



# FA's RIA RANKING 2012

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*Financial  
Group*

# FA'S 2012 RIA RANKING

(By Total Assets)

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2011 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2011 ASSETS (\$MM)	% GROWTH IN ASSETS 2010-2011	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
<b>ASSET CATEGORY: \$1 BILLION AND OVER</b>							
1	Hall Capital Partners	San Francisco, Calif.	21,758.38	0.81	164.84	-1.48	2.33
2	GenSpring Family Offices	Jupiter, Fla.	17,446.37	-12.35	26.68	-1.49	-11.02
3	Moneta Group	Clayton, Mo.	11,006.63	0.48	4.28	-8.63	9.97
4	First Republic Private Wealth Management	San Francisco, Calif.	10,968.28	72.31	3.19	29.22	33.35
5	Mariner Holdings/Mariner Wealth Advisors	Leawood, Kan.	10,866.16	32.35	3.99	-37.52	111.83
6	Oxford Financial Group	Indianapolis, Ind.	10,007.41	-4.15	15.40	17.97	-18.75
7	Plante Moran Financial Advisors	Southfield, Mich.	6,956.50	3.61	3.51	0.11	3.50
8	Convergent Wealth Advisors	Potomac, Md.	6,913.46	-33.47	25.32	-17.88	-18.99
9	Johnson Investment Counsel	Cincinnati, Ohio	6,766.25	15.94	2.64	14.22	1.51
10	Edelman Financial Services	Fairfax, Va.	6,505.00	19.05	0.40	2.89	15.71
11	Ronald Blue & Co.	Atlanta, Ga.	6,440.16	10.39	0.76	-3.81	14.76
12	The Mutual Fund Store	Overland Park, Kan.	6,124.72	3.03	0.19	-3.74	7.04
13	BBR Partners	New York, N.Y.	5,744.40	6.54	72.71	-2.90	9.72
14	United Capital Financial Advisers	Newport Beach, Calif.	5,575.82	35.09	0.56	-5.44	42.86
15	myCIO Wealth Partners	Philadelphia, Pa.	5,544.26	4.31	11.18	-2.63	7.13
16	DiMeo Schneider & Associates	Chicago, Ill.	4,755.80	N/A	17.29	N/A	8.70
17	Innovest Portfolio Solutions	Denver, Colo.	4,652.40	16.66	26.28	7.44	8.59
18	Beacon Pointe Advisors	Newport Beach, Calif.	4,535.29	12.93	4.38	-18.90	39.25
19	Aspiriant	Los Angeles, Calif.	4,389.08	-3.72	9.24	-7.17	3.71
20	RSM McGladrey	Minneapolis, Minn.	4,157.25	22.78	1.34	24.60	-1.46
21	Federal Street Advisors	Boston, Mass.	3,790.81	-8.83	50.54	4.55	-12.79
22	Cornerstone Advisors Asset Management	Bethlehem, Pa.	3,771.85	13.70	31.96	5.99	7.27
23	The Presidio Group	San Francisco, Calif.	3,730.00	2.69	23.17	16.09	-11.54
24	Gresham Partners	Chicago, Ill.	3,663.60	24.67	52.34	22.89	1.45
25	Clarfeld Wealth Strategist & Financial Confidantes	Tarrytown, N.Y.	3,660.00	6.37	10.93	3.19	3.08
26	GW & Wade	Wellesley, Mass.	3,641.58	9.66	1.81	6.77	2.71
27	Ballentine Partners	Waltham, Mass.	3,620.88	4.61	30.43	-5.06	10.19
28	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	3,466.04	14.49	7.13	8.13	5.88
29	Lake Street Advisors	Boston, Mass.	3,465.00	13.02	67.94	-2.49	15.91
30	Sontag Advisory	New York, N.Y.	3,331.74	-43.29	3.02	-47.51	8.04
31	Evercore Wealth Management	New York, N.Y.	3,267.43	28.94	9.26	-14.53	50.85
32	Tiedemann Wealth Management	New York, N.Y.	3,249.76	36.89	36.11	29.28	5.88
33	Welch & Forbes	Boston, Mass.	3,185.04	0.86	3.87	1.23	-0.36
34	Symmetry Partners	Glastonbury, Conn.	3,029.00	8.07	0.14	-23.32	40.94
35	Wetherby Asset Management	San Francisco, Calif.	3,013.11	4.89	6.04	0.47	4.39
36	Bartlett & Co.	Cincinnati, Ohio	2,875.36	2.87	1.14	5.15	-2.17
37	Altair Advisers	Chicago, Ill.	2,833.81	7.24	13.12	7.24	0.00
38	Massey Quick & Co.	Morristown, N.J.	2,832.64	-5.19	18.39	8.97	-12.99
39	Signature	Norfolk, Va.	2,504.37	16.08	15.36	8.24	7.24
40	Hewins Financial Advisors	San Mateo, Calif.	2,496.82	9.37	2.97	1.05	8.24
41	RMB Capital Management	Chicago, Ill.	2,452.75	23.45	2.60	9.96	12.26
42	Tolleson Wealth Management	Dallas, Texas	2,411.14	6.00	23.64	-1.27	7.37
43	RegentAtlantic Capital	Morristown, N.J.	2,369.96	14.46	2.37	3.47	10.62
44	Homrich Berg	Atlanta, Ga.	2,266.83	7.98	2.73	-2.43	10.67
45	Mill Creek Capital Advisors	Conshohocken, Pa.	2,250.77	12.45	23.69	-11.22	26.67
46	Bingham, Osborn & Scarborough	San Francisco, Calif.	2,200.00	0.00	2.72	-1.98	2.02
47	Harris SBSB	McLean, Va.	2,155.00	1.56	2.27	-3.79	5.56

