

FINANCIAL ADVISOR

FA

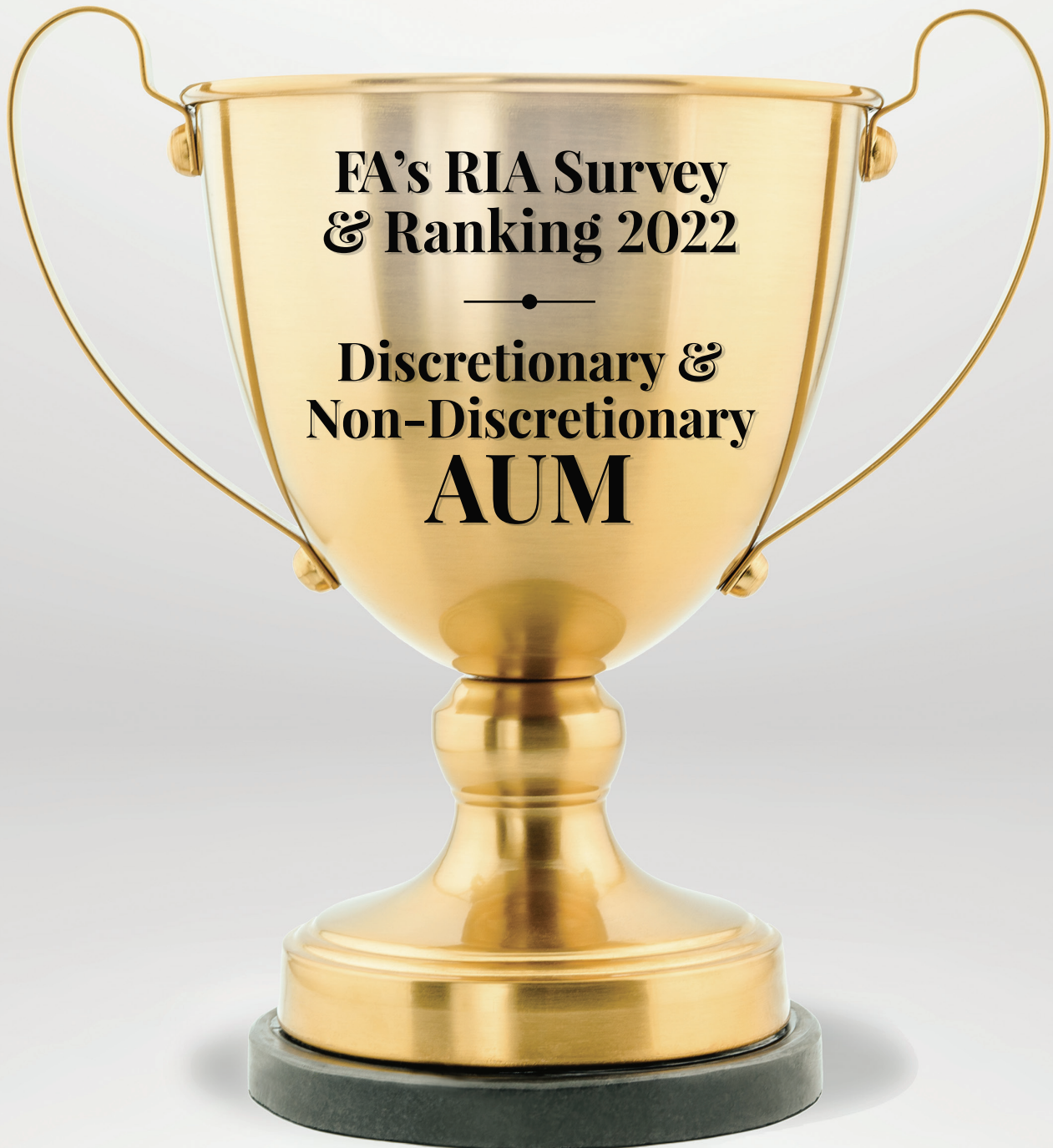
KNOWLEDGE FOR THE SOPHISTICATED ADVISOR

July/August 2022 • www.fa-mag.com

 Commonwealth



RAYMOND JAMES



**FA's RIA Survey
& Ranking 2022**

— • —
**Discretionary &
Non-Discretionary
AUM**

FA's 2022 RIA RANKING

Commonwealth



RAYMOND JAMES

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2021 (\$MM)	NON-DISCRETIONARY ASSETS 2021 (\$MM)	YEAR END 2021 ASSETS (\$MM)*
ASSET CATEGORY: \$1 BILLION AND OVER					
1	CAPTRUST	Raleigh, N.C.	75,176.97	579,877.32	655,054.29
2	Edelman Financial Engines	Boston, Mass.	290,354.75	0.00	290,354.75
3	Creative Planning	Overland Park, Kan.	130,496.99	3,333.64	133,830.63
4	Global Retirement Partners	San Rafael, Calif.	24,608.61	82,511.60	107,120.21
5	Hightower Advisors	Chicago, Ill.	102,576.35	1,044.00	103,620.35
6	Fort Washington Investment Advisors	Cincinnati, Ohio	73,458.24	4,875.98	78,334.22
7	CIBC Private Wealth Advisors	Atlanta, Ga.	67,640.75	6,134.70	73,775.46
8	Mariner Wealth Advisors	Overland Park, Kan.	51,151.39	4,281.26	55,432.64
9	Wealth Enhancement Advisory Services	Plymouth, Minn.	46,469.10	6,139.60	52,608.71
10	Kayne Anderson Rudnick Investment Mgmt	Los Angeles, Calif.	47,269.30	0.00	47,269.30
11	Cerity Partners	New York, N.Y.	26,764.08	17,906.45	44,670.53
12	Chevy Chase Trust	Bethesda, Md.	39,184.72	0.00	39,184.72
13	Fiducient Advisors	Chicago, Ill.	12,821.91	25,053.98	37,875.89
14	Mercer Global Advisors	Denver, Colo.	32,940.62	1,070.91	34,011.52
15	Moneta	St. Louis, Mo.	18,237.58	14,651.18	32,888.76
16	Silvercrest Asset Management Group	New York, N.Y.	25,073.27	7,246.40	32,319.68
17	Advanced Capital Group	Minneapolis, Minn.	625.80	29,149.59	29,775.39
18	BBR Partners	New York, N.Y.	23,602.20	2,365.50	25,967.70
19	Segall Bryant & Hamill	Chicago, Ill.	25,590.36	52.41	25,642.77
20	Evoke Advisors	Los Angeles, Calif.	10,298.84	15,161.62	25,460.46
21	Beacon Pointe Advisors	Newport Beach, Calif.	20,263.14	3,411.40	23,674.54
22	Cresset Capital	Chicago, Ill.	19,199.05	3,768.81	22,967.86
23	Buckingham Strategic Wealth	St. Louis, Mo.	21,202.53	1,656.17	22,858.70
24	Pathstone	Englewood, N.J.	15,991.12	6,613.73	22,604.85
25	Tiedemann Advisors	New York, N.Y.	16,794.48	4,438.41	21,232.90
26	1919 Investment Counsel	New York, N.Y.	20,219.32	143.83	20,363.15
27	Carson Wealth	Omaha, Neb.	19,991.55	29.61	20,021.17
28	Plante Moran Financial Advisors	Southfield, Mich.	9,808.81	10,017.46	19,826.27
29	AE Wealth Management	Topeka, Kan.	19,640.09	0.00	19,640.09
30	Johnson Investment Counsel	Cincinnati, Ohio	18,527.70	236.01	18,763.71
31	The Colony Group	Boston, Mass.	15,847.71	2,791.01	18,638.72
32	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	17,604.44	397.08	18,001.52
33	Wealthspire Advisors	New York, N.Y.	17,154.12	293.96	17,448.09
34	Oxford Financial Group	Carmel, Ind.	7,264.28	9,799.67	17,063.96
35	Newport Capital Group	Red Bank, N.J.	269.48	16,300.86	16,570.34
36	Aspiriant	Los Angeles, Calif.	12,334.57	3,142.46	15,477.03
37	LeafHouse Financial	Austin, Texas	14,216.84	1,236.74	15,453.59
38	MAI Capital Management	Cleveland, Ohio	13,535.14	850.96	14,386.11
39	Allworth Financial	Folsom, Calif.	13,408.84	373.38	13,782.22
40	WE Family Offices	Miami, Fla.	0.00	13,382.46	13,382.46
41	Savant Wealth Management	Rockford, Ill.	13,130.28	0.00	13,130.28
42	Signature Estate & Investment Advisors	Los Angeles, Calif.	1,272.18	11,454.26	12,726.44
43	Appleton Partners	Boston, Mass.	12,509.80	0.00	12,509.80
44	Evercore Wealth Management	New York, N.Y.	12,093.89	89.70	12,183.59
45	myCIO Wealth Partners	Philadelphia, Pa.	463.27	11,376.86	11,840.13
46	Clearstead Advisors	Cleveland, Ohio	7,644.85	3,580.84	11,225.68
47	Homrich Berg	Atlanta, Ga.	9,543.57	1,539.35	11,082.92
48	Williams Jones Wealth Management	New York, N.Y.	10,820.38	132.98	10,953.35
49	Ballentine Partners	Waltham, Mass.	7,650.88	2,868.91	10,519.79
50	GW & Wade	Wellesley, Mass.	10,380.55	23.44	10,403.99

