

	RAYMOND JAMES
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2018 TAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2018 ASSETS (\$MM)*	% GROWTH IN ASSETS 2017-2018	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
SSET CATE	GORY: \$1 BILLION AND OVER						
1	CAPTRUST	Raleigh, N.C.	289,654.60	5.72%	\$43.51	-22.50%	36.41%
2	Edelman Financial Engines	Sunnyvale, Calif.	181,300.00	7.02%	\$0.17	16.74%	-8.32%
3	Fisher Investments	Camas, Wash.	94,107.84	-2.00%	\$1.63	-21.79%	25.30%
4	First Republic Investment Management	San Francisco, Calif.	78,291.03	5.75%	\$5.90	-12.13%	20.34%
5	Fort Washington Investment Advisors	Cincinnati, Ohio	52,421.78	-3.89%	\$79.43	-5.05%	1.23%
6	Creative Planning	Overland Park, Kan.	33,905.05	5.90%	\$1.08	-19.56%	31.64%
7	Advanced Capital Group	Minneapolis, Minn.	22,774.70	39.18%	\$88.96	48.42%	-6.23%
8	United Capital Financial Advisers	Newport Beach, Calif.	22,056.50	2.70%	\$1.08	4.11%	-1.35%
9	Mariner Wealth Advisors	Overland Park, Kan.	22,043.09	37.22%	\$1.39	14.69%	19.65%
10	Moneta	St. Louis, Mo.	20,257.47	9.42%	\$4.35	9.38%	0.04%
11	Silvercrest Asset Management Group	New York, N.Y.	19,032.24	-10.65%	\$26.88	-9.26%	-1.53%
12	Segall Bryant & Hamill	Chicago, III.	18,627.05	49.36%	\$8.87	52.56%	-2.10%
13	CIBC Private Wealth Management	Atlanta, Ga.	18,047.87	-3.66%	\$2.46	-10.40%	7.52%
14	BBR Partners	New York, N.Y.	15,900.00	11.98%	\$111.19	4.15%	7.52%
15	Veritable	•	•	-3.90%		-6.05%	2.28%
		Newtown Square, Pa.	15,021.77		\$67.06		
16	Buckingham Strategic Wealth	St. Louis, Mo.	14,907.77	21.37%	\$1.88	-2.46%	24.43%
17	Plante Moran Financial Advisors	Southfield, Mich.	14,337.30	0.09%	\$4.98	-0.47%	0.56%
18	Tiedemann Advisors	New York, N.Y.	13,920.63	13.16%	\$34.20	25.67%	-9.96%
19	DiMeo Schneider & Associates	Chicago, III.	13,840.10	3.76%	\$33.76	-2.31%	6.22%
20	1919 Investment Counsel	Baltimore, Md.	11,808.43	4.96%	\$7.68	-35.47%	62.65%
21	Aspiriant	Los Angeles, Calif.	11,669.98	-4.45%	\$6.97	-7.02%	2.76%
22	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	11,524.53	5.70%	\$15.96	5.85%	-0.14%
23	Brownson, Rehmus & Foxworth	Chicago, III.	10,892.86	-3.10%	\$21.92	-8.95%	6.42%
24	Advanced Research Investment Solutions (ARIS)	Beverly Hills, Calif.	10,827.94	-2.05%	\$183.52	-25.29%	31.11%
25	Johnson Investment Counsel	Cincinnati, Ohio	10,661.23	2.31%	\$2.97	-9.14%	12.60%
26	RMB Capital	Chicago, III.	8,632.00	4.93%	\$4.74	-3.13%	8.32%
27	Pathstone	Englewood, N.J.	8,534.38	-0.17%	\$26.26	-5.08%	5.18%
28	Signature Estate & Investment Advisors	Los Angeles, Calif.	8,410.52	7.50%	\$1.11	0.41%	7.06%