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48	Arlington Family Offices	Birmingham, Ala.	2,107.71	2.12	52.69	-0.43	2.56
49	Signature Estate & Investment Advisors	Los Angeles, Calif.	2,105.56	13.64	1.03	14.03	-0.34
50	MAI Wealth Advisors	Cleveland, Ohio	2,095.65	5.04	3.40	2.31	2.67
51	Molewski Financial Partners	Bethlehem, Pa.	2,061.95	13.16	15.16	17.32	-3.55
52	Savant Capital	Rockford, Ill.	2,044.01	4.83	0.88	-5.08	10.44
53	Silver Bridge	Boston, Mass.	1,980.41	9.70	3.98	-11.27	23.63
54	Kovitz Investment Group	Chicago, Ill.	1,977.23	11.83	2.13	8.83	2.76
55	Dowling & Yahnke	San Diego, Calif.	1,976.86	19.37	2.29	1.92	17.12
56	Highmount	New York, N.Y.	1,969.11	4.89	19.69	-11.89	19.05
57	Heck Capital Advisors	Rhineland, Wis.	1,856.11	-7.71	3.23	-14.94	8.49
58	Balasa Dinverno Foltz	Itasca, Ill.	1,855.24	6.2	42.31	-1.56	7.92
59	Clifford Swan Investment Counsel	Pasadena, Calif.	1,829.32	0.75	2.52	6.71	-5.58
60	American Portfolios Advisors	Holbrook, N.Y.	1,825.00	51.66	0.17	24.09	22.22
61	South Texas Money Management	San Antonio, Texas	1,817.80	-5.68	1.42	0.23	-5.90
62	First Foundation Advisors	Irvine, Calif.	1,813.80	18.35	1.58	11.56	6.09
63	Wilbanks, Smith & Thomas Asset Management	Norfolk, Va.	1,775.25	-0.49	1.27	-14.70	16.67
64	Manchester Capital Management	Manchester, Vt.	1,762.47	3.66	11.02	-2.82	6.67
65	Joel Isaacson & Co.	New York, N.Y.	1,748.60	-0.18	2.05	-8.72	9.36
66	WMS Partners	Towson, Md.	1,691.17	12.93	6.22	-1.18	14.29
67	Meristem LLP	Minneapolis, Minn.	1,650.58	7.08	5.83	4.05	2.91
68	Crescent Capital Consulting	New Orleans, La.	1,620.91	14.01	35.24	-23.17	48.39
69	Brighton Jones	Seattle, Wash.	1,604.00	-4.81	3.04	10.91	-14.17
70	Laird Norton Tyee	Seattle, Wash.	1,599.97	-9.29	3.89	-9.51	0.24
71	Badgley Phelps Investment Managers	Seattle, Wash.	1,594.41	0.71	3.81	-0.50	1.21
72	LVW Advisors	Pittsford, N.Y.	1,564.52	†	42.28	†	†
73	Plancorp	St. Louis, Mo.	1,560.00	0.04	2.39	2.04	-1.95
74	Budros, Ruhlin & Roe	Columbus, Ohio	1,540.09	5.64	2.47	-0.46	6.12
75	Weston Financial Group	Wellesley, Mass.	1,514.96	-11.86	1.48	-8.34	-3.84
76	Index Funds Advisors	Irvine, Calif.	1,440.00	7.87	0.82	-7.54	16.67
77	WTAS	McLean, Va.	1,425.75	12.55	8.15	-12.54	28.68
78	Telemus Capital Partners	Southfield, Mich.	1,404.26	-25.12	1.71	-26.75	2.24
79	Westmount Asset Management	Los Angeles, Calif.	1,365.55	17.59	1.75	12.02	4.97
80	JMG Financial Group	Oak Brook, Ill.	1,330.51	6.32	2.62	-7.94	15.49
81	The Colony Group	Boston, Mass.	1,329.08	4.73	1.58	0.49	4.22
82	Wipfli Hewins Investment Advisors	San Mateo, Calif.	1,317.80	21.93	1.91	15.03	5.99
83	The MDE Group	Morristown, N.J.	1,301.08	0.96	6.92	-0.65	1.62
84	Wescott Financial Advisory Group	Philadelphia, Pa.	1,278.70	-2.39	4.05	-5.17	2.93
85	RCL Advisors	New York, N.Y.	1,245.63	41.57	10.21	23.00	15.09
86	Global Financial Private Capital	Sarasota, Fla.	1,241.96	13.76	0.11	-57.66	168.69
87	Paragon Investment Management	Seattle, Wash.	1,241.02	0.96	4.42	-0.48	1.44
88	SignatureFD	Atlanta, Ga.	1,224.39	4.20	2.86	-7.97	13.23
89	Gerstein Fisher	New York, N.Y.	1,197.27	15.79	1.48	16.51	-0.61
90	Highline Wealth Management	Rockville, Md.	1,190.22	6.92	7.04	-3.20	10.46
91	Carroll Financial Associates	Charlotte, N.C.	1,181.28	8.89	0.59	-6.14	16.01
92	Greenwich Wealth Management	Greenwich, Conn.	1,176.78	3.77	16.12	-13.29	19.67
93	Wurts & Associates	Seattle, Wash.	1,167.64	71.03	9.49	72.42	-0.81
94	Parsec Financial Management	Asheville, N.C.	1,164.04	2.26	1.03	-0.74	3.02
95	North American Management	Boston, Mass.	1,141.74	-1.23	3.31	0.20	-1.43

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96	RiverPoint Capital Management	Cincinnati, Ohio	1,141.67	6.60	3.34	-0.88	7.55
97	Grimes & Company	Westborough, Mass.	1,139.35	10.79	0.89	5.86	4.66
98	Wellesley Investment Advisors	Wellesley, Mass.	1,138.19	58.58	1.56	-0.59	59.52
99	Foster Group	West Des Moines, Iowa	1,124.00	3.24	1.37	1.86	1.35
100	Hartland & Co.	Cleveland, Ohio	1,114.18	213.33	3.87	33.82	134.15
101	Honkamp Krueger Financial Services	Dubuque, Iowa	1,110.67	9.99	0.56	5.81	3.95
102	EP Wealth Advisors	Torrance, Calif.	1,075.70	15.67	0.77	-9.12	27.27
103	Osborne Partners Capital Management	San Francisco, Calif.	1,072.13	5.20	2.63	-9.53	16.29
104	CM Wealth Advisors	Pepper Pike, Ohio	1,071.00	14.42	13.39	0.12	14.29
105	Covenant Multi-Family Offices	San Antonio, Texas	1,055.00	11.05	7.81	2.83	8.00
106	Palisades Hudson Asset Management	Scarsdale, N.Y.	1,052.31	-0.04	12.24	-1.21	1.18
107	Morton Capital Management	Calabasas, Calif.	1,051.50	-1.25	1.50	-6.34	5.43
108	Mainstay Capital Management	Grand Blanc, Mich.	1,047.68	2.44	0.33	-6.07	9.06
109	McQueen, Ball & Associates	Bethlehem, Pa.	1,047.02	2.80	2.99	-3.96	7.03
110	Balentine	Atlanta, Ga.	1,047.00	32.79	7.37	-9.29	46.39
111	Mintz Levin Financial Advisors	Boston, Mass.	1,035.64	-0.42	2.77	-2.28	1.91
112	Radnor Financial Advisors	Wayne, Pa.	1,030.62	2.80	4.62	-4.58	7.73
113	Vantage Investment Partners	Merriam, Kan.	1,028.59	2.30	14.49	-2.03	4.41
114	Sage Financial Group	Conshohocken, Pa.	1,016.30	6.87	1.97	1.49	5.30
115	TrustCore	Brentwood, Tenn.	1,012.70	18.97	1.00	11.43	6.77
116	Truepoint	Cincinnati, Ohio	1,011.42	8.43	1.90	-4.39	13.40
117	TCI Wealth Advisors	Tucson, Ariz.	1,000.09	1.33	0.85	-10.31	12.98
118	Retirement & Benefit Partners	Slingerlands, N.Y.	1,000.00	90.48	4.00	52.38	25.00
<b>ASSET CATEGORY: \$500 MILLION TO &lt; \$1 BILLION</b>							
119	Whitnell & Co.	Oak Brook, Ill.	997.38	14.25	2.62	9.74	4.11
120	Modera Wealth Management	Westwood, N.J.	982.24	1.84	1.65	-12.49	16.37
121	Brouwer & Janachowski	Tiburon, Calif.	979.93	0.72	2.10	-5.33	6.39
122	Filament	Seattle, Wash.	978.00	3.95	23.29	-5.95	10.53
123	Banyan Partners	Palm Beach Gardens, Fla.	971.03	122.76	0.76	-51.27	357.14
124	Hanson McClain Advisors	Sacramento, Calif.	960.66	69.01	0.43	44.97	16.58
125	Bridgewater Advisors	New York, N.Y.	944.22	4.93	3.02	-0.44	5.39
126	Lee Financial Corporation	Dallas, Texas	897.15	-9.06	2.89	-10.53	1.64
127	Pinnacle Advisory Group	Columbia, Md.	893.00	11.68	1.26	2.71	8.73
128	TFO-TDC	Maumee, Ohio	891.27	-3.28	1.05	-26.52	31.62
129	First Capital Consulting	Great Neck, N.Y.	871.05	8.61	2.03	1.03	7.50
130	Resource Consulting Group	Orlando, Fla.	869.89	-2.50	2.69	-7.33	5.21
131	Carlson Capital Management	Northfield, Minn.	836.30	-0.08	1.53	-4.09	4.19
132	Stevens Foster Financial Advisors	Bloomington, Mo.	835.00	10.60	1.92	6.78	3.57
133	GV Financial Advisors	Atlanta, Ga.	825.63	12.00	2.06	12.00	0.00
134	Legacy Wealth Management	Memphis, Tenn.	815.82	4.19	1.22	-5.74	10.54
135	Spire Investment Partners	McLean, Va.	814.67	20.10	0.41	20.10	0.00
136	West Financial Services	McLean, Va.	806.62	4.32	1.47	-1.94	6.38
137	Cassaday & Company	McLean, Va.	806.20	2.26	0.89	-4.08	6.60
138	JFS Wealth Advisors	Hermitage, Pa.	792.56	-2.91	0.94	-7.51	4.97
139	The Harbor Group	Bedford, N.H.	791.31	14.89	1.39	6.44	7.94
140	Stonebridge Capital Advisors	St. Paul, Minn.	790.99	8.06	1.00	-7.75	17.13
141	Brightworth	Atlanta, Ga.	788.05	-1.93	2.07	-6.58	4.97
142	Guyasuta Investment Advisors	Pittsburgh, Pa.	785.89	5.23	3.27	-4.42	10.09

