Ritholtz Wealth Management	New York, N.Y.	424	440.00	97.31%	-6.46%
5	The Wealth Consulting Group (WCG)	Las Vegas, Nev.	2,500	894.39	95.13%	9.27%
6	Sequoia Financial Group	Akron, Ohio	1,985	2,749.97	80.49%	37.39%
7	Titus Wealth Management	Larkspur, Calif.	1,315	295.68	75.20%	0.86%
8	Strategic Wealth Advisors Group	Sacramento, Calif.	8,000	2,269.35	72.99%	72.99%
9	LeafHouse Financial Advisors	Austin, Texas	370	1,500.00	65.48%	11.81%
10	Platinum Wealth Partners	Tampa, Fla.	1,400	543.70	62.30%	39.11%
11	Burton Enright Welch	Walnut Creek, Calif.	375	526.36	60.14%	-6.05%
12	Tiedemann Wealth Management	New York, N.Y.	438	8,224.72	59.29%	-45.09%
13	Miracle Mile Advisors	Los Angeles, Calif.	277	753.00	59.20%	5.75%
14	MCF Advisors	Covington, Ky.	1,942	1,376.01	58.74%	93.97%
15	Pathstone Federal Street	Fort Lee, N.J.	334	8,543.93	55.17%	-14.05%
16	Wealth Enhancement Advisory Services	Plymouth, Minn.	9,743	5,800.00	51.62%	37.72%
17	AJ Wealth	New York, N.Y.	174	536.71	45.48%	30.43%
18	Gradient Investments	Arden Hills, Minn.	8,937	1,258.15	44.61%	9.40%
19	The Insight Group	Salt Lake City, Utah	302	523.29	44.28%	29.94%
20	C2P Capital Advisory Group	Westlake, Ohio	2,000	665.42	42.78%	-19.90%
21	RMB Capital Management	Chicago, Ill.	1,487	5,222.07	42.71%	31.10%
22	Adviser Investments	Newton, Mass.	3,011	4,816.96	41.96%	37.15%
23	Delphi Private Advisors	San Diego, Calif.	175	746.00	37.77%	35.40%
24	Socius Family Office	Fort Lauderdale, Fla.	102	287.54	37.60%	34.90%
25	Arlington Family Offices	Birmingham, Ala.	95	1,527.81	37.31%	28.64%
26	Vestory	Bellevue, Wash.	615	308.67	36.66%	15.55%
27	Sentinus	Oak Brook, Ill.	325	281.82	35.62%	-16.54%
28	Larson Financial Group	Saint Louis, Mo.	5,569	1,041.43	35.57%	23.43%
29	Ruggie Wealth Management (Ruggie Capital Group)	Tavares, Fla.	263	457.95	35.15%	20.25%
30	McAdam	Philadelphia, Pa.	3,500	251.03	34.82%	17.49%
31	Merriman Wealth Management	Seattle, Wash.	1,902	2,011.74	34.61%	13.95%
32	Hemington Wealth Management	Tysons Corner, Va.	253	598.50	34.34%	22.13%
33	Girard Partners	King of Prussia, Pa.	1,302	902.23	32.92%	-13.23%
34	Glass Jacobson Financial Group	Owings Mills, Md.	428	401.43	32.81%	15.43%
35	Parallel Advisors	San Francisco, Calif.	1,489	1,377.40	32.80%	7.38%
36	Creative Planning	Leawood, Kan.	15,000	22,003.06	32.68%	-2.70%
37	Annex Wealth Management	Elm Grove, Wis.	4,264	1,381.51	32.54%	13.46%
38	Reilly Financial Advisors	La Mesa, Calif.	880	1,023.64	31.55%	18.09%
39	Wellesley Investment Partners	Wellesley, Mass.	152	307.15	30.77%	-2.78%
40	TRUE Private Wealth advisors	Salem, Ore.	1,000	695.28	30.41%	27.54%
41	Cahaba Wealth Management	Atlanta, Ga.	413	404.12	30.35%	18.67%
42	Colorado Financial Management	Boulder, Colo.	650	1,300.00	30.00%	20.00%
43	Heron Wealth	New York, N.Y.	104	266.25	29.63%	12.18%
44	EP Wealth Advisors	Torrance, Calif.	2,275	2,530.88	29.45%	8.11%
45	Woodward Financial Advisors	Chapel Hill, N.C.	140	272.67	29.32%	20.08%
46	Kovack Advisors	Fort Lauderdale, Fla.	7,900	1,690.76	28.39%	-12.24%
47	Hartland & Co.	Cleveland, Ohio	676	3,226.64	27.71%	18.08%
48	RTD Financial Advisors	Philadelphia, Pa.	568	1,250.18	27.58%	3.54%
49	Modera Wealth Management	Westwood, N.J.	980	2,075.00	26.52%	15.55%
50	AM Global Family Investment Office	West Palm Beach, Fla.	22	423.01	26.39%	20.65%

# FA's 2017 RIA RANKING

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2016 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2016 ASSETS (\$MM)*	% GROWTH IN ASSETS 2015-2016	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
ASSET CATEGORY: \$1 BILLION AND OVER							
1	CAPTRUST	Raleigh, N.C.	213,461.20	22.98%	\$52.32	-3.45%	27.38%
2	First Republic Investment Management	San Francisco, Calif.	58,064.59	22.99%	\$5.71	8.89%	12.94%
3	Hall Capital Partners	San Francisco, Calif.	29,560.38	2.03%	\$223.94	3.58%	-1.49%
4	HighTower Advisors	Chicago, Ill.	28,500.00	15.85%	\$2.38	-3.46%	20.00%
5	Creative Planning	Leawood, Kan.	22,003.06	32.68%	\$1.47	-2.70%	36.36%
6	Silvercrest Asset Management Group	New York, N.Y.	18,600.00	2.76%	\$28.14	-4.23%	7.31%
7	Edelman Financial Services	Fairfax, Va.	17,783.00	19.51%	\$0.56	8.32%	10.33%
8	United Capital Financial Advisers	Newport Beach, Calif.	17,463.35	13.35%	\$1.01	3.65%	9.36%
9	Moneta Group	Clayton, Mo.	16,200.00	11.72%	\$3.69	8.16%	3.29%
10	Advanced Capital Group	Minneapolis, Minn.	14,562.40	6.40%	\$50.92	-5.51%	12.60%
11	Veritable	Newtown Square, Pa.	14,044.84	3.36%	\$65.32	3.36%	0.00%
12	Oxford Financial Group	Carmel, Ind.	13,343.54	-1.72%	\$15.25	-0.48%	-1.24%
13	Mariner Wealth Advisors	Overland Park, Kan.	13,201.32	7.47%	\$1.20	-0.02%	7.49%
14	BBR Partners	New York, N.Y.	12,484.20	14.97%	\$99.87	4.86%	9.65%
15	Plante Moran Financial Advisors	Southfield, Mich.	11,996.87	2.79%	\$4.44	-6.16%	9.53%
16	DiMeo Schneider & Associates	Chicago, Ill.	11,365.86	21.97%	\$31.40	15.91%	5.23%
17	Aspiriant	Los Angeles, Calif.	10,532.42	17.45%	\$8.23	-5.95%	24.88%
18	Brownson, Rehms & Foxworth	Chicago, Ill.	10,273.13	4.08%	\$22.58	21.70%	-14.47%
19	CIBC Atlantic Trust Private Wealth Management	Atlanta, Ga.	10,106.62	7.32%	\$2.45	21.65%	-11.78%
20	Segall Bryant & Hamill	Chicago, Ill.	10,059.46	4.87%	\$10.06	-5.62%	11.11%
21	Advanced Research Investment Solutions	Beverly Hills, Calif.	9,876.34	8.15%	\$246.91	-2.66%	11.11%
22	Johnson Investment Counsel	Cincinnati, Ohio	9,109.76	9.13%	\$2.72	-7.81%	18.37%
23	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	8,905.25	10.34%	\$13.04	6.63%	3.48%
24	Buckingham Strategic Wealth	St. Louis, Mo.	8,766.37	24.24%	\$1.79	7.46%	15.61%
25	Pathstone Federal Street	Fort Lee, N.J.	8,543.93	55.17%	\$25.58	-14.05%	80.54%
26	Tiedemann Wealth Management	New York, N.Y.	8,224.72	59.29%	\$18.78	-45.09%	190.07%
27	Geneva Advisors	Chicago, Ill.	7,857.44	0.41%	\$1.77	-7.93%	9.06%
28	Denver Investments	Denver, Colo.	7,169.35	-2.88%	\$14.72	-2.08%	-0.81%
29	Boston Private Wealth	Boston, Mass.	7,008.00	-13.95%	\$2.56	-8.92%	-5.52%
30	RSM US Wealth Management	Minneapolis, Minn.	6,922.00	23.65%	\$1.86	19.79%	3.22%
31	Beacon Pointe Advisors	Newport Beach, Calif.	6,658.33	-11.67%	\$5.12	-4.88%	-7.14%
32	Evercore Wealth Management	New York, N.Y.	6,472.88	4.19%	\$11.34	16.23%	-10.36%
33	Ballentine Partners	Waltham, Mass.	6,397.06	6.80%	\$35.74	0.83%	5.92%
34	Clarfeld Financial Advisors	Tarrytown, N.Y.	6,004.50	15.20%	\$15.20	12.28%	2.60%
35	Wealth Enhancement Advisory Services	Plymouth, Minn.	5,800.00	51.62%	\$0.60	37.72%	10.09%
36	myCIO Wealth Partners	Philadelphia, Pa.	5,726.21	12.07%	\$8.34	8.65%	3.15%
37	Ronald Blue & Co.	Roswell, Ga.	5,721.98	-13.78%	\$0.84	-11.24%	-2.86%
38	Global Financial Private Capital	Sarasota, Fla.	5,676.36	-3.21%	\$0.11	-19.26%	19.88%
39	Gresham Partners	Chicago, Ill.	5,650.43	2.32%	\$62.78	-3.36%	5.88%
40	GW & Wade	Wellesley, Mass.	5,526.33	8.91%	\$2.43	11.54%	-2.36%
41	Athena Capital Advisors	Lincoln, Mass.	5,498.27	-8.34%	\$127.87	-10.47%	2.38%
42	Zeke Capital Advisors	Berwyn, Pa.	5,448.19	150.57%	\$121.07	323.18%	-40.79%
43	WE Family Offices	Miami, Fla.	5,341.55	26.06%	\$76.31	26.06%	0.00%
44	The Colony Group	Boston, Mass.	5,253.20	4.41%	\$2.84	2.15%	2.21%
45	RMB Capital Management	Chicago, Ill.	5,222.07	42.71%	\$3.51	31.10%	8.86%
46	CV Advisors	Miami, Fla.	5,091.32	20.31%	\$53.03	4.02%	15.66%
47	Mill Creek Capital Advisors	Conshohocken, Pa.	4,981.23	5.85%	\$15.97	4.15%	1.63%
48	The Monroe Vos Consulting Group	Houston, Texas	4,937.34	-0.68%	\$53.67	-9.32%	9.52%
49	Tolleson Wealth Management	Dallas, Texas	4,916.00	8.47%	\$31.92	7.06%	1.32%
50	Litman Gregory	Larkspur, Calif.	4,897.79	-20.34%	\$13.87	-21.47%	1.44%
51	Adviser Investments	Newton, Mass.	4,816.96	41.96%	\$1.60	37.15%	3.51%