*Discretionary and nondiscretionary AUM can also be found on Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ‡‡Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. ‡‡‡C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact **Aaron Deyang** at **FAMag@wrightsmedia.com**.

FA's 2022 RIA RANKING

Commonwealth



RAYMOND JAMES

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2021 (\$MM)	NON-DISCRETIONARY ASSETS 2021 (\$MM)	YEAR END 2021 ASSETS (\$MM)*
51	Sequoia Financial Group	Akron, Ohio	8,282.76	1,808.15	10,090.92
52	Brighton Jones	Seattle, Wash.	9,949.15	101.65	10,050.81
53	Choreo	Minneapolis, Minn.	7,828.27	2,149.72	9,977.99
54	Investment Research & Advisory Group	Atlanta, Ga.	457.00	9,200.00	9,657.00
55	Mill Creek Capital Advisors	Conshohocken, Pa.	8,728.12	708.85	9,436.96
56	CV Advisors	Aventura, Fla.	682.11	8,724.50	9,406.62
57	Freestone Capital Management	Seattle, Wash.	7,367.94	1,561.24	8,929.18
58	Johnson Wealth	Milwaukee, Wis.	6,922.84	1,881.38	8,804.22
59	The Mather Group	Chicago, Ill.	7,584.24	995.52	8,579.76
60	Douglas C. Lane & Associates	New York, N.Y.	8,475.47	0.00	8,475.47
61	Brookstone Capital Management	Wheaton, Ill.	8,404.35	0.00	8,404.35
62	Tolleson Wealth Management	Dallas, Texas	7,756.33	425.55	8,181.88
63	Bartlett Wealth Management	Cincinnati, Ohio	7,854.98	323.58	8,178.56
64	Welch & Forbes	Boston, Mass.	7,563.79	242.95	7,806.73
65	Kovitz Investment Group Partners	Chicago, Ill.	7,801.47	0.00	7,801.47
66	Conrad Siegel Investment Advisors	Harrisburg, Pa.	2,253.45	5,364.57	7,618.02
67	Cornerstone Advisors Asset Management	Bethlehem, Pa.	3,649.36	3,962.41	7,611.77
68	Ropes Wealth Advisors	Boston, Mass.	7,321.64	181.23	7,502.87
69	Forum Financial Management	Lombard, Ill.	7,311.38	87.91	7,399.29
70	Valeo Financial Advisors	Carmel, Ind.	4,996.07	2,281.77	7,277.85
71	Wetherby Asset Management	San Francisco, Calif.	7,048.91	223.92	7,272.83
72	Adviser Investments	Newton, Mass.	7,249.68	0.20	7,249.88
73	Coldstream Wealth Management	Bellevue, Wash.	7,039.60	179.70	7,219.30
74	Monroe Vos Consulting	Houston, Texas	0.00	7,149.25	7,149.25
75	Modera Wealth Management	Westwood, N.J.	6,894.51	56.03	6,950.53
76	Joel Isaacson & Co.	New York, N.Y.	3,828.85	2,925.36	6,754.22
77	Altair Advisors	Chicago, Ill.	2,261.00	4,422.26	6,683.26
78	Heck Capital Advisors	Rhineland, Wis.	1,461.70	5,212.97	6,674.67
79	Plancorp	St. Louis, Mo.	6,600.16	5.04	6,605.20
80	Thrivent Advisor Network	Minneapolis, Minn.	6,301.88	227.29	6,529.17
81	Gofen and Glossberg	Chicago, Ill.	6,158.89	320.33	6,479.22
82	Clarfeld Financial Advisors	Tarrytown, N.Y.	3,340.73	3,130.38	6,471.11
83	RegentAtlantic	Morristown, N.J.	6,161.27	43.92	6,205.19
84	Zeke Capital Advisors	Berwyn, Pa.	4,663.22	1,501.43	6,164.65
85	SignatureFD	Atlanta, Ga.	5,664.69	479.27	6,143.96
86	Greenspring Advisors	Towson, Md.	1,780.71	4,345.52	6,126.23
87	Bradley, Foster & Sargent	Hartford, Conn.	6,124.00	0.65	6,124.65
88	Dowling & Yahnke Wealth Advisors	San Diego, Calif.	5,989.29	124.04	6,113.33
89	BDF LLC	Itasca, Ill.	5,917.75	0.00	5,917.75
90	RGT Wealth Advisors	Dallas, Texas	5,555.77	195.40	5,751.17
91	Caprock	Boise, Idaho	5,480.54	261.02	5,741.56
92	WMS Partners	Towson, Md.	4,054.75	1,619.50	5,674.25
93	Northside Capital Management	Hood River, Ore.	3,359.37	2,274.73	5,634.10
94	Bailard, Inc.	Foster City, Calif.	5,612.71	20.44	5,633.15
95	Alesco Advisors	Pittsford, N.Y.	4,660.45	805.12	5,465.58
96	Ingalls & Snyder	New York, N.Y.	5,294.32	151.60	5,445.93
97	Parallel Advisors	San Francisco, Calif.	5,440.39	2.77	5,443.16
98	CI Brightworth	Atlanta, Ga.	5,364.75	0.00	5,364.75
99	Advisors Capital Management	Ridgewood, N.J.	5,346.41	0.00	5,346.41
100	HBKS Wealth Advisors	Erie, Pa.	5,238.16	102.96	5,341.13
101	GYL Financial Synergies	West Hartford, Conn.	3,094.83	2,221.87	5,316.70

*Discretionary and nondiscretionary AUM can also be found on Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. †††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact **Aaron Deyang** at **FAMag@wrightsmedia.com**.