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143	Crestwood Advisors	Boston, Mass.	764.00	25.87	3.06	13.28	11.11
144	Hamilton Capital Management	Columbus, Ohio	757.15	6.84	0.78	-24.25	41.04
145	Evensky & Katz	Coral Gables, Fla.	756.80	14.90	2.49	2.05	12.59
146	Strategic Wealth Partners	Deerfield, Ill.	750.92	2.49	2.41	-0.14	2.63
147	Altvest Personal Wealth Management	New York, N.Y.	748.00	9.04	1.60	2.73	6.14
148	Minneapolis Portfolio Management Group	Minneapolis, Minn.	739.81	7.10	0.26	4.15	2.83
149	LLBH Private Wealth Management	Westport, Conn.	732.88	7.83	4.12	8.44	-0.56
150	Quest Capital Management	Dallas, Texas	727.89	0.26	0.96	20.99	-17.14
151	Sargent Bickham Lagudis	Boulder, Colo.	717.00	-2.03	2.15	-12.04	11.37
152	AEPG Wealth Strategies	Warren, N.J.	710.70	3.22	1.81	1.65	1.55
153	ProVise Management Group	Clearwater, Fla.	705.00	-1.09	1.16	-8.92	8.59
154	The Golub Group	San Mateo, Calif.	704.66	3.82	0.96	-5.05	9.35
155	Fairway Wealth Management	Independence, Ohio	701.50	12.29	6.68	5.88	6.06
156	WESCAP Group	Burbank, Calif.	699.15	0.41	1.76	-8.42	9.64
157	Creative Financial Group	Atlanta, Ga.	689.43	5.41	1.21	-3.83	9.62
158	BSW Wealth Partners	Boulder, Colo.	688.00	8.35	3.28	3.19	5.00
159	Foster & Motley	Cincinnati, Ohio	684.50	N/A	1.85	N/A	6.32
160	CFS Investment Advisory Services	Totowa, N.J.	681.00	2.86	1.78	-5.22	8.52
161	Private Ocean	San Rafael, Calif.	669.79	-7.85	1.42	-15.46	9.01
162	Albion Financial Group	Salt Lake City, Utah	658.57	-2.23	2.20	-8.75	7.14
163	WESPAC Advisors	Oakland, Calif.	657.15	4.71	0.69	11.65	-6.21
164	Windham Brannon Financial Group	Atlanta, Ga.	650.60	56.35	2.17	-14.53	82.93
165	Exencial Wealth Advisors	Oklahoma City, Okla.	647.80	138.02	0.53	-2.85	145.00
166	Penniall & Associates	Pasadena, Calif.	641.57	134.15	0.43	63.57	43.15
167	Schneider Downs Wealth Management Advisors	Pittsburgh, Pa.	626.47	5.41	1.84	-17.84	28.30
168	Heritage Financial Services	Norwood, Mass.	624.63	1.57	0.96	-0.63	2.20
169	Kovack Advisors	Fort Lauderdale, Fla.	614.50	24.17	0.21	-14.01	44.41
170	Paragon Capital Management	Denver, Colo.	605.01	0.78	4.35	-2.12	2.96
171	Mission Wealth Management	Santa Barbara, Calif.	602.77	15.42	1.42	11.87	3.17
172	Diesslin & Associates	Fort Worth, Texas	602.72	6.51	1.94	-0.02	6.53
173	Financial Advisory Service	Leawood, Kan.	599.35	8.64	0.78	8.22	0.39
174	Braver Wealth Management	Needham, Mass.	590.74	36.63	1.50	12.76	21.17
175	Sequoia Financial Advisors	Akron, Ohio	590.13	19.28	0.47	-15.11	40.52
176	Summit Financial Strategies	Columbus, Ohio	588.73	4.08	1.17	-0.05	4.13
177	RTD Financial Advisors	Philadelphia, Pa.	588.18	35.21	1.46	27.18	6.32
178	Northwest Financial Group	Herndon, Va.	587.69	8.84	0.14	-21.56	38.77
179	Sadoff Investment Management	Milwaukee, Wis.	587.00	6.79	1.08	2.46	4.22
180	Oakwood Capital Management	Los Angeles, Calif.	582.50	8.40	1.69	7.46	0.88
181	Lenox Wealth Management	Cincinnati, Ohio	580.30	6.28	2.36	4.55	1.65
182	Founders Financial Network	Cupertino, Calif.	574.76	2.63	5.53	-23.03	33.33
183	Meyer Capital Group	Marlton, N.J.	561.74	-3.18	0.83	0.70	-3.86
184	Financial Services Advisory	Rockville, Md.	556.00	0.36	0.63	-3.06	3.53
185	Elliott Davis Investment Advisors	Greenville, S.C.	555.00	††	1.11	††	††
186	Emerson Investment Management	Boston, Mass.	553.21	6.93	1.36	-5.18	12.78
187	Camden Capital Management	El Segundo, Calif.	551.53	2.35	9.85	-12.27	16.67
188	Pettinga Financial Advisors	Evansville, Ind.	550.47	-4.20	1.17	-5.01	0.86
189	Edge Wealth Management	New York, N.Y.	550.00	8.91	2.29	-4.25	13.74
190	PDS Planning	Columbus, Ohio	548.08	9.86	1.44	5.24	4.40