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

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52	Sontag Advisory	New York, N.Y.	4,790.65	16.30%	\$3.96	12.84%	3.07%
53	Savant Capital	Rockford, Ill.	4,671.57	10.59%	\$1.13	5.36%	4.96%
54	Northside Capital Management	Hood River, Ore.	4,588.64	17.47%	\$163.88	13.28%	3.70%
55	Ferguson Wellman Capital Management	Portland, Ore.	4,561.15	6.05%	\$5.93	2.47%	3.50%
56	Douglas C. Lane & Associates	New York, N.Y.	4,522.05	3.03%	\$3.92	7.13%	-3.83%
57	Heber Fuger Wendin	Bloomfield Hills, Mich.	4,502.56	-1.26%	\$32.87	-9.19%	8.73%
58	Homrich Berg	Atlanta, Ga.	4,499.72	10.23%	\$3.02	5.35%	4.63%
59	Finaccess Advisors	Miami, Fla.	4,354.24	11.85%	\$72.57	-6.79%	20.00%
60	Welch & Forbes	Boston, Mass.	4,244.51	7.51%	\$5.25	-0.46%	8.01%
61	Cornerstone Advisors Asset Management	Bethlehem, Pa.	4,239.81	-3.10%	\$46.08	23.23%	-21.37%
62	Hewins Financial Advisors / Wipfli Hewins Investment Advisors	Redwood City, Calif.	4,232.55	13.33%	\$2.37	1.14%	12.05%
63	Brighton Jones	Seattle, Wash.	4,004.31	18.70%	\$3.13	4.97%	13.07%
64	Freestone Capital Management	Seattle, Wash.	3,878.71	18.47%	\$2.15	6.00%	11.76%
65	Wetherby Asset Management	San Francisco, Calif.	3,668.26	0.00%	\$6.67	-4.55%	4.76%
66	Conrad Siegel Investment Advisors	Harrisburg, Pa.	3,666.45	21.64%	\$18.33	9.48%	11.11%
67	Heck Capital Advisors	Rhineland, Wis.	3,583.09	16.78%	\$4.94	8.72%	7.41%
68	Bartlett & Co.	Cincinnati, Ohio	3,578.33	6.55%	\$3.16	5.33%	1.16%
69	Signature Family Wealth Advisors	Norfolk, Va.	3,542.50	6.82%	\$15.47	2.62%	4.09%
70	BIOIS (Bingham, Osborn & Scarborough)	San Francisco, Calif.	3,535.77	11.15%	\$3.87	10.66%	0.44%
71	WMS Partners	Towson, Md.	3,442.00	19.20%	\$9.98	14.37%	4.23%
72	Plancorp	St. Louis, Mo.	3,440.00	13.68%	\$3.18	7.48%	5.76%
73	Money Matters With Ken Moraif	Plano, Texas	3,432.86	19.97%	\$0.47	-1.09%	21.28%
74	Dowling & Yahnke	San Diego, Calif.	3,414.24	12.02%	\$3.09	7.66%	4.05%
75	R. M. Davis	Portland, Maine	3,389.33	7.21%	\$1.88	1.25%	5.88%
76	Cornerstone Advisors	Bellevue, Wash.	3,331.45	6.74%	\$5.55	6.74%	0.00%
77	Balasa Dinverno Foltz	Itasca, Ill.	3,311.77	4.83%	\$3.14	0.56%	4.25%
78	Joel Isaacson & Co.	New York, N.Y.	3,286.43	12.62%	\$3.72	30.34%	-13.60%
79	Hartland & Co.	Cleveland, Ohio	3,226.64	27.71%	\$4.77	18.08%	8.16%
80	American Portfolios Financial Services	Holbrook, N.Y.	3,158.47	25.18%	\$0.26	18.92%	5.26%
81	South Texas Money Management	San Antonio, Texas	3,023.91	9.38%	\$1.72	4.66%	4.51%
82	Sullivan, Bruyette, Speros & Blayney	McLean, Va.	2,937.00	9.88%	\$3.08	7.35%	2.36%
83	Ingalls & Snyder	New York, N.Y.	2,911.48	12.13%	\$0.83	8.93%	2.94%
84	SignatureFD	Atlanta, Ga.	2,840.00	23.59%	\$3.07	19.71%	3.24%
85	Kovitz Investment Group	Chicago, Ill.	2,838.19	6.81%	\$2.37	-2.10%	9.09%
86	Sequoia Financial Group	Akron, Ohio	2,749.97	80.49%	\$1.39	37.39%	31.37%
87	MRA Associates	Phoenix, Ariz.	2,706.09	14.43%	\$4.73	5.02%	8.95%
88	Wilbanks Smith & Thomas Asset Management	Norfolk, Va.	2,683.99	8.03%	\$1.17	0.67%	7.32%
89	Honkamp Krueger Financial Services	Dubuque, Iowa	2,671.26	14.46%	\$0.81	6.27%	7.70%
90	Cumberland Advisors	Sarasota, Fla.	2,665.53	8.93%	\$2.67	-1.97%	11.11%
91	Wellesley Asset Management	Wellesley, Mass.	2,639.07	13.91%	\$1.50	21.92%	-6.57%
92	EP Wealth Advisors	Torrance, Calif.	2,530.88	29.45%	\$1.11	8.11%	19.74%
93	Allegheny Financial Group	Pittsburgh, Pa.	2,501.10	0.00%	\$1.14	-4.42%	4.62%
94	Clifford Swan Investment Counselors	Pasadena, Calif.	2,469.00	3.22%	\$3.46	11.62%	-7.52%
95	Truepoint Wealth Counsel	Cincinnati, Ohio	2,430.72	20.88%	\$3.49	14.45%	5.61%
96	Valeo Financial Advisors	Indianapolis, Ind.	2,425.17	20.93%	\$2.02	10.85%	9.09%
97	Matter Family Office	Clayton, Mo.	2,344.20	6.09%	\$15.42	11.68%	-5.00%
98	Halbert Hargrove Global Advisors	Long Beach, Calif.	2,332.98	-38.89%	\$3.99	-40.15%	2.10%
99	Greenspring Wealth Management	Towson, Md.	2,300.13	17.29%	\$6.35	11.78%	4.93%
100	HBKS Wealth Advisors	Erie, Pa.	2,288.73	12.15%	\$0.61	-14.69%	31.47%
101	Strategic Wealth Advisors Group	Sacramento, Calif.	2,269.35	72.99%	\$0.28	72.99%	0.00%
102	EMM	New York, N.Y.	2,258.18	2.71%	\$18.36	1.88%	0.82%
103	Budros, Ruhlin & Roe	Columbus, Ohio	2,235.30	9.22%	\$3.26	6.67%	2.39%

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104	Badgley Phelps Wealth Managers	Seattle, Wash.	2,210.33	9.89%	\$4.77	10.60%	-0.64%
105	Weston Financial Group	Wellesley, Mass.	2,192.10	6.01%	\$2.04	-2.29%	8.49%
106	SVA Plumb Wealth Management	Madison, Wis.	2,165.32	8.06%	\$1.48	0.58%	7.44%
107	Heritage Investors Management	Bethesda, Md.	2,137.35	8.37%	\$5.34	8.37%	0.00%
108	Westmount Asset Management	Los Angeles, Calif.	2,134.57	11.53%	\$2.03	6.11%	5.11%
109	JMG Financial Group	Downers Grove, Ill.	2,088.00	12.08%	\$3.10	8.91%	2.91%
110	Crescent Grove Advisors	Lake Forest, Ill.	2,078.17	26.35%	\$13.58	23.88%	2.00%
111	Modera Wealth Management	Westwood, N.J.	2,075.00	26.52%	\$2.12	15.55%	9.50%
112	Telemus Capital	Southfield, Mich.	2,060.39	-7.27%	\$3.44	-7.27%	0.00%
113	Fort Pitt Capital Group	Pittsburgh, Pa.	2,060.17	9.23%	\$1.10	6.79%	2.29%
114	Green Square Capital	Memphis, Tenn.	2,059.53	11.83%	\$10.00	-14.23%	30.38%
115	Mainstay Capital Management	Grand Blanc, Mich.	2,057.53	6.59%	\$0.57	12.91%	-5.59%
116	Merriman Wealth Management	Seattle, Wash.	2,011.74	34.61%	\$1.06	13.95%	18.14%
117	Parsec Financial Management	Asheville, N.C.	2,005.20	16.43%	\$1.41	2.59%	13.49%
118	Beirne Wealth Consulting Services	Shelton, Conn.	2,001.31	7.21%	\$2.04	-0.88%	8.16%
119	Palladium Registered Investment Advisors	Norfolk, Va.	1,977.28	9.56%	\$2.31	2.40%	6.99%
120	Biltmore Family Office	Charlotte, N.C.	1,967.79	5.57%	\$32.80	-8.50%	15.38%
121	Andersen Tax	McLean, Va.	1,952.60	2.78%	\$6.24	-1.16%	3.99%
122	Massey Quick & Co.	Morristown, N.J.	1,933.53	-3.38%	\$9.43	-15.64%	14.53%
123	Delegate Advisors	San Francisco, Calif.	1,913.16	13.42%	\$86.96	3.11%	10.00%
124	Foster Group	Urbandale, Iowa	1,900.00	16.14%	\$1.71	8.81%	6.74%
125	Hamilton Capital Management	Columbus, Ohio	1,892.27	21.49%	\$1.11	6.62%	13.94%
126	Wescott Financial Advisory Group	Philadelphia, Pa.	1,883.81	-6.46%	\$3.77	-3.65%	-2.91%
127	Warren Averett Asset Management	Birmingham, Ala.	1,872.88	5.85%	\$2.10	-9.10%	16.45%
128	Bordeaux Wealth Advisors	Menlo Park, Calif.	1,871.05	-2.60%	\$19.90	-0.53%	-2.08%
129	Grimes & Company	Westborough, Mass.	1,866.26	4.71%	\$0.86	5.29%	-0.55%
130	Frontier Investment Management Company	Dallas, Texas	1,852.22	16.56%	\$1.55	2.24%	14.00%
131	JFS Wealth Advisors	Hermitage, Pa.	1,832.01	4.54%	\$1.26	3.54%	0.97%
132	Cassaday & Company	McLean, Va.	1,828.33	17.09%	\$1.07	7.24%	9.18%
133	Pinnacle Advisory Group	Columbia, Md.	1,800.00	12.50%	\$1.44	-1.00%	13.64%
134	The Pacific Financial Group	Bellevue, Wash.	1,784.28	25.62%	\$0.13	6.13%	18.37%
135	Welch Hornsby	Montgomery, Ala.	1,736.30	3.75%	\$3.93	6.10%	-2.21%
136	Coastal Bridge Advisors	Westport, Conn.	1,735.21	25.75%	\$6.94	0.60%	25.00%
137	Family Management Corporation	New York, N.Y.	1,730.03	24.27%	\$2.97	21.49%	2.28%
138	Camden Capital	El Segundo, Calif.	1,713.90	10.72%	\$7.86	1.58%	9.00%
139	Fairview Capital Investment Management	Greenbrae, Calif.	1,700.73	14.00%	\$10.63	6.88%	6.67%
140	Frontier Wealth Management	Kansas City, Mo.	1,695.15	16.04%	\$1.17	13.64%	2.11%
141	WaterOak Advisors	Winter Park, Fla.	1,691.70	16.85%	\$2.82	11.01%	5.26%
142	Kovack Advisors	Fort Lauderdale, Fla.	1,690.76	28.39%	\$0.21	-12.24%	46.30%
143	Brookstone Capital Management	Wheaton, Ill.	1,687.00	9.76%	\$0.17	4.27%	5.26%
144	SJS Investment Services	Sylvania, Ohio	1,679.00	9.81%	\$2.69	7.35%	2.29%
145	TFO-TDC	Maumee, Ohio	1,648.13	15.72%	\$1.23	8.87%	6.28%
146	Morton Capital Management	Calabasas, Calif.	1,638.29	6.18%	\$1.87	0.12%	6.05%
147	Sage Financial Group	Conshohocken, Pa.	1,631.54	10.09%	\$2.61	5.69%	4.17%
148	Carlson Capital Management	Northfield, Minn.	1,595.87	17.41%	\$1.87	5.98%	10.79%
149	Accredited Investors Wealth Management	Edina, Minn.	1,577.05	9.18%	\$3.64	2.12%	6.91%
150	G.W. Henssler & Associates	Kennesaw, Ga.	1,555.61	-1.63%	\$1.53	-1.63%	0.00%
151	Barrett Asset Management	New York, N.Y.	1,548.00	4.10%	\$8.32	4.66%	-0.53%
152	Retirement Income Solutions	Ann Arbor, Mich.	1,532.14	8.19%	\$1.33	7.35%	0.79%
153	Arlington Family Offices	Birmingham, Ala.	1,527.81	37.31%	\$16.08	28.64%	6.74%
154	Strategic Wealth Partners Group	Deerfield, Ill.	1,526.52	0.56%	\$3.38	-7.02%	8.15%
155	Resource Consulting Group	Orlando, Fla.	1,521.92	16.85%	\$3.88	15.96%	0.77%