FA's 2022 RIA RANKING

Commonwealth



RAYMOND JAMES

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2021 (\$MM)	NON-DISCRETIONARY ASSETS 2021 (\$MM)	YEAR END 2021 ASSETS (\$MM)*
102	Allegheny Financial Group	Pittsburgh, Pa.	4,853.37	275.65	5,129.02
103	Fort Pitt Capital Group	Pittsburgh, Pa.	4,993.38	5.84	4,999.22
104	Wilbanks, Smith & Thomas Asset Management	Norfolk, Va.	4,905.99	64.42	4,970.41
105	Crestwood Advisors	Boston, Mass.	4,901.50	61.96	4,963.45
106	Index Fund Advisors	Irvine, Calif.	4,937.68	0.00	4,937.68
107	Edge Capital Group	Atlanta, Ga.	4,577.38	306.85	4,884.23
108	Geller Advisors	New York, N.Y.	4,817.56	19.88	4,837.44
109	Mission Wealth Management	Santa Barbara, Calif.	3,956.38	858.73	4,815.11
110	Retirement Planners of America	Plano, Texas	4,709.35	95.52	4,804.87
111	Zhang Financial	Portage, Mich.	2,748.59	2,035.78	4,784.38
112	Badgley Phelps Wealth Managers	Seattle, Wash.	4,491.52	277.91	4,769.43
113	Beacon Capital Management	Dayton, Ohio	4,680.02	64.07	4,744.09
114	JMG Financial Group	Downers Grove, Ill.	4,539.00	177.00	4,716.00
115	Cassaday & Company	Mclean, Va.	4,647.15	0.00	4,647.15
116	Truepoint Wealth Counsel	Cincinnati, Ohio	4,635.73	7.26	4,642.98
117	Annex Wealth Management	Elm Grove, Wis.	4,392.02	203.15	4,595.18
118	Kovack Advisors	Fort Lauderdale, Fla.	3,514.64	1,032.65	4,547.28
119	F.L.Putnam Investment Management Company	Wellesley, Mass.	4,501.33	45.85	4,547.18
120	Camden Capital	North Palm Beach, Fla.	3,142.63	1,361.38	4,504.00
121	Inverness Counsel	New York, N.Y.	3,839.49	629.47	4,468.95
122	WA Asset Management	Birmingham, Ala.	4,295.46	170.38	4,465.84
123	Finaccess Advisors	Miami, Fla.	0.00	4,446.18	4,446.18
124	Gradient Investments	Arden Hills, Minn.	4,375.74	0.00	4,375.74
125	Exencial Wealth Advisors	Oklahoma City, Okla.	4,049.51	311.03	4,360.55
126	Crescent Grove Advisors	Lake Forest, Ill.	4,295.59	59.22	4,354.81
127	Brownson, Rehmus & Foxworth	Chicago, Ill.	0.00	4,298.88	4,298.88
128	Parsec Financial	Asheville, N.C.	4,000.95	225.36	4,226.30
129	Covington Capital Management	Los Angeles, Calif.	4,174.64	29.54	4,204.19
130	Clifford Swan Investment Counselors	Pasadena, Calif.	3,515.00	672.00	4,187.00
131	Crestone Capital	Boulder, Colo.	3,787.96	386.55	4,174.50
132	Bordeaux Wealth Advisors	Menlo Park, Calif.	3,371.14	736.73	4,107.87
133	Frontier Wealth Management	Kansas City, Mo.	2,982.88	1,119.47	4,102.34
134	Beacon Investment Advisory Services	Morristown, N.J.	3,901.00	192.00	4,093.00
135	Prio Wealth	Boston, Mass.	4,081.46	0.00	4,081.46
136	Advance Capital Management	Southfield, Mich.	4,018.99	50.55	4,069.54
137	Pure Financial Advisors	San Diego, Calif.	3,958.78	44.58	4,003.36
138	Carnegie Investment Counsel	Pepper Pike, Ohio	3,953.19	28.66	3,981.84
139	Cary Street Partners Investment Advisory	Richmond, Va.	1,872.73	2,073.42	3,946.15
140	Robertson Stephens Wealth Management	San Francisco, Calif.	3,006.23	924.76	3,930.99
141	Mainstay Capital Management	Grand Blanc, Mich.	3,485.15	373.59	3,858.74
142	Westmount Asset Management	Los Angeles, Calif.	3,455.54	381.95	3,837.49
143	TCI Wealth Advisors	Tucson, Ariz.	3,748.28	16.19	3,764.47
144	Merriman Wealth Management	Seattle, Wash.	3,694.33	0.00	3,694.33
145	Hamilton Capital	Columbus, Ohio	3,396.53	237.98	3,634.51
146	Heritage Investors Management Corporation	Bethesda, Md.	3,604.15	11.77	3,615.92
147	Axxcess Wealth Management	Carlsbad, Calif.	2,911.74	676.78	3,588.52
148	TFO Phoenix	Phoenix, Ariz.	3,562.75	13.24	3,575.98
149	TFO-TDC, LLC dba TDC Investment Advisory	Maumee, Ohio	3,523.21	27.87	3,551.09
150	JFS Wealth Advisors	Hermitage, Pa.	3,103.86	430.71	3,534.57
151	CM Wealth Advisors	Beachwood, Ohio	3,364.12	169.85	3,533.97
152	Gratus Capital	Atlanta, Ga.	2,443.77	1,055.63	3,499.40

*Discretionary and nondiscretionary AUM can also be found on Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact **Aaron Deyang** at **FAMag@wrightsmedia.com**.