29	The Colony Group	Boston, Mass.	7,622.60	20.81%	\$2.43	-27.39%	66.38%
30	Evercore Wealth Management	New York, N.Y.	7,559.82	3.14%	\$12.60	3.14%	0.00%
31	Carson Wealth Management Group	Omaha, Neb.	7,502.98	46.93%	\$3.75	32.24%	11.11%
32	WE Family Offices	Miami, Fla.	7,402.70	0.33%	\$101.41	-3.79%	4.29%
33	myClO Wealth Partners	Philadelphia, Pa.	7,377.05	12.98%	\$10.08	-0.60%	13.66%
34	Gresham Partners	Chicago, III.	7,248.39	4.52%	\$71.06	0.42%	4.08%
35		-	6,507.70	-6.65%		-12.57%	
	Mason Investment Advisory Services	Reston, Va.			\$7.78		6.77%
36	Ballentine Partners	Waltham, Mass.	6,424.57	-4.09%	\$30.45	-10.91%	7.65%
37	Clarfeld Financial Advisors	Tarrytown, N.Y.	6,103.00	-2.35%	\$13.56	-11.03%	9.76%
38	GW & Wade	Wellesley, Mass.	5,928.19	-6.16%	\$2.46	-8.34%	2.38%
39	Athena Capital Advisors	Lincoln, Mass.	5,822.95	6.42%	\$138.64	8.95%	-2.33%
40	Cornerstone Advisors Asset Management	Bethlehem, Pa.	5,807.39	1.55%	\$12.44	0.46%	1.08%
41	RSM US Wealth Management	Minneapolis, Minn.	5,694.02	-4.93%	\$1.51	-1.96%	-3.03%
42	Mill Creek Capital Advisors	Conshohocken, Pa.	5,623.05	-3.02%	\$16.69	-7.33%	4.66%
43	Tolleson Private Wealth Management	Dallas, Texas	5,563.00	-0.75%	\$34.55	-2.60%	1.90%
44	AE Wealth Management	Topeka, Kan.	5,526.24	100.29%	\$0.14	-26.33%	171.89%
45	Beacon Pointe Advisors	Newport Beach, Calif.	5,505.87	-0.99%	\$4.27	-2.91%	1.98%
46	Homrich Berg	Atlanta, Ga.	5,457.26	-2.49%	\$2.66	-26.80%	33.20%
47	Ferguson Wellman Capital Management	Portland, Ore.	5,456.66	5.91%	\$6.52	0.97%	4.89%
48	Savant Capital	Rockford, III.	5,382.96	-3.66%	\$1.11	-12.24%	9.77%
49	Brighton Jones	Seattle, Wash.	5,299.27	6.81%	\$3.08	-7.89%	15.96%
	Conrad Siegel	Harrisburg, Pa.	5,178.36	23.10%	\$20.31	11.03%	10.87%
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50 51	CV Advisors	Aventura, Fla.	5,064.49	-9.71%	\$64.11	-8.56%	-1.25%

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2018 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2018 ASSETS (\$MM)*	% GROWTH IN ASSETS 2017-2018	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
53	Sontag Advisory	New York, N.Y.	4,994.19	-5.24%	\$3.83	-12.72%	8.57%
54	Monroe Vos Consulting Group	Houston, Texas	4,958.30	-7.52%	\$52.75	-7.52%	0.00%
55	Douglas C. Lane & Associates	New York, N.Y.	4,884.86	-8.31%	\$4.09	-11.76%	3.91%
56	Wetherby Asset Management	San Francisco, Calif.	4,851.93	3.64%	\$8.94	1.35%	2.26%
57	Freestone Capital Management	Seattle, Wash.	4,689.55	10.66%	\$2.69	2.15%	8.33%
58	Welch & Forbes	Boston, Mass.	4,589.19	-6.31%	\$6.01	-0.91%	-5.45%
59	MAI Capital Management	Cleveland, Ohio	4,460.01	-2.38%	\$4.61	-13.98%	13.48%