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# FA's 2017 RIA RANKING

CAMBRIDGE

FlexShares  
Exchange Traded Funds

2016 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2016 ASSETS (\$MM)*	% GROWTH IN ASSETS 2015-2016	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
156	Obermeyer Wood Investment Counsel	Aspen, Colo.	1,509.00	-5.69%	\$2.74	-4.83%	-0.90%
157	Klingman & Associates	New York, N.Y.	1,505.99	11.05%	\$5.14	13.70%	-2.33%
158	Beaumont Financial Partners	Needham, Mass.	1,505.67	7.96%	\$1.37	3.06%	4.76%
159	LeafHouse Financial Advisors	Austin, Texas	1,500.00	65.48%	\$4.05	11.81%	48.00%
160	CM Wealth Advisors	Pepper Pike, Ohio	1,473.00	5.36%	\$7.37	-34.67%	61.29%
161	Crestwood Advisors	Boston, Mass.	1,469.07	11.13%	\$4.23	9.53%	1.46%
162	Genovese Burford & Brothers	Sacramento, Calif.	1,467.95	7.98%	\$1.51	-14.17%	25.81%
163	Mission Wealth	Santa Barbara, Calif.	1,467.49	19.15%	\$2.04	20.31%	-0.96%
164	Pure Financial Advisors	San Diego, Calif.	1,465.98	22.50%	\$0.77	3.64%	18.19%
165	F.L. Putnam Investment Management Company	Wellesley, Mass.	1,462.28	7.15%	\$2.67	-0.87%	8.09%
166	Brightworth	Atlanta, Ga.	1,430.98	16.59%	\$2.24	-1.63%	18.52%
167	Radnor Financial Advisors	Wayne, Pa.	1,423.67	21.00%	\$4.49	6.88%	13.21%
168	Brouwer & Janachowski	Mill Valley, Calif.	1,417.97	10.84%	\$2.17	-14.96%	30.34%
169	ARGI Investment Services	Louisville, Ky.	1,407.31	25.46%	\$0.50	12.01%	12.00%
170	RCL Advisors	New York, N.Y.	1,402.99	-2.11%	\$9.95	-4.88%	2.92%
171	FCE Group	Lake Success, N.Y.	1,392.48	15.49%	\$2.78	10.87%	4.17%
172	Covenant	San Antonio, Texas	1,392.16	4.13%	\$4.36	-15.13%	22.69%
173	Annex Wealth Management	Elm Grove, Wis.	1,381.51	32.54%	\$0.32	13.46%	16.82%
174	Parallel Advisors	San Francisco, Calif.	1,377.40	32.80%	\$0.93	7.38%	23.67%
175	North American Management	Boston, Mass.	1,377.28	-6.38%	\$3.20	4.94%	-10.79%
176	Osborne Partners Capital Management	San Francisco, Calif.	1,376.91	0.87%	\$2.79	2.92%	-1.99%
177	MCF Advisors	Covington, Ky.	1,376.01	58.74%	\$0.71	93.97%	-18.16%
178	ACG Wealth	Atlanta, Ga.	1,372.70	23.58%	\$1.40	-12.19%	40.75%
179	BerganKDV Wealth Management	Bloomington, Minn.	1,351.53	19.26%	\$1.26	13.24%	5.31%
180	Axia Advisory	Indianapolis, Ind.	1,337.61	17.25%	\$11.24	17.25%	0.00%
181	Financial Clarity	Mountain View, Calif.	1,335.75	11.03%	\$43.09	0.29%	10.71%
182	Courier Capital	Buffalo, N.Y.	1,329.84	12.06%	\$2.08	26.94%	-11.72%
183	Singer Xenos Wealth Management	Coral Gables, Fla.	1,300.00	17.12%	\$2.32	15.03%	1.82%
184	Colorado Financial Management	Boulder, Colo.	1,300.00	30.00%	\$2.00	20.00%	8.33%
185	Provis Management Group	Clearwater, Fla.	1,260.64	7.03%	\$1.18	1.13%	5.84%
186	Gradient Investments	Arden Hills, Minn.	1,258.15	44.61%	\$0.14	9.40%	32.18%
187	TrustCore Financial Services	Brentwood, Tenn.	1,254.73	3.67%	\$0.84	-17.06%	25.00%
188	RTD Financial Advisors	Philadelphia, Pa.	1,250.18	27.58%	\$2.20	3.54%	23.21%
189	Guyasuta Investment Advisors	Pittsburgh, Pa.	1,241.32	18.74%	\$3.82	2.30%	16.07%
190	Calamos Wealth Management	Naperville, Ill.	1,235.65	17.68%	\$1.69	7.52%	9.45%
191	Smith Salley & Associates	Greensboro, N.C.	1,225.00	13.95%	\$3.89	-9.56%	26.00%
192	West Financial Services	McLean, Va.	1,223.51	10.01%	\$1.82	3.95%	5.84%
193	Schneider Downs Wealth Management Advisors	Pittsburgh, Pa.	1,212.99	14.91%	\$2.36	17.37%	-2.10%
194	Bridgewater Advisors	New York, N.Y.	1,212.25	6.27%	\$3.10	3.82%	2.36%
195	Altvest Personal Wealth Management	New York, N.Y.	1,173.46	5.70%	\$1.95	3.42%	2.20%
196	Foster & Motley	Cincinnati, Ohio	1,164.20	11.40%	\$2.27	3.37%	7.77%
197	Heritage Financial Services	Westwood, Mass.	1,164.00	16.28%	\$1.47	6.30%	9.39%
198	Fragasso Financial Advisors	Pittsburgh, Pa.	1,163.00	4.90%	\$0.86	-1.63%	6.65%
199	Fairway Wealth Management	Independence, Ohio	1,150.99	9.34%	\$6.43	-2.26%	11.88%
200	Huber Financial Advisors	Lincolnshire, Ill.	1,147.00	18.92%	\$1.25	16.33%	2.22%
201	Sadoff Investment Management	Milwaukee, Wis.	1,119.82	6.38%	\$1.79	5.01%	1.30%
202	IPI Wealth Management	Decatur, Ill.	1,102.07	10.81%	\$0.28	-3.04%	14.29%
203	SFMG Wealth Advisors	Plano, Texas	1,079.97	15.12%	\$1.77	3.42%	11.31%
204	Legacy Wealth Management	Memphis, Tenn.	1,071.84	5.15%	\$1.27	1.03%	4.08%
205	Polaris Greystone Financial Group	San Rafael, Calif.	1,064.15	9.48%	\$0.90	-1.95%	11.65%
206	GHP Investment Advisors	Denver, Colo.	1,057.70	16.19%	\$1.52	8.86%	6.73%
207	Sheaff Brock Investment Advisors	Indianapolis, Ind.	1,052.34	-4.38%	\$0.83	39.08%	-31.25%