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191	Argent Wealth Management	Weston, Mass.	546.81	21.49	5.06	3.49	17.39
192	Towneley Capital Management	Laguna Hills, Calif.	541.00	5.98	3.86	5.23	0.72
193	R. E. Wacker Associates	San Luis Obispo, Calif.	538.12	9.67	1.07	-0.83	10.60
194	Greenspring Wealth Management	Towson, Md.	534.85	246.96	3.45	336.50	-20.51
195	Kistler-Tiffany Advisors	Berwyn, Pa.	522.69	6.82	1.46	-2.46	9.51
196	Sapient Private Wealth Management	Eugene, Ore.	521.17	15.82	1.54	3.48	11.92
197	MJ Smith & Associates	Greenwood Village, Colo.	520.10	-4.02	1.16	-4.02	0.00
198	Sharkey, Howes & Javer	Denver, Colo.	518.17	3.90	0.45	-0.67	4.59
199	McKinley Carter Wealth Services	Wheeling, W.Va.	516.56	1.12	0.77	-1.90	3.08
200	Spero-Smith Investment Advisers	Beachwood, Ohio	515.21	26.85	1.91	23.09	3.05
201	Lau Associates	Greenville, Del.	509.73	7.62	3.69	-0.18	7.81
202	Dion Money Management	Williamstown, Mass.	508.27	-5.35	0.36	-5.35	0.00
203	National Asset Management	Seattle, Wash.	502.98	-17.00	0.17	3.61	-19.90
<b>ASSET CATEGORY: \$300 MILLION TO \$500 MILLION</b>							
204	Sigma Investment Counselors	Southfield, Mich.	487.00	1.67	1.13	-0.92	2.62
205	Briaud Financial Advisors	College Station, Texas	484.63	6.66	1.92	4.97	1.61
206	FMA Advisory	Harrisburg, Pa.	479.69	7.45	0.74	7.45	0.00
207	Greene Wealth Management	Seattle, Wash.	477.33	0.99	1.74	-4.51	5.77
208	CPS Investment Advisors	Lakeland, Fla.	477.00	17.78	0.40	-11.67	33.33
209	Kinsight	Birmingham, Ala.	469.79	-14.97	2.58	-6.56	-9.00
210	The Monitor Group	McLean, Va.	467.87	-0.52	1.79	-20.34	24.88
211	HoyleCohen	San Diego, Calif.	466.63	8.68	1.05	7.21	1.37
212	RR Advisory Group	New York, N.Y.	464.68	20.99	2.90	5.87	14.29
213	Austin Asset Management Company	Austin, Texas	463.24	15.49	1.52	13.21	2.01
214	Center for Financial Planning	Southfield, Mich.	461.58	19.56	0.63	5.31	13.53
215	LaSalle St. Investment Advisors	Elmhurst, Ill.	459.54	10.73	0.42	-4.37	15.79
216	Pinnacle Wealth Planning Services	Mansfield, Ohio	450.81	-0.26	0.95	-7.40	7.71
217	CooksonPeirce Investment Management	Pittsburgh, Pa.	449.66	0.60	1.68	-5.03	5.93
218	Warwick Partners	Bryan, Texas	446.50	19.39	3.14	13.50	5.19
219	Mosaic Financial Partners	San Francisco, Calif.	437.82	8.05	1.86	-1.60	9.81
220	SFMG Wealth Advisors	Plano, Texas	436.48	4.98	1.21	1.48	3.45
221	Gordon Asset Management	Durham, N.C.	430.93	11.89	1.06	6.37	5.19
222	Integrated Wealth Management	Palm Springs, Calif.	421.42	14.14	0.93	7.08	6.59
223	Patton Albertson & Miller	Macon, Ga.	420.16	-4.72	1.50	-9.13	4.85
224	Hudock Moyer Wealth Resources	Williamsport, Pa.	418.50	†	0.70	†	†
225	Glassman Wealth Services	McLean, Va.	415.44	14.70	2.60	7.53	6.67
226	GM Advisory Group	Melville, N.Y.	413.63	6.69	1.57	0.63	6.02
227	Versant Capital Management	Phoenix, Ariz.	412.80	21.9e1	5.73	8.36	12.50
228	Stepp & Rothwell	Overland Park, Kan.	411.41	-3.92	2.35	-5.56	1.74
229	Wealthquest Corporation	Cincinnati, Ohio	401.19	24.19	0.58	43.74	-13.60
230	Beaird Harris Wealth Management	Dallas, Texas	397.62	3.64	1.88	-1.27	4.98
231	Horan Capital Management	Hunt Valley, Md.	396.49	15.95	0.58	21.34	-4.44
232	Satovsky Asset Management	New York, N.Y.	395.42	4.05	1.88	-0.90	5.00
233	Kings Point Capital Management	Brentwood, Tenn.	392.29	6.71	4.13	-10.14	18.75
234	Medley & Brown	Jackson, Miss.	383.80	0.90	0.82	-0.60	1.51
235	Petersen Hastings Investment Management	Kennewick, Wash.	379.16	-1.29	1.11	-3.89	2.71
236	ACG Advisory Services	Midlothian, Va.	378.00	4.71	1.58	-0.96	5.73
237	Clear Harbor Asset Management	New York, N.Y.	377.44	-0.33	1.11	-8.56	9.00

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(By Total Assets)