FA's 2022 RIA RANKING

Commonwealth



RAYMOND JAMES

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2021 (\$MM)	NON-DISCRETIONARY ASSETS 2021 (\$MM)	YEAR END 2021 ASSETS (\$MM)*
153	Kingsview Partners	Grants Pass, Ore.	3,479.62	0.00	3,479.62
154	Wescott Financial Advisory Group	Philadelphia, Pa.	2,558.81	894.04	3,452.85
155	Lake Street Advisors	Portsmouth, N.H.	1,307.73	2,087.65	3,395.38
156	Foster Group	West Des Moines, Iowa	3,241.15	152.23	3,393.38
157	Accredited Investors Wealth Management	Edina, Minn.	3,211.28	171.98	3,383.26
158	Telemus Capital	Southfield, Mich.	2,655.06	706.78	3,361.84
159	HoyleCohen	San Diego, Calif.	3,236.70	0.00	3,236.70
160	Foundations Investment Advisors	Phoenix, Ariz.	3,099.44	78.22	3,177.66
161	Carlson Capital Management	Northfield, Minn.	3,146.44	18.10	3,164.54
162	Chicago Capital	Chicago, Ill.	3,145.39	9.11	3,154.51
163	Family Management Corporation	New York, N.Y.	3,098.86	50.10	3,148.96
164	GM Advisory Group	Melville, N.Y.	1,693.27	1,448.13	3,141.40
165	Klingman & Associates	New York, N.Y.	2,880.78	239.43	3,120.21
166	Wellesley Asset Management	Wellesley, Mass.	3,116.83	2.05	3,118.89
167	Miracle Mile Advisors	Los Angeles, Calif.	3,061.69	5.65	3,067.35
168	Halbert Hargrove	Long Beach, Calif.	2,851.85	179.14	3,030.98
169	Beaumont Financial Partners	Needham, Mass.	2,189.39	837.65	3,027.04
170	Constellation Wealth Advisors	Cincinnati, Ohio	1,655.20	1,362.91	3,018.11
171	Sage Financial Group	Conshohocken, Pa.	2,771.03	244.90	3,015.93
172	LaSalle St. Investment Advisors	Elmhurst, Ill.	646.14	2,301.48	2,947.62
173	Barrett Asset Management	New York, N.Y.	2,874.24	63.10	2,937.34
174	Wealthcare Capital Management	Richmond, Va.	2,880.83	36.15	2,916.98
175	True North Advisors	Dallas, Texas	2,843.58	28.17	2,871.74
176	AJ Wealth	New York, N.Y.	1,699.98	1,156.41	2,856.39
177	Coastal Bridge Advisors	Westport, Conn.	2,842.45	12.41	2,854.86
178	Connectus Wealth Advisers†	Greenwich, Conn.	2,845.10	0.00	2,845.10
179	Radnor Financial Advisors	Wayne, Pa.	2,789.75	24.64	2,814.39
180	Henssler Financial	Kennesaw, Ga.	2,245.21	530.56	2,775.78
181	JFG Wealth Management††	Denver, Colo.	2,250.11	500.51	2,750.62
182	Arnerich Massena	Portland, Ore.	1,212.42	1,537.10	2,749.52
183	GenTrust	Miami, Fla.	2,305.35	439.01	2,744.35
184	Evensky & Katz	Coral Gables, Fla.	2,739.10	2.37	2,741.46
185	MCF Advisors	Covington, Ky.	1,626.25	1,069.32	2,695.57
186	IFG Advisory	Atlanta, Ga.	2,527.41	164.35	2,691.76
187	Altium Wealth Management	Purchase, N.Y.	2,686.67	0.00	2,686.67
188	SJS Investment Services	Sylvania, Ohio	2,447.42	228.53	2,675.95
189	Resource Consulting Group	Orlando, Fla.	2,642.74	0.00	2,642.74
190	Zemenick & Walker	St. Louis, Mo.	0.00	2,557.98	2,557.98
191	Birch Hill Investment Advisors	Boston, Mass.	2,511.07	0.00	2,511.07
192	Chesley, Taft & Associates	Chicago, Ill.	2,307.99	184.81	2,492.79
193	Cabana Asset Management	Fayetteville, Ark.	2,487.88	0.00	2,487.88
194	Greenwich Wealth Management	Greenwich, Conn.	2,027.06	455.04	2,482.10
195	Schneider Downs Wealth Mgmt Advisors	Pittsburgh, Pa.	1,730.52	741.32	2,471.84
196	The Welch Group	Birmingham, Ala.	2,449.94	0.00	2,449.94
197	Pittenger & Anderson	Lincoln, Neb.	2,423.73	0.00	2,423.73
198	Morton Wealth	Calabasas, Calif.	2,375.24	41.04	2,416.28
199	Financial Advisory Service	Leawood, Kan.	2,364.48	46.81	2,411.29
200	Retirement Income Solutions	Ann Arbor, Mich.	2,403.82	0.00	2,403.82
201	Connecticut Wealth Management	Farmington, Conn.	2,302.26	82.94	2,385.20
202	Summitry	Foster City, Calif.	2,258.90	123.41	2,382.31
203	Apella Capital	Glastonbury, Conn.	2,357.00	0.00	2,357.00

*Discretionary and nondiscretionary AUM can also be found on Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connectus Wealth. ††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact **Aaron Deyang** at **FAMag@wrightsmedia.com**.

FA's 2022 RIA RANKING

Commonwealth



RAYMOND JAMES

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2021 (\$MM)	NON-DISCRETIONARY ASSETS 2021 (\$MM)	YEAR END 2021 ASSETS (\$MM)*
204	Relative Value Partners	Northbrook, Ill.	1,663.42	645.60	2,309.02
205	West Financial Services	McLean, Va.	2,262.05	21.25	2,283.30
206	XML Financial Group	Rockville, Md.	1,779.42	478.32	2,257.74
207	Osborne Partners Capital Management	San Francisco, Calif.	1,780.24	463.02	2,243.25
208	Vigilant Capital Management	Portland, Maine	2,240.16	0.00	2,240.16
209	Heritage Financial Services	Westwood, Mass.	2,228.36	0.00	2,228.36
210	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	2,132.07	84.73	2,216.80
211	LVW Advisors	Pittsford, N.Y.	1,642.69	558.38	2,201.07
212	Beirne Wealth Consulting Services	Shelton, Conn.	594.73	1,601.70	2,196.43
213	RTD Financial Advisors	Philadelphia, Pa.	2,168.47	23.09	2,191.56
214	Principle Wealth Partners	Madison, Conn.	2,190.00	0.00	2,190.00
215	Courier Capital	Buffalo, N.Y.	1,878.89	301.43	2,180.33
216	Certified Advisory Corp	Altamonte Springs, Fla.	2,178.85	0.00	2,178.85
217	CPS Investment Advisors	Lakeland, Fla.	2,172.88	0.00	2,172.88
218	Marcum Wealth	Cleveland, Ohio	2,038.28	133.18	2,171.46
219	SteelPeak Wealth	Woodland Hills, Calif.	2,139.64	24.02	2,163.66
220	BerganKDV Wealth Management	Bloomington, Minn.	932.08	1,210.55	2,142.63
221	Capstone Financial Advisors	Downers Grove, Ill.	2,091.90	7.06	2,098.96
222	McKinley Carter Wealth Services	Wheeling, W.Va.	2,038.46	56.43	2,094.89
223	CFS Investment Advisory Services	Totowa, N.J.	1,202.08	881.34	2,083.42
224	Legacy Wealth Management	Memphis, Tenn.	1,975.31	101.18	2,076.49
225	BLB&B Advisors	Montgomeryville, Pa.	1,929.67	135.42	2,065.09
226	Regal Investment Advisors	Kentwood, Mich.	2,039.86	18.16	2,058.02
227	Foster & Motley	Cincinnati, Ohio	2,009.69	47.90	2,057.59
228	Fairway Wealth Management	Independence, Ohio	6.10	2,017.28	2,023.38
229	Capital Wealth Advisors	Naples, Fla.	1,901.55	117.24	2,018.79
230	Colorado Financial Management	Boulder, Colo.	2,000.00	0.00	2,000.00
231	Pinnacle Wealth Planning Services	Mansfield, Ohio	1,976.74	15.12	1,991.86
232	Gamble Jones Investment Counsel	Pasadena, Calif.	976.35	1,010.53	1,986.88
233	Guyasuta Investment Advisors	Pittsburgh, Pa.	1,985.80	0.00	1,985.80
234	Inspire Investing	Meridian, Idaho	1,984.84	0.00	1,984.84
235	SFMG Wealth Advisors	Plano, Texas	1,844.48	130.88	1,975.36
236	Polaris Wealth Advisory Group	San Rafael, Calif.	1,874.67	87.66	1,962.33
237	Main Street Research	Sausalito, Calif.	1,957.76	0.00	1,957.76
238	Artemis Wealth Advisors	New York, N.Y.	1,753.38	193.01	1,946.39
239	Glassman Wealth Services	Vienna, Va.	1,942.82	0.00	1,942.82
240	Windsor Wealth Management	Indianapolis, Ind.	1,941.34	0.08	1,941.42
241	Bogart Wealth	McLean, Va.	1,364.07	561.04	1,925.11
242	LBMC Investment Advisors	Brentwood, Tenn.	1,871.71	25.16	1,896.87
243	IPI Wealth Management	Decatur, Ill.	1,709.07	174.75	1,883.81
244	Ashfield Capital Partners	San Francisco, Calif.	1,861.13	0.00	1,861.13
245	Sadoff Investment Management	Milwaukee, Wis.	1,859.84	0.00	1,859.84
246	Strategic Financial Services	Utica, N.Y.	1,813.25	24.82	1,838.07
247	Ensemble Capital	San Francisco, Calif.	1,821.91	0.00	1,821.91
248	Stonebridge Capital Advisors	Saint Paul, Minn.	1,758.23	46.79	1,805.01
249	ProVise Management Group	Clearwater, Fla.	1,759.96	9.30	1,769.26
250	Prosperity Capital Advisors ^{††}	Westlake, Ohio	1,737.14	0.00	1,737.14
251	Independent Asset Advisors	Wynnewood, Pa.	1,717.39	0.00	1,717.39
252	Cornerstone Advisory	Hunt Valley, Md.	1,702.23	0.00	1,702.23
253	Condor Capital Wealth Management	Martinsville, N.J.	1,448.42	227.43	1,675.86
254	Wealthquest	Cincinnati, Ohio	1,669.86	4.13	1,673.99