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208	Daintree Advisors	Boston, Mass.	1,042.10	-3.67%	\$4.55	-9.14%	6.02%
209	Larson Financial Group	Saint Louis, Mo.	1,041.43	35.57%	\$0.19	23.43%	9.84%
210	LBMC Investment Advisors	Brentwood, Tenn.	1,037.26	10.23%	\$3.15	-12.22%	25.57%
211	The Windsor Group	Indianapolis, Ind.	1,024.00	19.52%	\$1.29	9.56%	9.09%
212	Reilly Financial Advisors	La Mesa, Calif.	1,023.64	31.55%	\$1.16	18.09%	11.39%
213	Horter Investment Management	Cincinnati, Ohio	1,016.47	18.75%	\$0.24	-5.38%	25.49%
214	IFG Advisory	Atlanta, Ga.	1,000.00	125.87%	\$0.28	-46.54%	322.50%
<b>ASSET CATEGORY: \$500 MILLION TO &lt; \$1 BILLION</b>							
215	Cornerstone Advisory	Hunt Valley, Md.	991.07	100.55%	\$1.68	21.35%	65.27%
216	Stonebridge Capital Advisors	Saint Paul, Minn.	983.04	6.10%	\$1.24	1.68%	4.35%
217	CPS Investment Advisors	Lakeland, Fla.	979.79	6.80%	\$0.50	3.53%	3.16%
218	The Mather Group	Chicago, Ill.	974.85	20.52%	\$1.35	-13.80%	39.81%
219	Albion Financial Group	Salt Lake City, Utah	969.30	6.96%	\$1.67	3.27%	3.57%
220	LaSalle St. Investment Advisors	Elmhurst, Ill.	963.43	10.24%	\$0.48	37.80%	-20.00%
221	Resource Management	Metairie, La.	953.69	13.53%	\$2.24	-13.18%	30.77%
222	Whitnell & Co.	Oak Brook, Ill.	940.42	-18.61%	\$2.01	-16.70%	-2.30%
223	Regal Investment Advisors	Kentwood, Mich.	935.11	4.26%	\$0.19	-36.28%	63.63%
224	Beird Harris	Dallas, Texas	923.55	17.35%	\$1.83	1.51%	15.60%
225	HCR Wealth Advisors	Los Angeles, Calif.	916.56	7.49%	\$1.71	-16.77%	29.16%
226	Willow Creek Wealth Management	Sebastopol, Calif.	903.68	15.52%	\$1.33	4.46%	10.59%
227	Girard Partners	King of Prussia, Pa.	902.23	32.92%	\$0.69	-13.23%	53.18%
228	Condor Capital Management	Martinsville, N.J.	900.54	6.43%	\$1.25	6.28%	0.14%
229	The Wealth Consulting Group (WCG)	Las Vegas, Nev.	894.39	95.13%	\$0.36	9.27%	78.57%
230	Bridgewater Wealth & Financial Management	Bethesda, Md.	894.06	10.51%	\$1.47	8.16%	2.18%
231	McKinley Carter Wealth Services	Wheeling, W.Va.	887.72	7.19%	\$1.09	2.83%	4.24%
232	CFS Investment Advisory Services	Totowa, N.J.	883.82	14.84%	\$2.15	12.89%	1.73%
233	EFS Advisors	Cambridge, Minn.	882.23	11.92%	\$0.09	9.75%	1.98%
234	Glassman Wealth Services	Vienna, Va.	881.35	11.55%	\$4.12	5.29%	5.94%
235	Novare Capital Management	Charlotte, N.C.	875.08	8.73%	\$3.37	2.45%	6.12%
236	Durbin Bennett Private Wealth Management	Austin, Texas	866.17	-0.67%	\$4.71	5.27%	-5.64%
237	TFC Financial Management	Boston, Mass.	849.00	7.74%	\$2.68	7.06%	0.63%
238	First Affirmative Financial Network	Colorado Springs, Colo.	833.47	-1.81%	\$0.19	-0.06%	-1.75%
239	Pekin Singer Strauss Asset Management	Chicago, Ill.	832.68	2.76%	\$1.67	2.76%	0.00%
240	HoyleCohen	San Diego, Calif.	823.13	4.69%	\$1.60	19.73%	-12.56%
241	Resnick Advisors	Westport, Conn.	808.97	1.50%	\$0.93	2.31%	-0.80%
242	Park Place Capital Management	Milwaukee, Wis.	802.08	1.80%	\$6.63	-7.45%	10.00%
243	Steinberg Global Asset Management	Boca Raton, Fla.	802.06	12.99%	\$2.35	4.40%	8.23%
244	Center For Financial Planning	Southfield, Mich.	800.50	9.85%	\$0.93	9.98%	-0.12%
245	Paragon Capital Management	Denver, Colo.	778.04	7.67%	\$5.26	5.49%	2.07%
246	Vigilant Capital Management	Portland, Maine	765.33	13.40%	\$3.11	10.63%	2.50%
247	Miracle Mile Advisors	Los Angeles, Calif.	753.00	59.20%	\$2.72	5.75%	50.54%
248	Austin Asset	Austin, Texas	746.00	17.11%	\$2.22	13.97%	2.75%
249	Delphi Private Advisors	San Diego, Calif.	746.00	37.77%	\$4.26	35.40%	1.74%
250	Meyer Capital Group	Marlton, N.J.	745.00	5.82%	\$1.05	5.37%	0.43%
251	Palisade Asset Management	Minneapolis, Minn.	736.44	6.55%	\$5.26	1.23%	5.26%
252	Warwick Partners	Bryan, Texas	733.15	7.72%	\$4.47	6.41%	1.23%
253	Kings Point Capital Management	Great Neck, N.Y.	732.94	2.57%	\$4.79	-8.15%	11.68%
254	Schechter Investment Advisors	Birmingham, Mich.	731.08	9.41%	\$4.84	-7.25%	17.97%
255	Capital Wealth Advisors	Naples, Fla.	717.48	105.63%	\$1.79	53.19%	34.23%
256	Doyle Wealth Management	St. Petersburg, Fla.	713.96	12.78%	\$1.06	-4.77%	18.42%
257	Main Street Research	Sausalito, Calif.	709.24	0.00%	\$1.42	-10.00%	11.11%
258	Professional Planning Group	Westerly, R.I.	707.44	-32.33%	\$0.39	-28.36%	-5.55%
259	Northern Oak Wealth Management	Milwaukee, Wis.	707.22	16.89%	\$2.09	3.45%	13.00%

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260	Column Capital	Indianapolis, Ind.	705.00	15.57%	\$2.82	1.70%	13.64%
261	Valley National Financial Advisors	Bethlehem, Pa.	698.25	14.84%	\$0.45	0.64%	14.11%
262	Lutz Financial Services	Omaha, Neb.	696.48	11.19%	\$1.54	29.10%	-13.88%
263	TRUE Private Wealth Advisors	Salem, Ore.	695.28	30.41%	\$0.70	27.54%	2.25%
264	AE Wealth Management	Topeka, Kan.	683.54	N/A	\$0.23	N/A	N/A
265	Bitterroot Capital Advisors	Bozeman, Mont.	677.35	19.84%	\$48.38	19.84%	0.00%
266	Paracle Advisors	Mercer Island, Wash.	676.29	8.35%	\$2.29	-2.67%	11.32%
267	Leonetti & Associates	Buffalo Grove, Ill.	672.02	2.82%	\$1.70	4.90%	-1.98%
268	SPC Financial	Rockville, Md.	669.36	2.25%	\$0.72	7.33%	-4.73%
269	C2P Capital Advisory Group	Westlake, Ohio	665.42	42.78%	\$0.33	-19.90%	78.25%
270	Medley & Brown	Ridgeland, Miss.	632.70	9.80%	\$1.22	6.41%	3.19%
271	Carnick & Kubik Group	Denver, Colo.	632.20	14.95%	\$1.35	-4.62%	20.51%
272	Van Hulzen Asset Management	El Dorado Hills, Calif.	624.79	21.32%	\$1.12	-4.68%	27.27%
273	Versant Capital Management	Phoenix, Ariz.	623.62	4.77%	\$3.06	1.18%	3.55%
274	Fusion Family Wealth	Woodbury, N.Y.	622.61	0.26%	\$2.65	4.52%	-4.08%
275	BT Wealth Management	Atlanta, Ga.	622.00	17.12%	\$2.96	3.17%	13.51%
276	Stevens Foster	Minneapolis, Minn.	615.00	-20.34%	\$1.54	-25.32%	6.67%
277	The McGowan Group Asset Management	Dallas, Texas	607.61	15.51%	\$0.76	15.51%	0.00%
278	Householder Group Estate & Retirement Specialists	Scottsdale, Ariz.	604.23	26.38%	\$0.16	-21.04%	60.06%
279	REDW Stanley Financial Advisors	Albuquerque, N.M.	603.33	6.21%	\$1.81	6.21%	0.00%
280	Hemington Wealth Management	Tysons Corner, Va.	598.50	34.34%	\$2.37	22.13%	10.00%
281	Weatherly Asset Management	Del Mar, Calif.	596.18	12.47%	\$1.82	6.30%	5.81%
282	Pinnacle Wealth Planning Services	Mansfield, Ohio	595.93	12.10%	\$1.17	6.83%	4.94%
283	Confluence Wealth Management	Portland, Ore.	593.00	0.78%	NM	NM	NM
284	Petersen Hastings Investment Management	Kennewick, Wash.	585.88	7.30%	\$1.01	1.58%	5.63%
285	Quadrant Family Wealth Advisors	Cincinnati, Ohio	582.36	11.96%	\$23.29	-1.47%	13.64%
286	Financial Synergies Asset Management	Houston, Texas	577.70	26.35%	\$1.56	9.62%	15.26%
287	Stepp & Rothwell	Overland Park, Kan.	575.02	3.19%	\$2.34	1.09%	2.07%
288	Aveo Capital Partners	Greenwood Village, Colo.	565.03	3.07%	\$0.79	3.50%	-0.42%
289	ACG Advisory Services	Midlothian, Va.	563.27	22.85%	\$2.14	20.99%	1.54%
290	Yeske Buie	San Francisco, Calif.	562.00	5.64%	\$2.29	5.64%	0.00%
291	Retirement Investment Advisors	Oklahoma City, Okla.	560.33	8.69%	\$0.53	7.16%	1.43%
292	Mosaic Financial Partners	San Francisco, Calif.	557.13	0.44%	\$2.42	-1.74%	2.22%
293	Archford Capital Strategies	Swansea, Ill.	549.21	17.17%	\$1.07	4.33%	12.31%
294	Redwood Wealth Management	Alpharetta, Ga.	543.92	24.99%	\$0.87	14.99%	8.70%
295	Platinum Wealth Partners	Tampa, Fla.	543.70	62.30%	\$0.39	39.11%	16.67%
296	Rathbone Warwick Investment Management	Boise, Idaho	543.10	16.94%	\$1.10	11.00%	5.35%
297	DiNuzzo Index Advisors	Beaver, Pa.	543.04	16.20%	\$0.72	6.81%	8.79%
298	Cable Hill Partners	Portland, Ore.	543.00	20.40%	\$1.37	3.37%	16.47%
299	Triad Hybrid Solutions	Norcross, Ga.	541.84	1328.72%	\$0.34	167.89%	433.33%
300	AJ Wealth	New York, N.Y.	536.71	45.48%	\$3.08	30.43%	11.54%
301	PDS Planning	Columbus, Ohio	528.26	15.34%	\$1.11	11.46%	3.49%
302	Burton Enright Welch	Walnut Creek, Calif.	526.36	60.14%	\$1.40	-6.05%	70.45%
303	CRA Financial	Northfield, N.J.	525.73	15.05%	\$1.07	7.10%	7.42%
304	The Insight Group	Salt Lake City, Utah	523.29	44.28%	\$1.73	29.94%	11.03%
305	Apriem Advisors	Irvine, Calif.	513.84	19.19%	\$0.98	3.78%	14.85%
306	O'Brien Wealth Partners	Boston, Mass.	508.72	12.74%	\$1.20	10.61%	1.93%
307	Triad Financial Advisors	Greensboro, N.C.	505.97	15.29%	\$0.80	7.42%	7.33%
308	Briaud Financial Advisors	College Station, Texas	505.76	2.99%	\$1.98	2.18%	0.79%
309	Ensemble Capital Management	Burlingame, Calif.	505.02	17.88%	\$4.39	33.26%	-11.54%
310	Aurum Wealth Management Group	Mayfield Village, Ohio	504.71	11.41%	\$2.22	1.11%	10.19%
311	Sunrise Advisors	Leawood, Kan.	502.00	19.08%	\$1.15	10.32%	7.94%