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238	Heller Capital Resources	Los Angeles, Calif.	376.46	19.85	1.37	4.60	14.58
239	Windsor Capital Management	Phoenix, Ariz.	375.53	9.53	0.61	-12.41	25.05
240	Annex Wealth Management	Elm Grove, Wis.	374.59	44.77	0.36	9.76	31.90
241	Burt Wealth Advisors	Rockville, Md.	373.84	7.52	1.71	0.64	6.83
242	Valley National Advisers	Bethlehem, Pa.	371.70	17.46	0.41	-8.64	28.57
243	Security Ballew Wealth Management	Jackson, Miss.	367.69	-5.15	1.84	-5.15	0.00
244	JWA Financial Group	Dallas, Texas	365.00	1.11	1.36	0.73	0.37
245	Brookstone Capital Management	Wheaton, Ill.	364.00	21.33	0.07	2.70	18.14
246	Smith & Howard Wealth Management	Atlanta, Ga.	363.32	4.77	2.18	1.63	3.09
247	New England Investment & Retirement Group	North Andover, Mass.	362.30	3.51	0.52	10.91	-6.67
248	Lassus Wherley	New Providence, N.J.	359.32	8.59	1.18	-4.58	13.81
249	Rodgers & Associates	Lancaster, Pa.	354.08	4.02	0.90	10.10	-5.53
250	Weatherly Asset Management	Del Mar, Calif.	351.52	5.35	1.50	3.55	1.74
251	ML&R Wealth Management	Austin, Texas	350.46	-9.50	1.79	-14.12	5.38
252	Girard Partners	King of Prussia, Pa.	350.00	36.71	0.70	16.21	17.65
253	ARGI Investment Services	Louisville, Ky.	348.18	67.64	0.24	37.51	21.92
254	REDW Stanley Financial Advisors	Albuquerque, N.M.	346.83	-2.24	1.20	-8.67	7.04
255	Delessert Financial Services	Waltham, Mass.	339.83	-4.32	2.52	-7.16	3.05
256	Yeske Buie	Vienna, Va.	338.00	3.68	1.58	-4.07	8.08
257	Smith Anglin Financial	Dallas, Texas	330.11	0.09	0.73	-9.21	10.24
258	Confluence Wealth Management	Portland, Ore.	326.77	8.63	0.95	-2.39	11.29
259	Sheaff Brock Investment Advisors	Indianapolis, Ind.	324.00	15.71	0.41	-16.41	38.43
260	Zevin Asset Management	Boston, Mass.	321.42	16.35	1.40	1.17	15.00
261	Ruggie Wealth Management	Tavares, Fla.	318.64	12.99	0.61	-15.74	34.11
262	The Retirement Planning Group	Overland Park, Kan.	314.00	9.79	0.52	0.28	9.49
263	Krasney Financial	Mendham, N.J.	313.30	9.25	0.99	-7.30	17.84
264	Fox, Joss & Yankee	Reston, Va.	312.53	1.64	1.32	-1.37	3.06
265	Madison Wealth Management	Cincinnati, Ohio	310.00	10.52	1.87	-2.13	12.93
266	Old Stone Private Wealth	Washington, D.C.	305.70	144.56	1.13	26.81	92.86
267	Greystone Financial Group	Troy, Mich.	302.00	5.96	0.67	-17.58	28.57
268	Schiavi + Dattani	Wilmington, Del.	301.20	17.01	1.99	4.61	11.85
269	Tortoise Investment Management	White Plains, N.Y.	301.13	11.03	1.48	2.28	8.56
<b>ASSET CATEGORY: \$100 MILLION TO \$300 MILLION</b>							
270	French Wolf & Farr	Atlanta, Ga.	299.97	17.06	3.12	-1.23	18.52
271	Doyle Wealth Management	St. Petersburg, Fla.	298.95	23.46	0.77	5.23	17.33
272	Lodestar Private Asset Management	Alamo, Calif.	296.44	-14.55	1.67	-17.43	3.49
273	Callan Capital	La Jolla, Calif.	292.29	-9.75	3.48	-17.27	9.09
274	Advisor Financial Services	Woodstock, Ga.	283.24	6.35	0.35	43.72	-26.00
275	Johnson Bender & Company	Houston, Texas	279.60	3.98	1.36	-1.57	5.64
276	Jaffe Tilchin Wealth Management	Tampa, Fla.	279.00	17.72	0.83	8.94	8.06
277	Hardy Reed	Tupelo, Miss.	274.52	51.50	1.82	41.47	7.09
278	Capelli Financial Services	Bloomfield Hills, Mich.	269.00	1.36	1.23	-1.88	3.30
279	Financial Advantage	Columbia, Md.	268.00	-1.83	1.37	-11.90	11.43
280	Wade Financial Group	Minneapolis, Minn.	258.32	-10.75	1.59	2.47	-12.90
281	Asset Strategies	Casper, Wyo.	258.13	21.48	1.01	13.38	7.14
282	Glass Jacobson Investment Advisors	Owings Mills, Md.	258.07	19.88	0.97	2.82	16.59
283	Traphagen Investment Advisors	Oradell, N.J.	257.78	5.33	0.30	1.78	3.49
284	Rinehart Wealth Management	Charlotte, N.C.	255.00	16.97	0.89	10.82	5.56

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(By Total Assets)

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285	Inverness Investment Group	Beachwood, Ohio	253.14	20.87	1.18	-12.86	38.71
286	Wiley Group	West Conshohocken, Pa.	252.00	17.21	0.55	-1.06	18.46
287	Grant/GrossMendelsohn	Baltimore, Md.	249.53	32.73	1.56	20.28	10.34
288	HFI Wealth Management	Shepherdstown, W. Va.	249.50	23.56	1.07	45.30	-14.96
289	SilverOak Wealth Management	Edina, Minn.	249.10	5.33	1.58	-8.00	14.49
290	The Advocate Group	Minnetonka, Minn.	246.98	†	1.34	†	
291	North Berkeley Investment Partners	Berkeley, Calif.	246.74	3.74	1.13	0.41	3.32
292	Integer Wealth Advisors Group	Kennesaw, Ga.	246.30	3.87	3.79	-0.93	4.84
293	Richard P. Slaughter Associates	Austin, Texas	245.42	21.76	0.70	13.06	7.69
294	CRA Financial	Northfield, N.J.	244.62	4.96	0.77	-3.67	8.97
295	Mark J. Snyder Financial Services	Medford, N.Y.	242.51	2.04	0.51	-2.94	5.13
296	Heritage Wealth Advisors	Richmond, Va.	242.36	7.24	2.13	-4.05	11.76
297	KHC Wealth Management	Overland Park, Kan.	242.00	12.56	1.20	5.84	6.35
298	Cornerstone Advisory	Baltimore, Md.	238.72	27.84	0.95	7.38	19.05
299	Abridge Partners	Madison, Miss.	234.10	-10.69	0.93	-36.46	40.56
300	ARS Wealth Advisors	St. Petersburg, Fla.	233.47	16.45	0.86	5.23	10.66
301	Stonegate Wealth Management	Fair Lawn, N.J.	233.00	9.91	0.93	3.31	6.38
302	Raffa Wealth Management	Washington, D.C.	231.40	4.94	3.56	-16.05	25.00
303	Harris Financial Advisors	Torrance, Calif.	231.21	3.22	0.91	-1.68	4.98
304	The L. Warner Companies	Timonium, Md.	230.58	-1.06	1.08	-5.68	4.90
305	Sunrise Advisors	Leawood, Kan.	229.31	10.25	0.81	2.04	8.05
306	LBA Wealth Management	Jacksonville, Fla.	228.72	-2.36	1.14	-10.17	8.70
307	TGS Financial Advisors	Radnor, Pa.	228.42	-3.01	0.80	-6.76	4.01
308	Sather Financial Group	Victoria, Texas	227.80	5.08	1.01	-0.50	5.61
309	Financial Planning and Information Services	De Pere, Wis.	227.00	1.79	0.36	-6.11	8.42
310	Ferrell Wealth Management	Winter Park, Fla.	226.39	7.80	1.27	2.96	4.71
311	Absolute Capital Management	Pittsburgh, Pa.	226.00	20.86	0.13	0.71	20.00
312	Starfire Investment Advisers	Southfield, Mich.	225.64	1.47	0.84	-0.41	1.89
313	Roof Advisory Group	Harrisburg, Pa.	225.62	22.02	1.61	7.20	13.82
314	Herbein Wealth Management	Wyomissing, Pa.	225.15	0.54	0.90	1.74	-1.18
315	Gateway Advisory	Westfield, N.J.	224.20	-9.12	0.69	-16.62	9.00
316	Camarda Wealth Advisory Group/Camarda Consultants	Fleming Island, Fla.	222.11	24.28	0.14	1.25	22.75
317	Sycamore Financial Group	Kokomo, Ind.	221.48	3.17	0.18	-1.13	4.35
318	RB Capital Management	Incline Village, Nev.	219.06	6.94	0.54	-7.29	15.34
319	Redwood Wealth Management	Alpharetta, Ga.	218.94	16.81	0.47	5.25	10.98
320	WNY Asset Management	Williamsville, N.Y.	218.69	87.75	0.20	-36.68	196.50
321	Moisand Fitzgerald Tamayo	Maitland, Fla.	218.38	6.48	0.73	1.88	4.51
322	Householder Group Financial Advisors	Scottsdale, Calif.	218.21	-78.00	0.16	-78.00	0.00
323	WNA Wealth Advisors	Hinsdale, Ill.	213.07	6.69	0.78	-3.08	10.08
324	Affinity Wealth Management	Wilmington, Del.	212.97	7.02	0.61	-8.27	16.67
325	DCA Global Wealth Management	Norcross, Ga.	212.56	-0.86	1.83	-3.42	2.65
326	Droms Strauss Advisors	St. Louis, Mo.	212.00	-2.75	1.41	-2.75	0.00
327	William Mack & Associates	Troy, Mich.	211.00	2.93	0.27	-54.84	127.89
328	The Planning Center	Moline, Ill.	210.00	0.00	0.42	-10.00	11.11
329	Gardey Financial Advisors	Saginaw, Mich.	209.00	-2.34	1.16	-7.76	5.88
330	Bridgewater Wealth & Financial Management	Bethesda, Md.	206.02	6.05	1.72	-1.90	8.11
331	Harvest Capital Management	Concord, N.H.	204.01	5.42	0.85	-0.73	6.19
332	R. W. Rogé & Company	Bohemia, N.Y.	204.00	-3.77	0.79	-3.40	-0.39

