

FINANCIAL ADVISOR

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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%