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312	Janiczek Wealth Management	Greenwood Village, Colo.	500.98	20.80%	\$2.16	16.63%	3.57%
ASSET CATEGORY: \$300 MILLION TO <\$500 MILLION							
313	Altium Wealth Management	Purchase, N.Y.	499.52	21.78%	\$0.83	1.48%	20.00%
314	Trustmont Advisory Group	Greensburg, Pa.	498.00	13.44%	\$0.36	13.44%	0.00%
315	Montis Financial	Waltham, Mass.	494.94	5.53%	\$3.44	1.87%	3.60%
316	Wagner Wealth Management	Denver, Colo.	493.65	8.96%	\$1.63	-6.86%	16.99%
317	Traphagen Financial Group	Oradell, N.J.	487.90	14.85%	\$0.45	14.11%	0.65%
318	Financial Advisory Corporation	Grand Rapids, Mich.	484.25	7.41%	\$2.85	1.09%	6.25%
319	Sather Financial Group	Victoria, Texas	481.39	14.89%	\$1.79	11.90%	2.67%
320	Lassus Wherley	New Providence, N.J.	479.32	6.27%	\$1.41	8.14%	-1.73%
321	The Sterling Group	Pasadena, Calif.	477.67	6.17%	\$1.31	-8.66%	16.24%
322	Southern Financial Group	Birmingham, Ala.	474.46	14.27%	\$0.51	18.08%	-3.23%
323	Blankinship & Foster	Solana Beach, Calif.	470.00	13.53%	\$1.99	8.72%	4.42%
324	Horan Capital Management	Hunt Valley, Md.	467.00	5.66%	\$0.65	5.95%	-0.28%
325	Moisand Fitzgerald Tamayo	Orlando, Fla.	466.49	17.42%	\$0.98	7.55%	9.17%
326	Concentus Wealth Advisors	King of Prussia, Pa.	465.00	6.65%	\$2.21	9.19%	-2.33%
327	Ruggie Wealth Management (Ruggie Capital Group)	Tavares, Fla.	457.95	35.15%	\$1.74	20.25%	12.39%
328	PJS Investment Management	Cedarburg, Wis.	457.84	5.50%	\$1.59	-4.76%	10.77%
329	Vintage Financial Services	Ann Arbor, Mich.	454.47	19.61%	\$1.04	8.39%	10.35%
330	ARS Wealth Advisors	St. Petersburg, Fla.	453.18	12.53%	\$1.03	2.30%	10.00%
331	Grant Street Asset Management	Canonsburg, Pa.	443.40	7.18%	\$2.22	12.54%	-4.76%
332	Nelson Roberts Investment Advisors	Menlo Park, Calif.	440.27	7.40%	\$2.94	-6.92%	15.38%
333	Ritholtz Wealth Management	New York, N.Y.	440.00	97.31%	\$1.04	-6.46%	110.95%
334	WealthSource Partners	Centennial, Calif.	436.85	NM	\$0.55	NM	NM
335	FJY Financial	Reston, Va.	436.77	9.64%	\$1.40	6.83%	2.63%
336	ClearRock Capital	Ketchum, Idaho	434.43	7.65%	\$1.61	15.62%	-6.90%
337	Financial Planning and Information Services	De Pere, Wis.	431.00	19.06%	\$0.52	15.07%	3.47%
338	Evermay Wealth Management	Arlington, Va.	427.23	7.77%	\$1.75	-4.59%	12.96%
339	Roof Advisory Group	Harrisburg, Pa.	426.14	6.02%	\$2.05	7.04%	-0.95%
340	MFA Asset Management	Tewksbury, Mass.	424.14	5.95%	\$4.24	-15.24%	25.00%
341	AM Global Family Investment Office	West Palm Beach, Fla.	423.01	26.39%	\$19.23	20.65%	4.76%
342	WorthPointe	Austin, Texas	423.00	19.15%	\$0.90	7.52%	10.82%
343	Jackson Financial Management	Costa Mesa, Calif.	421.18	6.34%	\$0.90	5.20%	1.08%
344	The Arkansas Financial Group	Little Rock, Ark.	417.54	13.05%	\$1.47	4.32%	8.37%
345	Smith Anglin Financial	Dallas, Texas	412.25	0.79%	\$0.59	-5.54%	6.71%
346	Sterling Financial Planning	Sparta, N.J.	408.37	7.79%	\$0.94	5.30%	2.36%
347	The Wealth Collaborative	Westlake Village, Calif.	406.81	8.24%	\$2.39	-7.68%	17.24%
348	Conlon Dart Wealth Management	Seattle, Wash.	404.73	11.59%	\$1.57	6.40%	4.88%
349	Lodestar Private Asset Management	Alamo, Calif.	404.66	12.23%	\$1.69	-8.81%	23.08%
350	Cahaba Wealth Management	Atlanta, Ga.	404.12	30.35%	\$0.98	18.67%	9.84%
351	Glass Jacobson Financial Group	Owings Mills, Md.	401.43	32.81%	\$0.94	15.43%	15.05%
352	SkyOak	Medford, Ore.	399.46	10.96%	\$1.14	1.45%	9.38%
353	Porter White Investment Advisors	Birmingham, Ala.	398.96	15.42%	\$4.20	12.99%	2.15%
354	Good Life Advisors ♦	Wyomissing, Pa.	390.94	-37.13%	\$0.06	-52.94%	33.60%
355	Ellis Investment Partners	Berwyn, Pa.	390.79	14.34%	\$0.85	3.15%	10.84%
356	Rappaport Reiches Capital Management	Skokie, Ill.	389.73	14.65%	\$1.63	1.22%	13.27%
357	The L. Warner Companies	Timonium, Md.	389.63	13.67%	\$1.62	8.93%	4.35%
358	Wealth Health	Roseland, N.J.	387.28	9.69%	\$2.15	6.65%	2.86%
359	Starfire Investment Advisers	Southfield, Mich.	384.80	10.90%	\$1.35	8.57%	2.14%
360	Droms Strauss Wealth Management	St. Louis, Mo.	383.00	8.19%	\$1.34	2.50%	5.56%
361	MainLine Private Wealth	Wynnewood, Pa.	377.54	24.48%	\$4.29	7.51%	15.79%
362	Blue Chip Partners	Farmington Hills, Mich.	374.72	23.17%	\$1.20	13.66%	8.36%

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♦ CORRECTION NOTE: Due to a reporting error by Good Life Advisors, its assets were incorrectly reported in the survey at \$390.94. The firm's assets as of Dec 31, 2016 should have listed as \$621.78, % growth in assets 2015-2016 as 59.05%; assets per client \$0.10; % in growth in assets per client as 19.04%.

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# FA's 2017 RIA RANKING

CAMBRIDGE

FlexShares  
Exchange Traded Funds

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363	Frisch Financial Group	Melville, N.Y.	370.74	10.75%	\$0.84	5.72%	4.76%
364	Investmark Advisory Group	Stratford, Conn.	368.00	19.48%	\$0.41	13.98%	4.82%
365	Balboa Wealth Partners	Newport Beach, Calif.	367.00	3570.00%	\$1.22	22.33%	2900.00%
366	ClearRock Capital	Ketchum, Idaho	366.97	10.20%	\$1.35	4.91%	5.04%
367	Insight Wealth Partners	Plano, Texas	364.60	9.95%	\$0.80	8.26%	1.56%
368	Willis Johnson & Associates	Houston, Texas	364.22	16.87%	\$1.73	-1.96%	19.21%
369	Waller Financial Planning Group	Columbus, Ohio	358.79	7.40%	\$0.72	7.40%	0.00%
370	WNY Asset Management	Williamsville, N.Y.	357.05	5.02%	\$0.20	1.50%	3.46%
371	Bernhardt Wealth Management	McLean, Va.	354.00	12.06%	\$1.77	5.33%	6.38%
372	Thor Investment Management	Cincinnati, Ohio	353.00	10.76%	\$0.95	4.77%	5.71%
373	Trilogy Capital	Huntington Beach, Calif.	350.53	NM	\$0.16	NM	4537.50%
374	Schiavi + Dattani	Wilmington, Del.	350.40	5.87%	\$2.28	4.50%	1.32%
375	J. W. Coons Advisors	Columbus, Ohio	343.20	4.58%	\$2.51	-5.35%	10.48%
376	Macro Consulting Group	Parsippany, N.J.	336.20	8.10%	\$0.75	8.10%	0.00%
377	BlueSky Wealth Advisors	New Bern, N.C.	335.73	-6.74%	\$1.31	2.37%	-8.90%
378	Ritter Daniher Financial Advisory	Cincinnati, Ohio	335.62	3.20%	\$1.08	3.20%	0.00%
379	Goodman Financial Corporation	Houston, Texas	326.92	11.70%	\$1.53	13.27%	-1.38%
380	Investment Partners	New Philadelphia, Ohio	323.65	7.76%	\$0.46	10.35%	-2.34%
381	KMH Wealth Management	Victoria, Texas	320.40	12.35%	\$0.86	2.73%	9.36%
382	FAI Wealth Management	Columbia, Md.	320.17	7.37%	\$1.53	3.77%	3.47%
383	Jentner Wealth Management	Akron, Ohio	319.46	13.85%	\$1.56	12.74%	0.99%
384	Birchwood Financial Partners	Edina, Minn.	315.35	9.78%	\$0.84	8.61%	1.08%
385	GFS Private Wealth	Clearwater, Fla.	314.00	7.17%	\$3.78	8.46%	-1.19%
386	Old Dominion Capital Management	Charlottesville, Va.	310.95	-1.86%	\$1.09	-4.94%	3.25%
387	Asset Management Advisors	Houston, Texas	310.78	3.53%	\$4.44	3.53%	0.00%
388	America First Investment Advisors	Omaha, Neb.	309.90	14.08%	\$1.14	10.30%	3.42%
389	Vestory	Bellevue, Wash.	308.67	36.66%	\$0.50	15.55%	18.27%
390	Wellesley Investment Partners	Wellesley, Mass.	307.15	30.77%	\$2.02	-2.78%	34.51%
391	Level Financial Advisors	Amherst, N.Y.	306.56	17.43%	\$0.55	8.56%	8.17%
392	William Mack & Associates	Troy, Mich.	306.08	19.67%	\$0.34	8.08%	10.73%
393	Anthony Smith Advisors	Atlanta, Ga.	305.40	7.80%	\$1.93	1.66%	6.04%
394	McNamara Financial Services	Marshfield, Mass.	304.97	-6.77%	\$0.42	-14.08%	8.51%
ASSET CATEGORY: \$100 MILLION TO <\$300 MILLION							
395	Titus Wealth Management	Larkspur, Calif.	295.68	75.20%	\$0.22	0.86%	73.71%
396	Hopwood Financial Services	Great Falls, Va.	292.98	9.62%	\$1.58	6.06%	3.35%
397	Socius Family Office	Fort Lauderdale, Fla.	287.54	37.60%	\$2.82	34.90%	2.00%
398	Hochman Cole Investment Advisors	Deerfield, Ill.	285.96	10.41%	\$1.83	0.50%	9.86%
399	Klaas Financial Asset Advisors	Loves Park, Ill.	284.00	21.37%	\$0.31	15.65%	4.95%
400	Signal Securities	Fort Worth, Texas	283.00	6.79%	\$0.32	-0.39%	7.21%
401	Peregrine Asset Advisers	Portland, Ore.	282.76	2.49%	\$0.85	3.72%	-1.19%
402	Sentinus	Oak Brook, Ill.	281.82	35.62%	\$0.87	-16.54%	62.50%
403	Wechter Feldman Wealth Management	Parsippany, N.J.	280.24	2.79%	\$1.80	4.11%	-1.27%
404	Cedar Rowe Partners	Atlanta, Ga.	278.52	16.06%	\$2.49	22.27%	-5.08%
405	WJ Interests	Sugar Land, Texas	274.00	13.22%	\$1.37	8.13%	4.71%
406	Red Door Wealth Management	Memphis, Tenn.	273.81	18.70%	\$1.44	-0.04%	18.75%
407	Woodward Financial Advisors	Chapel Hill, N.C.	272.67	29.32%	\$1.95	20.08%	7.69%
408	Mark Sheptoff Financial Planning	Glastonbury, Conn.	270.00	8.00%	\$1.15	3.40%	4.44%
409	Financial Symmetry	Raleigh, N.C.	270.00	17.18%	\$0.73	7.04%	9.47%
410	Financial Insights	Tacoma, Wash.	268.95	9.02%	\$0.53	7.50%	1.41%
411	WFA Wealth Managers	San Diego, Calif.	266.61	6.39%	\$0.89	9.22%	-2.59%
412	Heron Wealth	New York, N.Y.	266.25	29.63%	\$2.56	12.18%	15.56%
413	Financial Management Strategies	Valley View, Ohio	265.92	8.08%	\$0.33	-7.52%	16.86%

