

FINANCIAL ADVISOR

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SURVEY & RANKING 2019

Top 50 Fastest-Growing Firms

TOP 50 FASTEST-GROWING FIRMS*

With More
Than \$300 Million
In AUM

GROWTH RANK	FIRM NAME	LOCATION	2018 CLIENTS	YEAR END 2018 ASSETS (\$MM)	% GROWTH IN ASSETS 2017-2018	% GROWTH IN ASSETS PER CLIENT
1	The Mather Group	Chicago, Ill.	1,139	3,873.06	156.13%	101.71%
2	Cabana Asset Management	Fayetteville, Ark.	3,539	608.01	101.87%	63.94%
3	Cafaro Greenleaf	Red Bank, N.J.	400	4,300.00	86.96%	-29.89%
4	Per Stirling Capital Management	Austin, Texas	941	1,087.99	74.82%	36.92%
5	GM Advisory Group	Melville, N.Y.	414	1,415.46	72.35%	66.93%
6	Intelligence Driven Advisers	Carlsbad, Calif.	1,200	740.00	68.18%	19.13%
7	Camden Capital	El Segundo, Calif.	302	3,174.61	60.53%	44.05%
8	Miracle Mile Advisers	Los Angeles, Calif.	493	1,399.69	55.85%	3.06%
9	Madison Wealth Management	Cincinnati, Ohio	465	791.86	54.90%	2.60%
10	Axxcess Wealth Management	Carlsbad, Calif.	875	777.74	50.65%	11.91%
11	Raub Brock Capital Management	Larkspur, Calif.	3,063	1,912.82	50.04%	177.15%
12	Segall Bryant & Hamill	Chicago, Ill.	2,101	18,627.05	49.36%	52.56%
13	Argent Advisors	Ruston, La.	2,095	782.16	47.82%	1.11%
14	Lido Advisors	Los Angeles, Calif.	1,594	4,086.49	47.38%	-5.79%
15	Carson Wealth Management Group	Omaha, Neb.	2,000	7,502.98	46.93%	32.24%
16	Artemis Wealth Advisors	New York, N.Y.	13	1,198.97	42.73%	31.76%
17	Advanced Capital Group	Minneapolis, Minn.	256	22,774.70	39.18%	48.42%
18	Allworth Financial	Sacramento, Calif.	6,623	3,453.73	38.93%	-7.45%
19	Claro Advisors	Boston, Mass.	456	339.67	38.60%	11.55%
20	Glassman Wealth Services	Vienna, Va.	240	1,370.86	37.99%	26.49%
21	Rowling & Associates	San Diego, Calif.	295	340.89	37.98%	28.16%
22	Mariner Wealth Advisors	Overland Park, Kan.	15,813	22,043.09	37.22%	14.69%
23	Red Door Wealth Management	Memphis, Tenn.	301	481.03	37.07%	16.12%
24	Quadrant Capital Group	Cincinnati, Ohio	59	829.45	36.85%	27.57%
25	Virtue Capital Management	Brentwood, Tenn.	4,716	465.24	36.69%	102.51%
26	Sowell Management	North Little Rock, Ark.	4,319	1,960.64	35.89%	10.56%
27	Hardy Reed	Tupelo, Miss.	272	966.60	34.07%	14.35%
28	TrilogyCapital	Huntington Beach, Calif.	13,407	877.12	33.25%	-46.02%
29	Aldrich Wealth	Lake Oswego, Ore.	750	1,599.83	32.86%	25.77%
30	Altium Wealth Management	Purchase, N.Y.	796	1,202.94	31.99%	11.92%
31	Sikich Capital Management	Springfield, Ill.	1,223	386.89	29.87%	34.43%
32	Capital Wealth Planning	Naples, Fla.	2,766	1,211.45	28.89%	-6.66%
33	Parallel Advisors	San Francisco, Calif.	2,059	2,386.83	27.26%	17.24%
34	Strategic Wealth Partners Group	Deerfield, Ill.	654	2,083.80	26.91%	4.79%
35	Vivaldi Capital Management	Chicago, Ill.	600	1,525.59	26.85%	-4.86%
36	Private Ocean Wealth Management	San Rafael, Calif.	1,044	2,004.72	25.93%	-27.63%
37	EP Wealth Advisors	Torrance, Calif.	3,600	4,107.30	24.58%	-7.43%
38	Kingsview Asset Management	Grants Pass, Ore.	2,400	937.38	24.41%	8.86%
39	Meritas Wealth Management	Larkspur, Calif.	164	345.08	23.14%	29.90%
40	Conrad Siegel	Harrisburg, Pa.	255	5,178.36	23.10%	11.03%
41	Socius Family Office	Fort Lauderdale, Fla.	105	477.69	22.22%	17.57%
42	Reilly Financial Advisors	La Mesa, Calif.	1,000	1,334.42	21.86%	9.67%
43	Buckingham Strategic Wealth	St. Louis, Mo.	7,940	14,907.77	21.37%	-2.46%
44	TrustCore Financial Services	Brentwood, Tenn.	1,850	1,525.31	21.09%	14.54%
45	The Colony Group	Boston, Mass.	3,143	7,622.60	20.81%	-27.39%
46	Greenwich Wealth Management	Greenwich, Conn.	147	1,354.01	18.92%	13.26%
47	Acorn Financial Advisory Services	Reston, Va.	1,504	810.80	18.24%	6.13%
48	BT Wealth Management	Atlanta, Ga.	342	924.45	17.72%	-10.51%
49	Belpointe Asset Management	Phoenix, Ariz.	3,400	1,120.48	17.70%	2.36%
50	CIC Wealth	Rockville, Md.	559	402.22	17.16%	0.39%

* Only firms founded in 2015 or earlier are included.

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