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333	Branson, Fowlkes & Company	Houston, Texas	204.00	0.49	1.36	-6.21	7.14
334	Classic Capital	Short Hills, N.J.	203.70	6.56	1.92	2.54	3.92
335	Cahill Financial Advisors	Edina, Minn.	203.57	37.34	0.65	24.70	10.14
336	Boston Research and Management	Manchester, Mass.	199.61	2.04	1.74	-2.40	4.55
337	21st Century Wealth Management	York, Pa.	199.50	58.23	3.63	55.35	1.85
338	JSF Financial	Los Angeles, Calif.	198.50	20.30	0.66	10.28	9.09
339	Ritter Daniher Financial Advisory	Cincinnati, Ohio	197.68	-2.06	0.92	2.47	-4.42
340	Enviso Capital	San Diego, Calif.	195.00	-2.50	0.66	-5.81	3.51
341	Bedrock Capital Management	Los Altos, Calif.	194.81	14.19	1.60	10.45	3.39
342	Edge Portfolio Management	Winfield, Ill.	193.98	19.73	3.18	17.77	1.67
343	Sanders Financial Management	Norcross, Ga.	192.65	6.59	0.88	-1.72	8.46
344	Goodman Financial Corporation	Houston, Texas	192.29	12.42	1.05	8.73	3.39
345	Horizon Advisors	Houston, Texas	192.00	21.77	1.57	1.81	19.61
346	Asset Management Group	Stamford, Conn.	191.00	8.73	0.68	8.34	0.36
347	Financial Management Group	Cincinnati, Ohio	189.21	-0.75	0.77	-10.83	11.31
348	R.S. Crum	Newport Beach, Calif.	189.11	-4.54	1.80	-4.54	0.00
349	WheelerFrost Associates	San Diego, Calif.	188.35	27.38	0.87	-11.95	44.67
350	Burton Enright Welch	Walnut Creek, Calif.	188.35	13.91	0.84	11.38	2.27
351	Hopwood Financial Services	Great Falls, Va.	187.48	3.74	1.29	-5.56	9.85
352	Porter White Investment Advisors	Birmingham, Ala.	187.10	11.55	2.64	2.13	9.23
353	Rappaport Reiches Capital Management	Skokie, Ill.	187.01	-3.87	1.29	-19.78	19.83
354	Wechter Feldman Wealth Management	Parsippany, N.J.	186.82	0.54	1.28	1.23	-0.68
355	Stevens Wealth Management	Deerfield, Ill.	184.76	8.56	1.74	8.56	0.00
356	Vintage Financial Services	Ann Arbor, Mich.	183.22	1.69	0.68	-5.90	8.06
357	LVZ Advisors	Holland, Mich.	183.04	39.62	0.12	-18.09	70.45
358	Anthony Smith Advisors	Atlanta, Ga.	181.36	-6.41	1.52	-7.98	1.71
359	Winch Financial	Appleton, Wis.	180.69	10.18	0.33	-1.24	11.56
360	Cypress Point Wealth Management	Dallas, Texas	180.40	12.75	0.95	2.66	9.83
361	KAM Advisors	Beverly Hills, Calif.	180.24	1.83	1.49	-7.43	10.00
362	Signal Securities	Fort Worth, Texas	180.00	1.35	0.40	-9.91	12.50
363	Investor's Capital Management	Menlo Park, Calif.	179.21	7.22	0.97	6.64	0.54
364	Jentner Wealth Management	Akron, Ohio	177.53	-4.54	1.26	-6.57	2.17
365	Nova Wealth Management Group	Atlanta, Ga.	176.94	14.06	1.57	3.96	9.71
366	Portfolio	Albuquerque, N.M.	176.61	36.27	0.77	-34.26	107.27
367	A&F Financial Advisors	Charleston, W.Va.	176.51	5.22	1.08	-2.53	7.95
368	Asset Advisory Group	Kinnelon, N.J.	175.72	22.95	1.60	6.18	15.79
369	Corbin & Company	Fort Worth, Texas	175.00	235.28	6.73	248.17	-3.70
370	EHD Advisory Services	Lancaster, Pa.	174.47	-4.23	0.51	-1.42	-2.85
371	Asset Management Advisors	Houston, Texas	170.45	-1.48	2.89	8.54	-9.23
372	Matrix Wealth Advisors	Charlotte, N.C.	169.17	-1.56	1.06	3.39	-4.79
373	Mutual Fund Management	Troy, Mich.	168.82	16.48	0.57	-0.77	17.39
374	Kraft Asset Management	Nashville, Tenn.	165.50	47.98	1.56	45.19	1.92
375	Delphi Private Advisors	San Diego, Calif.	163.54	25.41	2.37	-23.66	64.29
376	American Wealth Management	Reno, Nev.	162.38	7.44	0.21	-18.19	31.33
377	Mark Sheptoff Financial Planning	Glastonbury, Conn.	162.00	0.00	1.15	2.84	-2.76
378	Latitude Advisors	Vero Beach, Fla.	161.62	216.89	0.15	65.99	90.91
379	Guidant Wealth Advisors	Palatine, Ill.	161.00	3.35	0.56	1.54	1.79
380	Investmark	Stratford, Conn.	161.00	483.48	0.49	463.91	3.47