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414	Andrews, Lucia Wealth Management	San Mateo, Calif.	263.34	24.06%	\$1.80	11.31%	11.45%
415	American Wealth Management	Reno, Nev.	261.77	11.39%	\$0.44	11.39%	0.00%
416	The Asset Advisory Group	Cincinnati, Ohio	258.05	12.93%	\$1.39	5.00%	7.56%
417	Net Worth Advisory Group	Sandy, Utah	258.03	-0.13%	\$0.71	24.01%	-19.47%
418	Walsh & Associates	Sarasota, Fla.	257.46	7.27%	\$0.54	1.63%	5.56%
419	Court Place Advisors	Ellicott City, Md.	257.11	19.30%	\$0.98	14.74%	3.97%
420	Winch Financial	Appleton, Wis.	256.16	-2.21%	\$0.34	-0.42%	-1.80%
421	McAdam	Philadelphia, Pa.	251.03	34.82%	\$0.07	17.49%	14.75%
422	Integris Wealth Management	Monterey, Calif.	249.84	7.21%	\$1.91	-0.16%	7.38%
423	Monument Wealth Management	Alexandria, Va.	247.58	12.07%	\$0.99	0.86%	11.11%
424	Portfolio Wealth Advisors	Albuquerque, N.M.	245.39	18.65%	\$0.98	11.54%	6.38%
425	Hines Warner Wealth Management	Portland, Ore.	240.86	19.66%	\$1.51	7.62%	11.19%
426	McIlrath And Eck	Arlington, Wash.	240.00	45.45%	\$0.24	23.64%	17.65%
427	Next Generation Wealth Management	Milwaukee, Wis.	239.94	16.74%	\$1.05	8.08%	8.02%
428	Gierl Augustine Investment Management	Sarver, Pa.	239.79	8.73%	\$0.38	4.23%	4.33%
429	Core Capital Solutions	Naperville, Ill.	236.04	-0.85%	\$4.07	12.82%	-12.12%
430	CTS Financial Group	Chicago, Ill.	236.00	4.82%	\$0.67	-2.67%	7.69%
431	Destiny Capital	Lakewood, Colo.	235.38	6.42%	\$0.81	0.21%	6.20%
432	Meritas Wealth Management	Larkspur, Calif.	232.59	17.21%	\$1.52	11.08%	5.52%
433	Compass Financial Consulting	Atlanta, Ga.	230.95	11.52%	\$1.57	16.83%	-4.55%
434	Pinnacle Financial Group	Western Springs, Ill.	230.30	12.34%	\$0.89	3.70%	8.33%
435	Shamrock Asset Management	Dallas, Texas	228.51	-18.20%	\$0.46	-18.20%	0.00%
436	Align Wealth Management	Oklahoma City, Okla.	228.00	9.14%	\$1.30	-2.71%	12.18%
437	Castle Wealth Advisors	Indianapolis, Ind.	227.59	9.25%	\$1.22	2.24%	6.86%
438	Cascade Investment Group	Colorado Springs, Colo.	226.00	-5.04%	\$0.48	-14.17%	10.64%
439	McCarthy Asset Management	Redwood Shores, Calif.	225.43	5.27%	\$1.07	5.27%	0.00%
440	Allodium Investment Consultants	Minneapolis, Minn.	223.46	9.50%	\$1.85	-4.07%	14.15%
441	Grand Wealth Management	Grand Rapids, Mich.	222.02	18.66%	\$2.36	3.51%	14.63%
442	Asset Advisory Group	Kinnelon, N.J.	220.54	2.17%	\$1.87	-2.16%	4.42%
443	Asset Planning	Cypress, Calif.	220.26	9.42%	\$0.81	6.21%	3.02%
444	Regency Wealth Management	Ramsey, N.J.	220.00	28.65%	\$0.96	25.86%	2.22%
445	Mark J. Snyder Financial Services	Medford, N.Y.	219.42	12.28%	\$0.40	4.69%	7.25%
446	Poehling Capital Management	Madison, Wis.	218.19	8.90%	\$0.67	4.92%	3.80%
447	Piershale Financial Group	Crystal Lake, Ill.	217.14	-2.40%	\$0.54	-2.40%	0.00%
448	Century Wealth Management	Memphis, Tenn.	216.17	18.09%	\$2.92	11.70%	5.71%
449	The Advocates	Houston, Texas	214.88	17.07%	\$1.87	14.02%	2.68%
450	Camarda Wealth Advisors	Orange Park, Fla.	213.00	-4.05%	\$0.53	2.14%	-6.06%
451	Kaye Capital Management	Los Angeles, Calif.	212.84	15.00%	\$1.06	13.85%	1.01%
452	Searcy Financial Services	Overland Park, Kan.	212.69	14.63%	\$1.33	11.05%	3.23%
453	Horizon Advisors	Houston, Texas	208.67	4.84%	\$1.88	-0.83%	5.71%
454	Family Wealth Advisory Group	Cincinnati, Ohio	205.68	18.21%	\$1.40	17.40%	0.68%
455	M.C. Byrd Wealth Management	Bellville, Texas	204.07	13.48%	\$0.39	4.50%	8.60%
456	Resolute Financial	Newburyport, Mass.	204.01	21.81%	\$0.76	3.76%	17.39%
457	AlphaStar Capital Management	Cornelius, N.C.	203.60	36.74%	\$0.09	11.87%	22.22%
458	Westover Capital Advisors	Wilmington, Del.	201.66	13.16%	\$1.46	12.34%	0.73%
459	Baron Financial Group	Fair Lawn, N.J.	201.00	8.24%	\$0.68	-1.27%	9.63%
460	RMR Financial Advisors	Madison, Wis.	200.05	7.56%	\$1.58	16.87%	-7.97%
461	QP Consulting	Takoma Park, Md.	199.64	9.20%	\$4.99	20.12%	-9.09%
462	Palisade Investments	Stateline, Nev.	199.49	0.00%	\$0.85	-35.90%	56.00%
463	Rowland Carmichael Advisors	Scottsdale, Ariz.	199.33	2.63%	\$0.91	NM	NM
464	Raskob Kambourian Financial Advisors	Tucson, Ariz.	199.00	11.17%	\$1.11	3.76%	7.14%
465	Virtue Capital Management	Nashville, Tenn.	198.47	101.09%	\$0.25	-15.29%	137.39%

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466	Trinity Financial Advisors	Chicago, Ill.	197.78	3.15%	\$3.41	6.70%	-3.33%
467	1st Portfolio Wealth Advisors	Fairfax, Va.	197.42	11.35%	\$1.08	5.87%	5.17%
468	Hanseatic Management Services	Albuquerque, N.M.	197.00	-37.26%	\$8.21	-37.26%	0.00%
469	Fortune Wealth Management	Dallas, Texas	195.83	18.42%	\$1.09	7.17%	10.49%
470	The Lubitz Financial Group	Miami, Fla.	195.26	8.51%	\$1.55	5.07%	3.28%
471	LJCooper Capital Management	Orem, Utah	195.09	23.31%	\$0.34	0.95%	22.15%
472	Mutual Fund Management	Troy, Mich.	191.67	1.60%	\$0.78	-0.48%	2.08%
473	Elser Financial Planning	Indianapolis, Ind.	187.87	32.30%	\$1.54	9.53%	20.79%
474	Targeted Financial Services	Holmdel, N.J.	187.57	18.71%	\$0.40	7.71%	10.21%
475	Tim Looney Investments	Heathrow, Fla.	187.55	19.65%	\$0.60	38.95%	-13.89%
476	AOG Wealth Management	Great Falls, Va.	187.48	19.05%	\$0.99	5.27%	13.10%
477	Latitude Advisors	Vero Beach, Fla.	187.22	-11.51%	\$0.14	-9.84%	-1.85%
478	Smedley Financial Services	Salt Lake City, Utah	186.46	3.81%	\$0.22	4.55%	-0.71%
479	Claro Advisors	Boston, Mass.	185.60	22.91%	\$0.62	-18.06%	50.00%
480	MJB Asset Management	New York, N.Y.	185.29	16.65%	\$2.32	9.36%	6.67%
481	HFG Wealth Management	The Woodlands, Texas	185.22	31.71%	\$1.06	25.69%	4.79%
482	Asset Planning Corporation	Knoxville, Tenn.	185.00	9.02%	\$1.08	1.41%	7.50%
483	Investment Advisory Professionals	Boca Raton, Fla.	184.00	-2.65%	\$2.04	2.76%	-5.26%
484	Asset Planning Corporation	Knoxville, Tenn.	181.76	7.81%	\$1.08	2.70%	4.97%
485	Precipio Wealth Management	McLean, Va.	179.52	1.30%	\$1.80	1.30%	0.00%
486	Berno Financial Management	Cincinnati, Ohio	179.36	10.40%	\$1.79	18.13%	-6.54%
487	Chessman Wealth Strategies	Dallas, Texas	179.03	18.17%	\$0.78	13.03%	4.55%
488	Sentinel Wealth Management	Reston, Va.	178.71	14.26%	\$1.79	5.12%	8.70%
489	Wasserman Wealth Management	Farmington Hills, Mich.	177.32	21.73%	\$1.83	16.71%	4.30%
490	Perspective Wealth Partners	Boise, Idaho	175.27	21.29%	\$1.45	13.27%	7.08%
491	Apex Financial Advisors	Yardley, Pa.	174.60	16.04%	\$1.86	-13.59%	34.29%
492	MDK Financial Group	Houston, Texas	173.83	4.54%	\$0.36	-0.17%	4.72%
493	Heritage Way Advisors	Rockford, Ill.	173.22	12.74%	\$1.57	-1.61%	14.58%
494	Slayton Lewis	Chicago, Ill.	173.20	12.47%	\$3.09	10.46%	1.82%
495	Cornerstone Wealth Management	Westlake, Ohio	171.92	4.39%	\$0.63	2.10%	2.25%
496	Tull Financial Group	Chesapeake, Va.	171.19	1.94%	\$0.73	-2.43%	4.48%
497	Blue Ocean Strategic Capital	Syracuse, N.Y.	170.00	4.29%	\$0.43	0.38%	3.90%
498	Rainsberger Wealth Advisors	Colorado Springs, Colo.	166.79	22.53%	\$1.31	7.09%	14.41%
499	Trinity Financial Advisors	Worthington, Ohio	165.94	42.30%	\$1.69	29.23%	10.11%
500	Zuraw Financial Advisors	Greensboro, N.C.	165.93	16.33%	\$1.32	2.48%	13.51%
501	Pivotal Planning Group	Jericho, N.Y.	164.31	20.16%	\$1.08	5.14%	14.29%
502	Morling Financial Advisors	San Francisco, Calif.	164.08	22.96%	\$0.74	9.67%	12.12%
503	Argosy Wealth Management	Los Angeles, Calif.	163.48	19.95%	\$1.24	16.32%	3.13%
504	Legacy Consulting Group	Plano, Texas	163.47	-1.31%	\$1.63	-6.24%	5.26%
505	Fairfield Financial Advisors	Wellesley, Mass.	162.94	7.60%	\$1.81	-4.35%	12.50%
506	Miller Advisors	Kirkland, Wash.	161.88	9.01%	\$0.89	18.65%	-8.12%
507	Putney Financial Group	San Rafael, Calif.	160.14	8.55%	\$0.64	-10.12%	20.77%
508	Byrne Asset Management	Princeton, N.J.	160.00	3.23%	\$1.00	0.00%	3.23%
509	Sard Wealth Management Group	Atlanta, Ga.	159.91	7.82%	\$1.00	8.49%	-0.62%
510	Wilsey Asset Management	San Diego, Calif.	157.75	3.80%	\$0.39	-9.17%	14.29%
511	Paragon Financial Advisors	College Station, Texas	157.60	7.77%	\$0.95	-0.67%	8.50%
512	Harbor Financial Group	Boulder, Colo.	157.40	9.14%	\$1.26	8.27%	0.81%
513	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	155.00	-8.82%	\$0.51	35.41%	-32.67%
514	JVL Associates	Wyoming, Mich.	153.42	11.75%	\$4.79	4.76%	6.67%
515	Empyrion Wealth Management	Roseville, Calif.	151.44	12.03%	\$1.94	13.46%	-1.27%
516	Samalin Investment Counsel	Chappaqua, N.Y.	151.38	14.89%	\$0.66	17.90%	-2.55%
517	Hammond Iles Wealth Advisors	Wethersfield, Conn.	150.44	-18.98%	\$0.25	1.44%	-20.13%