*Discretionary and nondiscretionary AUM can also be found on Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. †††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. ††††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact **Aaron Deyang** at **FAMag@wrightsmedia.com**.

FA's 2022 RIA RANKING

Commonwealth



RAYMOND JAMES

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2021 (\$MM)	NON-DISCRETIONARY ASSETS 2021 (\$MM)	YEAR END 2021 ASSETS (\$MM)*
255	Trilogy Capital	Huntington Beach, Calif.	1,668.53	0.00	1,668.53
256	California Financial Advisors	San Ramon, Calif.	1,380.08	269.02	1,649.11
257	Fairview Capital	Greenbrae, Calif.	1,646.33	0.00	1,646.33
258	Round Table Wealth Management	Westfield, N.J.	1,459.73	176.84	1,636.57
259	Meyer Capital Group	Marlton, N.J.	1,112.68	523.17	1,635.85
260	Patriot Investment Management	Knoxville, Tenn.	1,605.42	5.30	1,610.71
261	Durbin Bennett Private Wealth Management	Austin, Texas	1,582.13	23.01	1,605.14
262	Van Hulzen Asset Management	El Dorado Hills, Calif.	1,595.34	6.53	1,601.87
263	Baltimore Washington Financial Advisors	Columbia, Md.	1,560.00	40.00	1,600.00
264	Elser Financial Planning	Indianapolis, Ind.	648.99	930.10	1,579.10
265	Altfest Personal Wealth Mangement	New York, N.Y.	1,527.96	27.31	1,555.26
266	United Asset Strategies	Garden City, N.Y.	1,377.10	165.80	1,542.90
267	Beard Harris Wealth Management	Dallas, Texas	1,402.05	120.66	1,522.71
268	ML&R Wealth Management	Austin, Texas	1,493.00	9.17	1,502.17
269	Cable Hill Partners	Portland, Ore.	1,263.00	236.00	1,499.00
270	Tschetter Group	Bellevue, Wash.	926.83	545.00	1,471.83
271	UMAFS	Salt Lake City, Utah	936.74	531.87	1,468.61
272	Diversified Portfolios	Bloomfield Hills, Mich.	1,431.76	34.58	1,466.34
273	Aveo Capital Partners	Englewood, Colo.	1,192.14	261.19	1,453.32
274	AlphaCore Wealth Advisory	La Jolla, Calif.	1,312.00	128.00	1,440.00
275	Sather Financial Group	Victoria, Texas	1,430.98	0.00	1,430.98
276	RKL Wealth Management	Lancaster, Pa.	1,249.06	181.29	1,430.35
277	Paragon Capital Management	Denver, Colo.	1,275.79	147.25	1,423.04
278	Quadrant Private Wealth	Bethlehem, Pa.	1,405.74	4.28	1,410.01
279	TFC Financial Management	Boston, Mass.	1,394.09	0.00	1,394.09
280	Per Stirling Capital Management	Austin, Texas	1,372.99	0.00	1,372.99
281	Austin Asset	Austin, Texas	1,366.01	0.00	1,366.01
282	3EDGE Asset Management	Boston, Mass.	1,365.18	0.00	1,365.18
283	SAX Wealth Advisors	Parsippany, N.J.	1,329.72	31.16	1,360.87
284	Nadler Financial Group	Deerfield, Ill.	1,360.47	0.00	1,360.47
285	R W Investment Management	Boise, Idaho	1,108.23	247.82	1,356.05
286	Smith Anglin Financial	Dallas, Texas	1,280.89	27.05	1,307.93
287	Madison Wealth Management	Cincinnati, Ohio	1,293.78	0.00	1,293.78
288	Azzad Asset Management	Falls Church, Va.	1,268.94	7.97	1,276.91
289	RK Capital	Knoxville, Tenn.	771.37	500.00	1,271.37
290	Valley National Financial Advisors	Bethlehem, Pa.	1,250.23	4.46	1,254.69
291	Romano Wealth Management	Evanston, Ill.	1,254.16	0.00	1,254.16
292	Prism Financial Group	Overland Park, Kan.	1,100.49	152.35	1,252.84
293	Prudent Investor Advisors	Folsom, Calif.	74.72	1,173.32	1,248.04
294	Diversified	Wilmington, Del.	1,131.94	103.06	1,235.00
295	Rollins Financial Advisors	Atlanta, Ga.	1,225.52	0.00	1,225.52
296	TrinityPoint Wealth	Milford, Conn.	1,097.75	127.05	1,224.80
297	Weatherly Asset Management	Del Mar, Calif.	1,209.26	9.59	1,218.85
298	Avitas Wealth Management	Los Angeles, Calif.	1,023.09	191.74	1,214.83
299	Segment Wealth Management	Houston, Texas	1,210.37	0.00	1,210.37
300	JB Capital	Wethersfield, Conn.	1,208.95	0.00	1,208.95
301	Telos Capital Management	San Diego, Calif.	1,197.35	0.00	1,197.35
302	Red Door Wealth Management	Memphis, Tenn.	910.67	277.28	1,187.95
303	Patton Albertson Miller Group	Chattanooga, Tenn.	1,184.31	0.00	1,184.31
304	Magnus Financial Group	New York, N.Y.	1,129.78	50.24	1,180.02
305	StraightLine Group	Troy, Mich.	1,122.42	56.77	1,179.19

*Discretionary and nondiscretionary AUM can also be found on Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ‡‡Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. ‡‡‡C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact **Aaron Deyang** at **FAMag@wrightsmedia.com**.