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381	TABR Capital Management	Orange, Calif.	159.91	-5.60	0.61	-5.96	0.38
382	KMH Wealth Management	Victoria, Texas	159.50	10.38	0.81	-1.95	12.57
383	Bernhardt Wealth Management	McLean, Va.	159.31	1.41	1.36	-7.26	9.35
384	Trinity Financial Advisors	Chicago, Ill.	158.72	4.03	2.78	4.03	0.00
385	Smedley Financial Services	Salt Lake City, Utah	157.76	-4.90	0.19	3.27	-7.90
386	Securus Wealth Management	Plymouth, Minn.	157.57	16.36	0.64	9.24	6.52
387	EisnerAmper Wealth Mgmt. & Corporate Benefits	Bridgewater, N.J.	156.00	0.65	0.35	-6.22	7.32
388	Guild Investment Management	Los Angeles, Calif.	154.80	11.85	1.21	-6.50	19.63
389	Financial Focus	Livingston, N.J.	154.73	5.63	0.62	-7.04	13.64
390	Ramsey & Associates	Seattle, Wash.	154.21	-2.00	1.79	-2.00	0.00
391	Witt Mares Financial Vision	Williamsburg, Va.	152.03	0.72	0.65	7.18	-6.02
392	Burns Matteson Capital Management	Corning, N.Y.	151.94	7.28	0.93	-3.19	10.81
393	Certified Planners	san ramon, Calif.	151.74	-6.01	0.51	-6.01	0.00
394	Gierl Augustine Investment Management	Sarver, Pa.	151.48	8.87	0.38	5.59	3.11
395	Geier Asset Management	Marriottsville, Md.	151.18	1.80	0.89	14.37	-10.99
396	Baron Financial Group	Fair Lawn, N.J.	145.20	34.44	0.76	8.26	24.18
397	Acorn Financial Advisory Services	Fairfax, Va.	144.40	12.81	0.31	-15.88	34.11
398	Carolina Capital Consulting	Charlotte, N.C.	142.18	16.81	1.90	-8.11	27.12
399	Verus Investment Advisory Group	Appleton, Wis.	141.89	5.31	0.36	1.55	3.70
400	Grand Wealth Management	Grand Rapids, Mich.	141.14	-1.26	0.93	-13.60	14.29
401	Kahler Financial Group	Rapid City, S.D.	141.06	-7.50	1.58	-23.09	20.27
402	WJ Interests	Sugar Land, Texas	140.70	-5.57	0.96	-4.93	-0.68
403	Law & Associates	Glen Echo, Md.	140.52	4.65	0.84	2.78	1.82
404	Crescent Sterling	Metairie, La.	140.22	20.87	1.08	19.01	1.56
405	Allodium Investment Consultants	Minneapolis, Minn.	140.10	-4.72	1.57	-18.64	17.11
406	Piedmont Investment Advisors	Lansdowne, Va.	139.83	3.06	0.41	-20.21	29.17
407	The Lubitz Financial Group	Miami, Fla.	139.43	-1.46	1.37	-5.32	4.08
408	Align Wealth Management	Oklahoma City, Okla.	137.75	24.10	1.20	5.75	17.35
409	Blue Ocean Strategic Capital	Syracuse, N.Y.	137.71	14.80	0.55	12.07	2.44
410	Court Place Advisors	Ellicott City, Md.	136.70	2.11	0.61	-1.98	4.17
411	PBGH Financial Advisors	Fredericksburg, Va.	135.00	45.16	0.57	23.54	17.50
412	Personal Financial Group	Overland Park, Kan.	133.42	150.84	0.53	100.67	25.00
413	Investment Advisory Professionals	Boca Raton, Fla.	133.00	-2.92	1.36	-1.93	-1.01
414	Miller Advisors	Kirkland, Wash.	132.23	-1.78	0.67	0.71	-2.48
415	Sentinel Wealth Management	Reston, Va.	132.21	6.01	1.63	0.77	5.19
416	Financial Connections Group	Corte Madera, Calif.	131.72	3.31	0.70	-13.73	19.75
417	Wealth Care	Merritt Island, Fla.	130.00	18.18	1.59	13.86	3.80
418	Apex Financial Advisors	Yardley, Pa.	130.00	†	2.00	†	
419	Sanchez Wealth Management	Reno, Nev.	129.13	188.41	0.22	148.86	15.89
420	Netting & Pace, CPAs	San Antonio, Texas	128.08	-1.69	2.37	-3.51	1.89
421	Clear Point Advisors	Jericho, N.Y.	128.00	0.00	1.02	0.00	0.00
422	The Darrow Company	Concord, Mass.	124.36	-0.63	1.28	8.59	-8.49
423	Integriss Wealth Management	Carmel, Calif.	124.00	-3.13	2.38	15.50	-16.13
424	Glenn Woody Financial Consultants	Costa Mesa, Calif.	123.62	-13.41	0.67	18.58	-26.98
425	The Advisory Group	Diamond Bar, Calif.	123.51	1.07	0.28	33.77	-24.45
426	McCarthy Asset Management	Redwood Shores, Calif.	120.58	2.56	0.62	1.51	1.03
427	Asset Planning Corporation	Knoxville, Tenn.	120.15	-3.13	0.90	-6.74	3.88
428	Searcy Financial Services	Overland Park, Kan.	118.86	-16.18	0.91	-14.26	-2.24

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# FA'S 2012 RIA RANKING

(By Total Assets)