60	Altair Advisers	Chicago, III.	4,404.37	-2.74%	\$14.16	-3.99%	1.30%
61	Signature Family Wealth Advisors	Charlottesville, Va.	4,347.02	-1.31%	\$25.72	-4.23%	3.05%
62	Cafaro Greenleaf	Red Bank, N.J.	4,300.00	86.96%	\$10.75	-29.89%	166.67%
63	Litman Gregory Asset Management	Walnut Creek, Calif.	4,269.82	-14.68%	\$11.21	-20.06%	6.72%
64	Ropes Wealth Advisors	Boston, Mass.	4,260.36	10.80%	\$3.86	4.37%	6.15%
65	Gofen And Glossberg	Chicago, III.	4,186.89	-4.30%	\$4.57	-6.07%	1.89%
66	Finaccess Advisors	Miami, Fla.	4,185.91	-4.63%	\$50.43	-20.71%	20.29%
67	Heck Capital Advisors	Rhinelander, Wis.	4,161.58	-2.01%	\$4.69	-17.90%	19.35%
68	Money Matters with Ken Moraif	Plano, Texas	4,147.39	0.21%	\$0.48	-10.10%	11.46%
69	Joel Isaacson & Co.	New York, N.Y.	4,137.42	7.28%	\$3.76	-9.40%	18.41%
70	Northside Capital Management	Hood River, Ore.	4,124.34	-17.93%	\$152.75	-14.89%	-3.57%
71	EP Wealth Advisors	Torrance, Calif.	4,107.30	24.58%	\$1.14	-7.43%	34.58%
72	Beaumont Financial Partners	Needham, Mass.	4,094.00	-1.09%	\$2.05	-6.03%	5.26%
73	Lido Advisors	Los Angeles, Calif.	4,086.49	47.38%	\$2.56	-5.79%	56.43%
74	BIOIS	San Francisco, Calif.	4,056.83	-8.51%	\$4.45	-8.00%	-0.55%
75	Alesco Advisors	Pittsford, N.Y.	4,041.87	4.87%	\$8.98	-2.12%	7.149
76	R. M. Davis	Portland, Maine	3,938.59	-1.74%	\$2.56	-9.16%	8.16%
77	Sequoia Financial Group	Akron, Ohio	3,903.14	0.01%	\$1.03	-40.39%	67.77%
78	The Mather Group	Chicago, III.	3,873.06	156.13%	\$3.40	101.71%	26.98%
79	Balasa Dinverno Foltz	Itasca, III.	3,864.05	-3.26%	\$2.79	-8.01%	5.17%
80	RGT Wealth Advisors	Dallas, Texas	3,857.12	-4.22%	\$6.81	-7.94%	4.04%
81	Dowling & Yahnke	San Diego, Calif.	3,829.23	-3.26%	\$3.19	-7.93%	5.08%
82	Ingalls & Snyder	New York, N.Y.	3,791.56	10.07%	\$0.94	-30.04%	57.34%
83	Valeo Financial Advisors	Indianapolis, Ind.	3,750.48	12.13%	\$2.50	-2.82%	15.38%
84	WMS Partners	Towson, Md.	3,679.84	-10.96%	\$9.46	-15.54%	5.42%
85	Plancorp	St. Louis, Mo.	3,661.61	-8.70%	\$2.97	-13.37%	5.39%
86	CLA Wealth Advisors	Minneapolis, Minn.	3,616.02	0.00%	\$0.79	-15.22%	17.95%
87	RegentAtlantic	Morristown, N.J.	3,597.79	-1.97%	\$2.44	-13.49%	13.31%
88	Lourd Capital	Beverly Hills, Calif.	3,573.95	-0.31%	\$7.05	0.87%	-1.17%
89	Sullivan, Bruyette, Speros & Blayney	McLean, Va.	3,518.35	1.34%	\$3.36	-4.27%	5.86%
90	Greenspring Advisors	Towson, Md.	3,505.28	8.58%	\$7.67	-3.07%	12.01%
91	SignatureFD	Atlanta, Ga.	3,494.18	14.15%	\$3.11	0.74%	13.31%
92	Allworth Financial	Sacremento, Calif.	3,453.73	38.93%	\$0.52	-7.45%	50.11%
93	HBKS Wealth Advisors	Erie, Pa.	3,448.04	8.55%	\$0.69	0.23%	8.30%