FA's 2022 RIA RANKING

Commonwealth



RAYMOND JAMES

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2021 (\$MM)	NON-DISCRETIONARY ASSETS 2021 (\$MM)	YEAR END 2021 ASSETS (\$MM)*
306	Intelligence Driven Advisers	Carlsbad, Calif.	849.59	319.91	1,169.50
307	Traphagen Investment Advisors	Oradell, N.J.	1,135.29	25.84	1,161.12
308	Wealthstream Advisors	New York, N.Y.	1,157.00	0.00	1,157.00
309	Financial Synergies Wealth Advisors	Houston, Texas	1,155.37	0.00	1,155.37
310	BigSur Partners	Miami, Fla.	596.19	557.15	1,153.34
311	SPC Financial	Rockville, Md.	1,141.11	4.01	1,145.12
312	Cahaba Wealth Management	Atlanta, Ga.	1,142.78	0.00	1,142.78
313	Retirement Investment Advisors	Oklahoma City, Okla.	1,117.42	14.04	1,131.46
314	PDS Planning	Dublin, Ohio	1,056.62	74.55	1,131.18
315	The Advisory Group San Francisco	San Francisco, Calif.	1,114.73	0.00	1,114.73
316	BFSG	Irvine, Calif.	1,104.21	0.43	1,104.64
317	Blue Chip Partners	Farmington Hills, Mich.	1,090.64	8.14	1,098.78
318	Corrigan Financial	Middletown, R.I.	1,084.36	2.25	1,086.61
319	Delta Financial Group	Basking Ridge, N.J.	1,015.39	60.85	1,076.24
320	Mayflower Advisors	Boston, Mass.	1,074.55	0.19	1,074.74
321	Virtue Capital Management	Brentwood, Tenn.	1,071.52	0.00	1,071.52
322	Agili	Richmond, Va.	1,065.39	1.15	1,066.54
323	Christopher Weil & Company	San Diego, Calif.	1,015.77	46.51	1,062.28
324	Titleist Asset Management	San Antonio, Texas	963.84	95.33	1,059.17
325	NEIRG Wealth Management	North Andover, Mass.	1,010.92	16.65	1,027.57
326	Beacon Financial Group	Dallas, Texas	1,020.14	0.00	1,020.14
327	Pinkerton Retirement Specialists	Coeur D'Alene, Idaho	891.63	128.37	1,020.00
328	Petersen Hastings Investment Management	Kennebec, Wash.	1,011.69	0.00	1,011.69
329	Nilsine Partners	Greenwood Village, Colo.	777.20	232.07	1,009.27
330	Apriem Advisors	Irvine, Calif.	1,000.65	7.24	1,007.89
331	Financial Planning & Information Services	De Pere, Wis.	1,007.52	0.00	1,007.52
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION					
332	Janiczek Wealth Management	Denver, Colo.	985.25	0.00	985.25
333	Spectrum Wealth Management	Indianapolis, Ind.	955.83	21.29	977.12
334	MJP Wealth Advisors	Farmington, Conn.	942.12	25.16	967.28
335	Kowal Investment Group	Waukesha, Wis.	960.97	0.00	960.97
336	REDW Wealth	Albuquerque, N.M.	955.10	0.00	955.10
337	Seasons of Advice Wealth Management	New York, N.Y.	899.67	44.44	944.11
338	Hemington Wealth Management	Falls Church, Va.	934.28	0.00	934.28
339	Total Wealth Planning	Cincinnati, Ohio	872.81	59.70	932.51
340	Destiny Wealth Partners	Tavares, Fla.	931.15	0.00	931.15
341	DiNuzzo Private Wealth	Beaver, Pa.	929.49	0.00	929.49
342	Vintage Financial Services	Ann Arbor, Mich.	923.41	0.00	923.41
343	Moisand Fitzgerald Tamayo	Orlando, Fla.	913.61	8.36	921.97
344	Willis Johnson & Associates	Houston, Texas	877.18	37.69	914.87
345	WPWealth	Fort Worth, Texas	645.82	268.74	914.56
346	LS Investment Advisors dba LSIA	Bloomfield Hills, Mich.	912.86	0.00	912.86
347	Fusion Family Wealth	Woodbury, N.Y.	894.88	17.33	912.21
348	Regatta Capital Group	El Segundo, Calif.	753.58	153.29	906.87
349	SoundPath Investment Advisors	Ridgeland, Miss.	904.36	0.00	904.36
350	Delegate Advisors	Chapel Hill, N.C.	166.91	736.41	903.33
351	HCM Wealth Advisors	Cincinnati, Ohio	894.57	0.00	894.57
352	Archford	Swansea, Ill.	889.99	0.00	889.99
353	Lake Street	Chicago, Ill.	825.71	55.07	880.78
354	Halpern Financial	Ashburn, Va.	863.21	0.00	863.21
355	Financial Advisory Corporation	Grand Rapids, Mich.	854.33	0.01	854.33

*Discretionary and nondiscretionary AUM can also be found on Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. †‡AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. †††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. ††††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact **Aaron Deyang** at **FAMag@wrightsmedia.com**.

FA's 2022 RIA RANKING

Commonwealth



RAYMOND JAMES

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2021 (\$MM)	NON-DISCRETIONARY ASSETS 2021 (\$MM)	YEAR END 2021 ASSETS (\$MM)*
356	Yeske Buie	San Francisco, Calif.	841.24	11.14	852.39
357	Southern Financial Group	Birmingham, Ala.	837.33	0.00	837.33
358	Stage Harbor Financial	Needham, Mass.	836.37	0.00	836.37
359	WorthPointe	San Diego, Calif.	816.61	0.21	816.83
360	Concentus Wealth Advisors	Newtown Square, Pa.	767.18	27.58	794.76
361	Abound Wealth Management	Franklin, Tenn.	758.60	32.79	791.40
362	Blankinship & Foster	Solana Beach, Calif.	786.49	0.00	786.49
363	Buckingham Advisors	Dayton, Ohio	750.88	34.70	785.57
364	Canal Capital Management	Richmond, Va.	683.70	101.31	785.01
365	Ullmann Wealth Partners	Jacksonville Beach, Fla.	756.01	9.22	765.23
366	Claro Advisors	Boston, Mass.	718.44	44.55	762.99
367	Insight Wealth Partners	Plano, Texas	758.22	1.91	760.13
368	CapSouth Wealth Management	Dothan, Ala.	292.00	467.00	759.00
369	Rappaport Reiches Capital Management	Skokie, Ill.	745.00	0.00	745.00
370	Socius Family Office	Fort Lauderdale, Fla.	629.26	104.43	733.69
371	Omega Wealth Partners	Fort Worth, Texas	732.55	0.00	732.55
372	William Mack & Associates	Troy, Mich.	721.39	5.18	726.57
373	Fairhaven Wealth Management	Wheaton, Ill.	711.99	6.99	718.97
374	Asset Management Group	Stamford, Conn.	704.16	0.00	704.16
375	Financial Enhancement Group	Anderson, Ind.	703.48	0.00	703.48
376	Glass Jacobson Investment Advisors	Owings Mills, Md.	681.14	12.83	693.97
377	Great Lakes Retirement	Sheffield Village, Ohio	638.08	53.43	691.51
378	Droms Strauss Wealth Management	St. Louis, Mo.	682.28	4.70	686.98
379	Briaud Financial Advisors	College Station, Texas	677.93	5.37	683.31
380	The L. Warner Companies	Timonium, Md.	681.96	0.00	681.96
381	Omnia Family Wealth	Aventura, Fla.	590.75	87.16	677.92
382	Klaas Financial Asset Advisors	Loves Park, Ill.	522.00	153.00	675.00
383	Next Level Private	Harrison, N.Y.	640.00	30.00	670.00
384	Spectrum Investment Advisors	Mequon, Wis.	656.51	11.01	667.52
385	Frisch Financial Group	Melville, N.Y.	629.80	30.78	660.58
386	Investmark Advisory Group	Shelton, Conn.	653.48	0.00	653.48
387	KMH Wealth Management	Victoria, Texas	639.40	11.37	650.77
388	Tobias Financial Advisors	Plantation, Fla.	628.00	22.00	650.00
389	Optas Capital	Austin, Texas	647.53	0.00	647.53
390	McIlrath & Eck	Arlington, Wash.	645.00	0.00	645.00
391	Dopkins Wealth Management	Williamsville, N.Y.	632.63	4.56	637.19
392	Mirador Capital Partners	Pleasanton, Calif.	632.11	0.00	632.11
393	BlueSky Wealth Advisors	New Bern, N.C.	628.19	0.00	628.19
394	Nelson Capital Management	Menlo Park, Calif.	597.78	28.30	626.08
395	Sterling Financial Planning	Sparta, N.J.	376.26	245.44	621.70
396	Greystone Financial Group	Bloomfield Hills, Mich.	600.35	17.21	617.55
397	Rowling & Associates	San Diego, Calif.	583.08	32.43	615.51
398	Financial Management Strategies	Broadview Heights, Ohio	491.20	116.83	608.03
399	Fi3 Financial Advisors	Indianapolis, Ind.	533.81	72.38	606.19
400	Frazier Financial Advisors	Upper Arlington, Ohio	530.00	65.00	595.00
401	Carolina Wealth Management	Greenville, N.C.	2.02	587.46	589.48
402	Birchwood Financial Partners	Edina, Minn.	561.95	21.86	583.81
403	Grand Wealth Management	Grand Rapids, Mich.	573.22	9.11	582.33
404	Net Worth Advisory Group	Sandy, Utah	341.36	240.33	581.69
405	The High Net Worth Advisory Group	Naples, Fla.	529.57	51.43	581.00
406	Excalibur Management Corp.	Newton Lower Falls, Mass.	562.35	9.64	571.99