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2011 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2011 ASSETS (\$MM)	% GROWTH IN ASSETS 2010-2011	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
429	Carolina Wealth Management	Greenville, N.C.	118.63	9.42	0.46	13.62%	-3.70
430	Financial Symmetry	Raleigh, N.C.	118.00	5.36%	0.53	-4.13	9.90
431	Joseph Capital Management	Hernando, Fla.	117.99	-26.86	0.95	12.65	-35.08
432	Beverly Investment Advisors	Beverly Hills, Calif.	116.68	-0.47	0.82	0.23	-0.70
433	YellowWood Financial Advisors	Gaithersburg, Md.	115.57	6.74	1.36	4.23	2.41
434	Caton Financial	San Rafael, Calif.	114.94	9.71	0.75	8.28	1.32
435	Helm Investment Management	Denver, Colo.	114.73	26.03	1.71	10.98	13.56
436	Meritas Wealth Management	Larkspur, Calif.	114.23	3.69	0.55	-4.74	8.85
437	Heritage Way Advisors	Rockford, Ill.	114.21	1.51	1.76	-10.98	14.04
438	Core Capital Solutions	Naperville, Ill.	113.29	-7.43	1.60	-8.73	1.43
439	Parrish & Co. Private Wealth Management	Chevy Chase, Md.	112.92	2.18	1.41	-0.37	2.56
440	Andrews, Lucia Wealth Management	San Mateo, Calif.	112.37	12.21	1.56	-3.38	16.13
441	MJB Asset Management	New York, N.Y.	111.86	9.19	1.12	0.45	8.70
442	Private Capital Management	Larkspur, Calif.	110.00	29.41	2.75	13.24	14.29
443	RPH Financial Services	Stroudsburg, Pa.	109.66	5.99	0.96	5.06	0.88
444	SRS Capital Advisors	Denver, Colo.	109.00	14.74	0.66	7.78	6.45
445	Asset Planning	Cypress, Calif.	107.78	19.63	0.58	8.64	10.12
446	Covenant Wealth Advisors	Williamsburg, Va.	107.74	4.09	1.01	-1.75	5.94
447	Tull Financial Group	Chesapeake, Va.	107.64	4.12	0.51	-33.07	55.56
448	Evergreen Advisors	Chattanooga, Tenn.	106.53	45.16	0.37	25.14	16.00
449	Focus Financial Advisors	Rockford, Ill.	106.28	-0.37	0.76	-2.52	2.21
450	Woloshin Investment Management	Medford, N.J.	106.00	23.26	0.42	3.53	19.05
451	Andrews Advisory Associates	Honolulu, Hawaii	106.00	-3.64	0.53	-3.64	0.00
452	Vermillion Financial Advisors	South Barrington, Ill.	105.96	1.22	0.76	7.73	-6.04
453	Family Wealth Advisory Group	Cincinnati, Ohio	105.73	22.23	0.81	19.41	2.36
454	Berno Financial Management	Cincinnati, Ohio	105.03	4.51	1.25	0.78	3.70
455	Fluent Wealth Partners	San Jose, Calif.	105.00	10.53	0.88	-7.89	20.00
456	BondStreet Wealth Management	Everett, Wash.	104.60	-22.58	0.24	-28.81	8.75
457	DuckworthMehner Private Wealth Advisors	Costa Mesa, Calif.	104.51	17.33	3.73	13.14	3.70
458	Reston Wealth Management	Reston, Va.	103.68	10.06	0.43	9.61	0.41
459	Cahaba Wealth Management	Atlanta, Ga.	102.77	27.34	0.76	17.91	8.00
460	Poehling Capital Management	Madison, Wis.	102.54	0.60	0.34	-3.72	4.48
461	Beacon Financial Advisors	Rye Brook, N.Y.	102.00	7.37	2.43	-0.30	7.69
462	Regency Wealth Management	Midland Park, N.J.	101.60	47.25	0.70	-16.29	75.90
463	Kelly Financial Group	Wethersfield, Conn.	101.45	0.80	0.16	-4.42	5.46
464	JVL Associates	Wyoming, Mich.	100.36	-1.61	4.18	-13.91	14.29
<b>ASSET CATEGORY: \$75 MILLION TO \$100 MILLION</b>							
465	Premier Estate Planners	Clinton Township, Mich.	98.51	10.95	0.24	7.47	3.24
466	Placer Summit Financial Group	Roseville, Calif.	97.46	31.74	0.73	6.17	24.07
467	Ramah Investment Group	Brookfield, Wis.	97.45	66.87	0.23	140.78	-30.69
468	Sard Wealth Management Group	Atlanta, Ga.	96.90	2.71	0.52	6.54	-3.59
469	Triton Wealth Management	Chester, Md.	96.74	38.81	0.44	26.19	10.00
470	Paragon Wealth Management	Provo, Utah	96.74	37.03	0.59	24.57	10.00
471	CLA Financial Advisors	Northbrook, Ill.	95.00	†	0.68	†	
472	Financial Management Concepts	Winter Springs, Fla.	94.36	-11.03	0.76	-8.16	-3.13
473	Resolute Financial	Newburyport Mass.	92.68	49.97	0.55	2.66	46.09
474	Ivy League Financial Advisors	Rockville, Md.	92.57	15.50	0.94	13.17	2.06
475	Woodward Financial Advisors	Chapel Hill, N.C.	91.83	23.07	1.15	4.61	17.65

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(By Total Assets)

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2011 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2011 ASSETS (\$MM)	% GROWTH IN ASSETS 2010-2011	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
476	American Financial & Tax Strategies	New York, N.Y.	91.57	8.28	0.66	-5.06	14.05
477	Hallett Advisors	Port Angeles, Wash.	91.50	37.60	0.37	34.24	2.50
478	Colman Knight Advisory Group	Carlisle, Mass.	91.30	4.58	1.40	1.36	3.17
479	Chesney & Company	Sheldon, S.C.	90.36	23.23	1.88	23.23	0.00
480	Spraker Wealth Management	Maitland, Fla.	90.34	25.82	1.24	20.65	4.29
481	Dorman Financial Management	Maitland, Fla.	88.38	2.52	0.27	-13.02	17.86
482	LJCooper Wealth Advisors	Orem, Utah	86.64	5.43	0.38	-8.26	14.93
483	Rainsberger Wealth Advisors	Colorado Springs, Colo.	85.00	22.96	0.94	16.13	5.88
484	Brown Financial Advisory	Fairhope, Ala.	82.97	†	0.56	†	
485	Flagship Capital Management	Media, Pa.	81.85	22.07	0.56	-13.89	41.75
486	CTB Financial Services	Minneapolis, Minn.	81.00	8.00	0.51	-15.92	28.46
487	Garnet Group	Bethesda, Md.	79.53	3.19	1.77	3.19	0.00
488	Welz Financial Services	Grass Valley, Calif.	78.33	-4.62	0.63	-4.62	0.00
489	Siligmuller & Norvid Wealth Advisors	Glen Ellyn, Ill.	75.76	-1.21	1.35	-6.50	5.66
<b>ASSET CATEGORY: \$50 MILLION TO \$75 MILLION</b>							
490	Charleston Financial Advisors	Charleston, S.C.	74.35	-0.03	0.71	4.73	-4.55
491	Financial Guidance Group	Palm Harbor, Fla.	72.44	9.37	0.63	9.37	0.00
492	Cypress Advisory Services	Houston, Texas	72.00	9.09	1.09	7.44	1.54
493	Synergy Financial Group of Arizona	Scottsdale, Ariz.	70.79	25.00	0.40	0.00	25.00
494	WHM Capital Advisors	Columbia, S.C.	70.78	21.22	1.11	-1.51	23.08
495	LeafHouse Financial Advisors	Austin, Texas	68.50	372.41	0.60	310.79	15.00
496	D. L. Blain & Co.	New Bern, N.C.	65.76	11.70	0.80	-1.92	13.89
497	Palisade Investments	Stateline, Nev.	62.00	24.00	1.03	7.47	15.38
498	Money Plans	Silver Spring, Md.	61.53	15.09	0.82	12.02	2.74
499	Powell Financial	Cornelius, N.C.	60.74	20.30	0.81	-3.76	25.00
500	North Capital	San Francisco, Calif.	57.83	13.17	1.13	-51.18	131.82
501	Summit Place Financial Advisors	Summit, N.J.	57.05	26.44	5.71	1.15	25.00
502	Cathy Pareto and Associates	Coral Gables, Fla.	56.00	26.78	0.70	1.42	25.00
503	Warren Financial Service	Exton, Pa.	55.75	4.25	0.29	-2.20	6.59
504	Collins Capital Management	Jacksonville, Fla.	52.65	26.70	0.32	-8.62	38.66
505	Northvest	Keene, N.H.	52.30	1.36	0.99	-2.47	3.92
506	Elderado Financial	Montrose, Colo.	52.00	8.33	0.27	8.33	0.00
<b>ASSET CATEGORY: &lt; \$50 MILLION</b>							
507	Sucr�-Vail Wealth Advisors	Houston, Texas	44.03	54.26	0.49	54.26	0.00
508	G. DeWayne McAnally	Oklahoma City, Okla.	43.05	43.51	0.19	15.82	23.91
509	DPL Retirement Advisors	Dover, N.H.	32.05	†	2.47	†	†
510	Safe Harbor Asset Management	Huntington, N.Y.	16.58	-4.48	0.72	-8.63	4.55
511	Birch Cove Group	Bloomington, Minn.	9.98	-10.78	0.06	-19.80	11.25
512	TSM Management Group	Gautier, Miss.	4.00	5.26	0.10	0.00	5.26
513	Holbrook Management	New York, N.Y.	2.43	79.13	1.21	-10.44	100.00

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