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# FA's 2017 RIA RANKING

CAMBRIDGE

FlexShares  
Exchange Traded Funds

2016 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2016 ASSETS (\$MM)*	% GROWTH IN ASSETS 2015-2016	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
518	Pacific Capital	Corona, Calif.	150.00	3.45%	\$2.00	-3.45%	7.14%
519	Mullooly Asset Management	Wall, N.J.	149.53	8.50%	\$0.24	4.68%	3.64%
520	Armstrong, Dixon, Exelby (ADE)	Baltimore, Md.	148.55	41.84%	\$0.50	-5.44%	50.00%
521	Covenant Wealth Advisors	Williamsburg, Va.	148.43	13.18%	\$1.16	10.53%	2.40%
522	Blackhawk Capital Partners	Thiensville, Wis.	147.52	2.60%	\$0.55	1.08%	1.50%
523	Duncan Williams Asset Management	Memphis, Tenn.	146.91	12.93%	\$0.87	36.46%	-17.24%
524	Life Planning Partners	Jacksonville, Fla.	146.29	29.39%	\$1.68	16.00%	11.54%
525	Maltin Wealth Management	Paramus, N.J.	146.15	13.74%	\$1.17	7.37%	5.93%
526	Barnett Financial	Austin, Texas	142.34	10.67%	\$2.19	-4.65%	16.07%
527	Hilton Head Financial Advisors	Hilton Head, S.C.	141.34	11.62%	\$1.00	11.62%	0.00%
528	Professional Financial Strategies	Pittsford, N.Y.	141.09	7.96%	\$1.43	1.42%	6.45%
529	Brown Financial Advisory	Fairhope, Ala.	140.74	18.53%	\$0.76	12.73%	5.14%
530	Foresight Capital Management Advisors	Saline, Mich.	139.94	9.87%	\$0.56	-15.52%	30.05%
531	Wealthview Capital	Jackson, Miss.	138.00	15.00%	\$0.86	15.00%	0.00%
532	Spraker Wealth Management	Maitland, Fla.	137.18	2.61%	\$1.29	2.61%	0.00%
533	Banker Investment Group	West Lafayette, Ind.	135.67	8.65%	\$0.46	43.63%	-24.36%
534	YIM Investment Management	Honolulu, Hawaii	135.31	32.15%	\$0.27	32.15%	0.00%
535	Charleston Financial Advisors	Charleston, S.C.	135.10	21.12%	\$1.04	53.73%	-21.21%
536	Private Capital Management	Larkspur, Calif.	135.05	5.98%	\$3.14	-1.41%	7.50%
537	Spectrum Investment Advisors	Mequon, Wis.	135.03	17.32%	\$0.59	-3.08%	21.05%
538	Macke Financial Advisory Group	Fort Myers, Fla.	132.43	-4.28%	\$1.39	0.76%	-5.00%
539	Auour Investments	Wenham, Mass.	131.35	73.18%	\$0.76	0.69%	72.00%
540	Pauley Financial	Austin, Texas	129.85	19.78%	\$1.53	-16.86%	44.07%
541	Sharper & Granite	El Segundo, Calif.	128.50	22.97%	\$1.74	19.64%	2.78%
542	Sebold Capital Management	Naperville, Ill.	128.28	11.78%	\$1.21	12.84%	-0.93%
543	Bonner & Smith	Lubbock, Texas	128.03	7.70%	\$0.68	2.57%	5.00%
544	Whitcomb & Hess Inc	Ashland, Ohio	128.00	10.34%	\$0.16	9.93%	0.38%
545	Arista Wealth Advisors	Albany, N.Y.	127.71	10.45%	\$1.01	10.45%	0.00%
546	Kemp Financial Management	Fullerton, Calif.	127.53	10.28%	\$0.82	6.01%	4.03%
547	Crossgate Wealth Advisors	Yardley, Pa.	125.72	13.44%	\$1.04	5.94%	7.08%
548	TABR Capital Management	Orange, Calif.	125.62	-0.36%	\$0.55	1.37%	-1.71%
549	Financial Management Concepts	Winter Springs, Fla.	125.25	3.12%	\$0.85	-0.36%	3.50%
550	Centerline Wealth Advisors	Louisville, Ky.	124.77	5.74%	\$0.59	-0.25%	6.00%
551	SiligmueLLer & Norvid Wealth Advisors	Glen Ellyn, Ill.	120.52	10.63%	\$1.59	3.35%	7.04%
552	Cornerstone Wealth Advisors	Overland Park, Kan.	119.10	9.51%	\$1.19	9.51%	0.00%
553	Royal Capital Management	Boca Raton, Fla.	117.66	2.20%	\$1.29	-3.42%	5.81%
554	Fortune Financial Advisors	Overland Park, Kan.	117.29	-7.80%	\$0.28	-13.27%	6.31%
555	Focus Financial Advisors	Rockford, Ill.	117.28	2.87%	\$0.71	2.87%	0.00%
556	Beacon Financial Advisors	Rye Brook, N.Y.	116.73	10.15%	\$2.85	12.84%	-2.38%
557	Fidato Wealth	Strongsville, Ohio	114.07	53.70%	\$0.45	32.35%	16.13%
558	Fiduciary Wealth Management	Alexandria, Va.	113.27	175.47%	\$0.64	29.91%	112.05%
559	Robert Gordon & Associates	Springfield, Ill.	112.00	4.67%	\$0.24	0.01%	4.67%
560	Ivy League Financial Advisors	Rockville, Md.	111.97	3.08%	\$1.10	6.12%	-2.86%
561	Summit Place Financial Advisors	Summit, N.J.	110.39	6.46%	\$5.81	6.46%	0.00%
562	Investor's Capital Management	Menlo Park, Calif.	109.15	4.57%	\$1.76	13.00%	-7.46%
563	GW Financial	Costa Mesa, Calif.	107.60	13.26%	\$0.74	7.01%	5.84%
564	Clay Northam Wealth Management	Seal Beach, Calif.	107.00	12.63%	\$0.36	8.88%	3.45%
565	Artemis Financial Advisors	Boston, Mass.	105.81	13.61%	\$3.78	-2.62%	16.67%
566	Veripax Financial Management	Folsom, Calif.	105.00	43.84%	\$0.70	34.25%	7.14%
567	Colman Knight Advisory Group	Carlisle, Mass.	101.01	9.78%	\$1.51	6.50%	3.08%
568	BrightPath Wealth Planning	Camarillo, Calif.	100.05	18.54%	\$1.02	12.49%	5.38%
569	Miramontes Capital	Irvine, Calif.	100.03	29.10%	\$0.22	-5.34%	36.39%