*Discretionary and nondiscretionary AUM can also be found on Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. †††AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ††††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. ††††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact **Aaron Deyang** at **FAMag@wrightsmedia.com**.

FA's 2022 RIA RANKING

Commonwealth



RAYMOND JAMES

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2021 (\$MM)	NON-DISCRETIONARY ASSETS 2021 (\$MM)	YEAR END 2021 ASSETS (\$MM)*
407	Marotta Wealth Management	Charlottesville, Va.	550.85	18.73	569.58
408	Peavine Capital	Reno, Nev.	569.00	0.00	569.00
409	Elwood & Goetz Wealth Advisory Group	Athens, Ga.	558.46	0.00	558.46
410	Level Financial Advisors	Amherst, N.Y.	545.20	0.00	545.20
411	Financial Insights Wealth Management	Tacoma, Wash.	533.63	0.00	533.63
412	Hopwood Financial Services	Reston, Va.	531.77	0.00	531.77
413	Jentner Wealth Management	Akron, Ohio	529.60	0.00	529.60
414	NBC Capital Advisors	Beaverton, Ore.	461.00	54.00	515.00
415	J.W. Coons Advisors	Columbus, Ohio	464.26	50.28	514.55
416	Gradient Capital Advisors	San Diego, Calif.	431.04	81.62	512.65
417	Woodward Financial Advisors	Chapel Hill, N.C.	511.25	0.00	511.25
418	Sikich Capital Management	Springfield, Ill.	504.18	0.00	504.18
419	Morling Financial Advisors	Fremont, Calif.	501.41	0.00	501.41
ASSET CATEGORY: \$250 MILLION TO <\$500 MILLION					
420	Mission Creek Capital Partners	San Francisco, Calif.	493.16	0.00	493.16
421	Wealth Care	Merritt Island, Fla.	488.00	0.00	488.00
422	Perspective Wealth Partners	Boise, Idaho	0.00	476.36	476.36
423	Ballast, Inc	Lexington, Ky.	434.95	28.04	462.99
424	Pinnacle Financial Group	Western Springs, Ill.	433.29	25.52	458.81
425	Financial Alternatives	La Jolla, Calif.	436.88	21.67	458.55
426	WJ Interests	Sugar Land, Texas	455.00	0.00	455.00
427	Meritas Wealth Management	Larkspur, Calif.	454.56	0.00	454.56
428	Falcon Wealth Planning	Ontario, Calif.	450.00	2.00	452.00
429	Asset Planning	Cypress, Calif.	445.51	1.18	446.70
430	Wilsey Asset Management	San Diego, Calif.	443.94	0.00	443.94
431	Resolute Financial	Newburyport, Mass.	404.63	39.15	443.78
432	Clune & Associates	Chicago, Ill.	0.00	438.50	438.50
433	Winch Financial	Appleton, Wis.	433.31	0.00	433.31
434	Monument Wealth Management	Alexandria, Va.	407.68	17.21	424.89
435	Transitions Wealth Management	Denver, Colo.	423.41	0.00	423.41
436	QP Consulting	Takoma Park, Md.	38.80	383.71	422.51
437	Palisade Investments	Zephyr Cove, Nev.	97.05	323.95	421.01
438	Fiduciary Wealth Management	Reston, Va.	117.15	303.39	420.54
439	Regency Wealth Management	Ramsey, N.J.	382.92	33.33	416.26
440	THOR Wealth Management	Cincinnati, Ohio	414.50	0.29	414.80
441	Day and Ennis	Macon, Ga.	411.47	1.02	412.48
442	Alpha Financial Advisors	Charlotte, N.C.	412.34	0.00	412.34
443	ARQ Wealth Advisors	Scottsdale, Ariz.	410.00	2.00	412.00
444	Family Office Research	Bethesda, Md.	123.39	280.41	403.80
445	Andrews, Lucia Wealth Management	Danville, Calif.	402.99	0.00	402.99
446	Manske Wealth Management	Houston, Texas	395.83	0.00	395.83
447	KCS Wealth Advisory	Los Angeles, Calif.	386.83	0.00	386.83
448	Poehling Capital Management	Madison, Wis.	376.87	4.40	381.27
449	ShoreHaven Wealth Partners	Red Bank, N.J.	360.01	21.02	381.03
450	Sandbox Financial Partners	Bethesda, Md.	343.80	36.74	380.54
451	Allodium Investment Consultants	Minneapolis, Minn.	374.65	0.00	374.65
452	McCarthy Asset Management, Inc.	Redwood Shores, Calif.	374.03	0.00	374.03
453	Searcy Financial Services	Overland Park, Kan.	356.94	7.34	364.28
454	Trinity Financial Advisors	Columbus, Ohio	360.57	0.00	360.57
455	Socha Financial Group	Corning, N.Y.	357.37	0.00	357.37
456	Baron Financial Group	Fair Lawn, N.J.	342.97	4.07	347.04

*Discretionary and nondiscretionary AUM can also be found on Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ‡‡Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. ‡‡‡C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
 For reprints of this PDF please contact **Aaron Deyang** at **FAMag@wrightsmedia.com**.