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# FA's 2017 RIA RANKING

CAMBRIDGE

FlexShares  
Exchange Traded Funds

2016 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2016 ASSETS (\$MM)*	% GROWTH IN ASSETS 2015-2016	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
<b>ASSET CATEGORY: &lt;\$100 MILLION</b>							
570	Paragon Wealth Management	Provo, Utah	94.92	2.95%	\$0.70	6.00%	-2.88%
571	Ron Beaton's Money Matters	Paducah, Ky.	93.97	10.66%	\$1.52	7.09%	3.33%
572	HCO Private Wealth	Roanoke, Va.	93.00	21.15%	\$1.09	28.27%	-5.56%
573	Ledge Wealth Management	Sartell, Minn.	91.95	44.80%	\$0.59	-6.58%	55.00%
574	Cathy Pareto And Associates	Coral Gables, Fla.	91.80	9.14%	\$0.81	7.21%	1.80%
575	Purtill Financial	Highland Heights, Ohio	91.41	16.96%	\$0.68	11.73%	4.69%
576	Hixon Zuercher Capital Management	Findlay, Ohio	91.37	27.41%	\$0.43	22.62%	3.90%
577	Caissa Wealth Strategies	Minneapolis, Minn.	90.00	15.38%	\$1.29	2.20%	12.90%
578	Financial Advisory Services	Hanover, Pa.	88.83	26.90%	\$0.36	14.21%	11.11%
579	Gold Medal Waters	Boulder, Colo.	88.66	21.59%	\$0.86	15.69%	5.10%
580	Shira Ridge Wealth Management	Larkspur, Calif.	87.00	27.94%	\$0.73	6.62%	20.00%
581	Landmark Wealth Management	Melville, N.Y.	85.94	0.00%	\$0.61	-28.57%	40.00%
582	Granite Financial Group	Brookfield, Wis.	83.00	11.04%	\$0.40	8.87%	1.99%
583	Tandem Investment Partners	Princeton, N.J.	79.74	6.61%	\$0.57	-4.05%	11.11%
584	Wealth Financial Advisory Services	Buffalo Grove, Ill.	78.00	51.87%	\$0.20	8.21%	40.35%
585	Sage Future Financial	Albuquerque, N.M.	76.85	3.13%	\$1.92	-2.03%	5.26%
586	Korving & Company	Suffolk, Va.	75.06	10.05%	\$0.50	4.92%	4.90%
587	The Blakeley Group	Santa Clara, Calif.	75.00	12.78%	\$0.84	24.19%	-9.18%
588	RHS Financial	San Francisco, Calif.	74.90	15.05%	\$0.75	4.70%	9.89%
589	Murphy Capital Advisors	Goodyear, Ariz.	74.18	23.40%	\$1.03	16.55%	5.88%
590	Elderado Financial	Montrose, Colo.	71.70	4.17%	\$0.32	-5.09%	9.76%
591	Northvest	Keene, N.H.	71.00	1.43%	\$1.42	-2.63%	4.17%
592	Lighthouse Wealth Management	Ashland, Ohio	70.74	14.65%	\$0.25	13.44%	1.06%
593	Lexington Avenue Capital Management	New City, N.Y.	70.32	14.96%	\$0.99	6.86%	7.58%
594	Falcon Wealth Planning	Ontario, Calif.	69.00	101.43%	\$1.10	414.76%	-60.87%
595	Financial Perspectives	San Ramon, Calif.	63.23	2.84%	\$0.51	2.84%	0.00%
596	North Forty Two & Co.	Lake Oswego, Ore.	59.50	16.32%	\$1.08	-0.60%	17.02%
597	Kotys Wealth Professionals	Valparaiso, Ind.	58.80	3.13%	\$0.26	-8.33%	12.50%
598	Quartz Partners Investment Management	Troy, N.Y.	57.73	4.52%	\$0.16	-3.40%	8.21%
599	Ralicki Wealth Management & Trust Services	Stuart, Fla.	57.66	21.02%	\$0.81	15.91%	4.41%
600	Waverley Wealth Management	Mountain View, Calif.	56.25	38.54%	\$0.80	34.59%	2.94%
601	Chilmark Financial Advisors	Miami, Fla.	56.24	7.63%	\$0.80	10.70%	-2.78%
602	Inspire Investing	Hollister, Calif.	55.85	131.36%	\$0.15	36.72%	69.23%
603	Williams Wealth Management Group I	Bradenton, Fla.	54.10	19.29%	\$0.22	7.36%	11.11%
604	High Country Capital Management	Crested Butte, Colo.	53.45	73.93%	\$0.33	25.91%	38.14%
605	Foundation Wealth Management	Media, Pa.	51.52	14.21%	\$0.95	1.52%	12.50%
606	Graf Financial	Baton Rouge, La.	49.40	5.33%	\$0.82	-3.45%	9.09%
607	Sommers Financial Management	St. Helens, Ore.	46.00	9.52%	\$0.19	4.96%	4.35%
608	CIS Wealth Management	New Braunfels, Texas	45.91	-3.10%	\$0.19	-11.18%	9.09%
609	GCI Financial Group	Mendham, N.J.	44.94	24.04%	\$0.60	19.08%	4.17%
610	Caitlin John Private Wealth Management	Brighton, Mich.	44.00	33.33%	\$0.18	4.00%	28.21%
611	Meritas Advisors	San Rafael, Calif.	40.00	14.29%	\$0.98	0.35%	13.89%
612	Steward Advisors	Chicago, Ill.	39.82	19.80%	\$0.85	9.61%	9.30%
613	East Horizon Investments	Cambridge, Mass.	37.36	99.46%	\$0.58	55.83%	28.00%
614	Singletrack Investments	Park City, Utah	37.12	10.10%	\$0.63	15.70%	-4.84%
615	Financial Strategies Group	Dallas, Texas	36.50	23.31%	\$0.65	5.69%	16.67%
616	Safe Harbor Asset Management	Huntington, N.Y.	35.07	-26.70%	\$0.48	-46.78%	37.74%
617	Oak Street Advisors	Myrtle Beach, S.C.	34.57	13.79%	\$0.38	11.29%	2.25%
618	Synergy Wealth Management	Grand Rapids, Mich.	34.16	87.93%	\$0.21	3.25%	82.02%
619	Chacon Diaz And DiVirgilio Wealth Management	Gainesville, Fla.	34.00	13.33%	\$0.23	2.00%	11.11%
620	Hofer & Associates	Thousand Oaks, Calif.	30.00	NM	\$0.25	NM	NM

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# FA's 2017 RIA RANKING



2016 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2016 ASSETS (\$MM)*	% GROWTH IN ASSETS 2015-2016	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
621	WWA Planning & Investments	Columbus, Ind.	29.93	0.00%	\$0.64	2.13%	-2.08%
622	Timmons Wealth Management	Attleboro, Mass.	28.52	79.33%	\$0.45	39.48%	28.57%
623	Fourth Dimension Financial Group	Perrysburg, Ohio	27.00	35.00%	\$0.25	4.32%	29.41%
624	Constant Guidance Financial	North Attleboro, Mass.	22.90	126.69%	\$0.22	51.13%	50.00%
625	Townsend Financial Planning	Mt. Sterling, Ky.	22.56	NM	\$0.45	NM	-33.33%
626	Private Client Wealth Advisors	Denver, Colo.	22.50	30.43%	\$0.56	-2.17%	33.33%
627	Integrated Retirement Strategies	Oregon City, Ore.	21.96	23.85%	\$0.65	9.28%	13.33%
628	MF Advisers	Dallas, Pa.	17.15	15.18%	\$0.14	6.82%	7.83%
629	Freitag Financial Group	Charlotte, N.C.	15.71	15.99%	\$0.52	-7.21%	25.00%
630	Clearview Financial Consulting	South Windsor, Conn.	12.65	8.82%	\$0.49	-7.92%	18.18%
631	Dukes Financial Group	Charlotte, N.C.	8.55	8.43%	\$0.45	-2.99%	11.76%
632	Afterburner Financial	Round Rock, Texas	6.53	51.55%	\$0.20	1.03%	50.00%
633	The Rule Wealth Management	Louisville, Ohio	5.02	-14.92%	\$0.03	-10.44%	-5.00%
634	Lindy S Diamond, Personal Financial Services	San Marcos, Calif.	4.74	95.25%	\$0.79	95.25%	0.00%
635	Atherean Wealth Management	Jersey City, N.J.	2.53	40.18%	\$0.14	9.03%	28.57%
636	VIMOCR – Vassalotti Investment Management	Duncansville, Pa.	2.11	17.14%	\$0.05	8.96%	7.50%
637	Carthage Financial Group	Quincy, Mass.	1.90	11.76%	\$0.08	11.76%	0.00%
638	Aurora Startegic Advisors	Lumberton, N.C.	1.20	1233.33%	\$0.03	233.33%	300.00%

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# TOP 50 FASTEST-GROWING FIRMS

With More  
Than \$250 Million  
in AUM

GROWTH RANK	FIRM NAME	LOCATION	2016 CLIENTS	YEAR END 2016 ASSETS (\$MM)	% GROWTH IN ASSETS 2015-2016	% GROWTH IN ASSETS PER CLIENT
1	Zeke Capital Advisors	Berwyn, Pa.	45	5,448.19	150.57%	323.18%
2	Capital Wealth Advisors	Naples, Fla.	400	717.48	105.63%	53.19%
3	Cornerstone Advisory	Hunt Valley, Md.	590	991.07	100.55%	21.35%
4	Ritholtz Wealth Management	New York, N.Y.	424	440.00	97.31%	-6.46%
5	The Wealth Consulting Group (WCG)	Las Vegas, Nev.	2,500	894.39	95.13%	9.27%
6	Sequoia Financial Group	Akron, Ohio	1,985	2,749.97	80.49%	37.39%
7	Titus Wealth Management	Larkspur, Calif.	1,315	295.68	75.20%	0.86%
8	Strategic Wealth Advisors Group	Sacramento, Calif.	8,000	2,269.35	72.99%	72.99%
9	LeafHouse Financial Advisors	Austin, Texas	370	1,500.00	65.48%	11.81%
10	Platinum Wealth Partners	Tampa, Fla.	1,400	543.70	62.30%	39.11%
11	Burton Enright Welch	Walnut Creek, Calif.	375	526.36	60.14%	-6.05%
12	Tiedemann Wealth Management	New York, N.Y.	438	8,224.72	59.29%	-45.09%
13	Miracle Mile Advisors	Los Angeles, Calif.	277	753.00	59.20%	5.75%
14	MCF Advisors	Covington, Ky.	1,942	1,376.01	58.74%	93.97%
15	Pathstone Federal Street	Fort Lee, N.J.	334	8,543.93	55.17%	-14.05%
16	Wealth Enhancement Advisory Services	Plymouth, Minn.	9,743	5,800.00	51.62%	37.72%
17	AJ Wealth	New York, N.Y.	174	536.71	45.48%	30.43%
18	Gradient Investments	Arden Hills, Minn.	8,937	1,258.15	44.61%	9.40%
19	The Insight Group	Salt Lake City, Utah	302	523.29	44.28%	29.94%
20	C2P Capital Advisory Group	Westlake, Ohio	2,000	665.42	42.78%	-19.90%
21	RMB Capital Management	Chicago, Ill.	1,487	5,222.07	42.71%	31.10%
22	Adviser Investments	Newton, Mass.	3,011	4,816.96	41.96%	37.15%
23	Delphi Private Advisors	San Diego, Calif.	175	746.00	37.77%	35.40%
24	Socius Family Office	Fort Lauderdale, Fla.	102	287.54	37.60%	34.90%
25	Arlington Family Offices	Birmingham, Ala.	95	1,527.81	37.31%	28.64%
26	Vestory	Bellevue, Wash.	615	308.67	36.66%	15.55%
27	Sentinus	Oak Brook, Ill.	325	281.82	35.62%	-16.54%
28	Larson Financial Group	Saint Louis, Mo.	5,569	1,041.43	35.57%	23.43%
29	Ruggie Wealth Management (Ruggie Capital Group)	Tavares, Fla.	263	457.95	35.15%	20.25%
30	McAdam	Philadelphia, Pa.	3,500	251.03	34.82%	17.49%
31	Merriman Wealth Management	Seattle, Wash.	1,902	2,011.74	34.61%	13.95%
32	Hemington Wealth Management	Tysons Corner, Va.	253	598.50	34.34%	22.13%
33	Girard Partners	King of Prussia, Pa.	1,302	902.23	32.92%	-13.23%
34	Glass Jacobson Financial Group	Owings Mills, Md.	428	401.43	32.81%	15.43%
35	Parallel Advisors	San Francisco, Calif.	1,489	1,377.40	32.80%	7.38%
36	Creative Planning	Leawood, Kan.	15,000	22,003.06	32.68%	-2.70%
37	Annex Wealth Management	Elm Grove, Wis.	4,264	1,381.51	32.54%	13.46%
38	Reilly Financial Advisors	La Mesa, Calif.	880	1,023.64	31.55%	18.09%
39	Wellesley Investment Partners	Wellesley, Mass.	152	307.15	30.77%	-2.78%
40	TRUE Private Wealth advisors	Salem, Ore.	1,000	695.28	30.41%	27.54%
41	Cahaba Wealth Management	Atlanta, Ga.	413	404.12	30.35%	18.67%
42	Colorado Financial Management	Boulder, Colo.	650	1,300.00	30.00%	20.00%
43	Heron Wealth	New York, N.Y.	104	266.25	29.63%	12.18%
44	EP Wealth Advisors	Torrance, Calif.	2,275	2,530.88	29.45%	8.11%
45	Woodward Financial Advisors	Chapel Hill, N.C.	140	272.67	29.32%	20.08%
46	Kovack Advisors	Fort Lauderdale, Fla.	7,900	1,690.76	28.39%	-12.24%
47	Hartland & Co.	Cleveland, Ohio	676	3,226.64	27.71%	18.08%
48	RTD Financial Advisors	Philadelphia, Pa.	568	1,250.18	27.58%	3.54%
49	Modera Wealth Management	Westwood, N.J.	980	2,075.00	26.52%	15.55%
50	AM Global Family Investment Office	West Palm Beach, Fla.	22	423.01	26.39%	20.65%