FA's 2022 RIA RANKING

Commonwealth



RAYMOND JAMES

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2021 (\$MM)	NON-DISCRETIONARY ASSETS 2021 (\$MM)	YEAR END 2021 ASSETS (\$MM)*
457	Harbor Financial Group dba Harbor Wealth Mgmt	Boulder, Colo.	336.77	4.40	341.17
458	Tim Looney Investments	Lake Mary, Fla.	0.00	338.32	338.32
459	Asset Planning Corporation	Knoxville, Tenn.	320.34	6.22	326.56
460	Samalin Wealth	Chappaqua, N.Y.	284.27	41.22	325.49
461	Legacy Consulting Group	Plano, Texas	308.79	16.32	325.11
462	Fiduciary Financial Advisors	Grand Rapids, Mich.	323.25	0.45	323.70
463	Fidato Wealth	Middleburg Heights, Ohio	311.12	0.00	311.12
464	Sebold Capital Management	Lisle, Ill.	270.11	35.86	305.96
465	WealthCrest Financial Services	Springfield, Va.	305.75	0.00	305.75
466	Sard Wealth Management Group	Atlanta, Ga.	281.90	23.75	305.65
467	Mighty Oak Strong America Investment Company	Mechanicsburg, Pa.	291.15	11.39	302.54
468	Fortune Wealth Management	Dallas, Texas	297.85	2.15	300.01
469	Hixon Zuercher Capital Management	Findlay, Ohio	287.43	12.28	299.72
470	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	295.55	0.00	295.55
471	TL Private Wealth	Southlake, Texas	292.00	0.00	292.00
472	Family Wealth Advisory Group	Cincinnati, Ohio	172.72	93.21	265.92
473	Artemis Financial Advisors	Boston, Mass.	265.37	0.00	265.37
474	Wealthview Capital	Jackson, Miss.	252.82	11.26	264.08
475	MBM Wealth Consultants	Chesterfield, Mo.	258.68	0.00	258.68
476	Advisors Financial	Vienna, Va.	257.20	0.00	257.20
477	Pearson Creek Capital Management	Chicago, Ill.	257.00	0.00	257.00
478	Hanover Advisors	Greenville, S.C.	256.98	0.00	256.98
479	Life Planning Partners	Jacksonville, Fla.	255.71	0.58	256.29
480	Clay Northam Wealth Management	Long Beach, Calif.	253.91	0.00	253.91
ASSET CATEGORY: \$150 MILLION TO <\$250 MILLION					
481	Empyrion Wealth Management	Roseville, Calif.	246.00	0.00	246.00
482	Foresight Capital Management Advisors	Saline, Mich.	235.89	1.35	237.24
483	Summit Place Financial Advisors	Summit, N.J.	231.95	0.00	231.95
484	Centerline Wealth Advisors	Louisville, Ky.	229.14	2.00	231.14
485	Sharper & Granite	El Segundo, Calif.	229.77	0.00	229.77
486	Integrated Capital Management	Bloomfield Hills, Mich.	225.86	1.01	226.87
487	Elite Retirement Planning	Grimes, Iowa	223.75	0.00	223.75
488	Private Capital Management	Larkspur, Calif.	198.65	19.69	218.34
489	Charleston Financial Advisors	Charleston, S.C.	209.41	7.16	216.57
490	Canter Wealth	San Diego, Calif.	211.45	0.00	211.45
491	Pan Global Advisers ^{††}	Costa Mesa, Calif.	127.54	82.28	209.82
492	Professional Financial Strategies	Pittsford, N.Y.	182.39	21.19	203.58
493	FSA Advisors	Warren, Mich.	195.70	2.04	197.74
494	Longview Financial Advisors	Huntsville, Ala.	192.13	0.08	192.21
495	BCK Partners	Corning, N.Y.	191.52	0.00	191.52
496	Investor's Capital Management	Menlo Park, Calif.	180.25	10.72	190.97
497	Center For Asset Management	Palm Beach Gardens, Fla.	187.74	1.59	189.32
498	RHS Financial	San Francisco, Calif.	177.72	7.61	185.33
499	Granite Financial Group	Brookfield, Wis.	185.00	0.00	185.00
500	Purtill Financial	Highland Heights, Ohio	0.00	182.50	182.50
501	Kotys Wealth Professionals	Valparaiso, Ind.	181.49	0.00	181.49
502	Westview Investment Advisors	Charlotte, Vt.	175.28	5.47	180.75
503	TABR Capital Management	Orange, Calif.	179.96	0.00	179.96
504	Kahler Financial Group	Rapid City, S.D.	178.85	0.00	178.85
505	Atwater Wealth Management	Boston, Mass.	172.22	3.98	176.21
506	Gold Medal Waters	Boulder, Colo.	161.44	7.05	168.49

*Discretionary and nondiscretionary AUM can also be found on Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. †††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
 For reprints of this PDF please contact **Aaron Deyang** at **FAMag@wrightsmedia.com**.

FA's 2022 RIA RANKING

Commonwealth



RAYMOND JAMES

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2021 (\$MM)	NON-DISCRETIONARY ASSETS 2021 (\$MM)	YEAR END 2021 ASSETS (\$MM)*
507	Valpey Financial Planning	Concord, N.H.	153.96	10.23	164.20
508	Smith Bruer Advisors	Tallahassee, Fla.	100.47	58.13	158.60
509	Equita Financial Network	Fort Washington, Pa.	150.86	5.07	155.93
ASSET CATEGORY: \$50 MILLION TO <\$150 MILLION					
510	Paragon Wealth Management	Provo, Utah	144.86	4.55	149.41
511	Flagship Capital Management	Media, Pa.	148.00	0.00	148.00
512	Elderado Financial	Montrose, Colo.	147.95	0.00	147.95
513	Macke Financial Advisory Group	Fort Myers, Fla.	140.00	0.00	140.00
514	Define Financial	San Diego, Calif.	139.72	0.00	139.72
515	Ivy League Financial Advisors	Rockville, Md.	134.47	0.00	134.47
516	Focus Financial Advisors	Rockford, Ill.	130.06	0.00	130.06
517	Waverley Wealth Management	Mountain View, Calif.	117.15	2.53	119.68
518	Steward Advisors	Chicago, Ill.	114.85	3.88	118.73
519	Timmons Wealth Management	Attleboro, Mass.	100.08	0.00	100.08
520	First and Main Financial	Piedmont, Calif.	94.70	0.00	94.70
521	Townsend Financial Planning	Mount Sterling, Ky.	81.10	12.03	93.13
522	Chilmark Financial Advisors	Miami, Fla.	89.42	0.00	89.42
523	Meritas Advisors	San Rafael, Calif.	42.99	34.86	77.85
524	Graf Financial	Baton Rouge, La.	75.48	0.74	76.22
525	MTR Financial Services	Kingwood, Texas	73.72	0.00	73.72
526	Shriver Investments	Parker, Colo.	51.57	0.00	51.57
527	Ankerstar Wealth	Round Rock, Texas	38.48	6.32	44.81
528	Safe Harbor Asset Management	Huntington, N.Y.	43.30	0.00	43.30
529	DAIM Digital Asset Investment Management	Newport Beach, Calif.	26.56	6.34	32.90
530	Birch Investment Management	Brookings, S.D.	17.36	0.00	17.36
531	Venn Wealth & Benefit Services	Altoona, Pa.	16.42	0.04	16.46
532	Aurora Strategic Advisors	Lumberton, N.C.	12.70	3.50	16.20
533	Lindy S. Diamond, Personal Financial Services	San Marcos, Calif.	10.11	0.00	10.11
534	Atherean Wealth Management	Jersey City, N.J.	3.79	4.28	8.07

*Discretionary and nondiscretionary AUM can also be found on Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-adviser to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
 For reprints of this PDF please contact **Aaron Deyang** at **FAmag@wrightsmedia.com**.