94	Bradley, Foster & Sargent	Hartford, Conn.	3,440.59	-4.07%	\$2.44	-6.73%	2.85%
95	Cornerstone Advisors	Bellevue, Wash.	3,400.00	-8.11%	\$5.23	-8.11%	0.00%
96	South Texas Money Management	San Antonio, Texas	3,385.23	2.09%	\$1.79	-1.59%	3.73%
97	Coldstream Wealth Management	Bellevue, Wash.	3,348.19	2.26%	\$2.52	-5.66%	8.39%
98	Brightworth	Atlanta, Ga.	3,335.52	0.03%	\$2.57	9.96%	-9.03%
99	Forum Financial Management	Lombard, III.	3,262.67	0.15%	\$1.00	2.71%	-2.49%
100	Pension Consultants	Springfield, Mo.	3,255.95	-4.70%	\$35.39	-6.78%	2.229
101	Forbes Family Trust	New York, N.Y.	3,230.00	-4.33%	\$30.76	-36.22%	50.00%
102	Camden Capital	El Segundo, Calif.	3,174.61	60.53%	\$10.51	44.05%	11.449
103	Honkamp Krueger Financial Services	Dubuque, Iowa	3,160.64	4.58%	\$0.83	3.01%	1.52%
104	Geller Advisors	New York, N.Y.	3,144.39	12.68%	\$66.90	-16.09%	34.29%
105	Wipfli Financial Advisors	Milwaukee, Wis.	3,043.91	-37.41%	\$1.68	-32.00%	-7.97%

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

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106	Massey Quick Simon	Morristown, N.J.	2,975.55	-1.72%	\$9.79	-12.71%	12.59%
107	Crescent Grove Advisors	Lake Forest, III.	2,889.27	11.78%	\$14.74	-5.33%	18.07%
108	Wilbanks Smith & Thomas Asset Management	Norfolk, Va.	2,848.66	-3.77%	\$1.50	21.40%	-20.73%
109	Clifford Swan Investment Counselors	Pasadena, Calif.	2,776.00	-4.90%	\$3.58	-7.23%	2.51%
110	TFO Phoenix	Phoenix, Ariz.	2,771.25	15.21%	\$18.47	2.92%	11.94%
111	LAMCO Advisory Services	Lake Mary, Fla.	2,743.36	12.34%	\$12.03	-5.89%	19.37%
112	Truepoint Wealth Counsel	Cincinnati, Ohio	2,731.50	-2.69%	\$2.66	-27.99%	35.13%
113	JMG Financial Group	Downers Grove, III.	2,675.00	3.76%	\$3.12	-10.39%	15.79%
114	Badgley Phelps Wealth Managers	Seattle, Wash.	2,636.48	5.89%	\$5.09	-2.49%	8.60%
115	Westmount Asset Management	Los Angeles, Calif.	2,636.40	5.63%	\$2.23	2.59%	2.96%
116	Telemus Capital	Southfield, Mich.	2,590.06	-6.99%	\$1.69	-27.05%	27.50%
117	Prio Wealth	Boston, Mass.	2,560.19	-7.91%	\$4.03	-5.01%	-3.05%
118	Covington Capital Management	Los Angeles, Calif.	2,556.75	7.96%	\$4.39	-26.17%	46.23%
119	RAA	Addison, Texas	2,556.23	-4.52%	\$0.80	-8.29%	4.11%
120	Allegheny Financial Group	Pittsburgh, Pa.	2,536.04	-13.53%	\$0.69	-52.37%	81.55%
121	Budros, Ruhlin and Roe	Columbus, Ohio	2,527.74	1.20%	\$3.47	1.34%	-0.14%
122	Frontier Investment Management Co.	Dallas, Texas	2,527.23	8.76%	\$1.63	-1.72%	10.66%
123	Advance Capital Management	Southfield, Mich.	2,512.17	-3.60%	\$0.45	-8.35%	5.19%
124	Fort Pitt Capital Group	Pittsburgh, Pa.	2,473.34	-1.30%	\$1.12	-6.73%	5.82%
125	TCI Wealth Advisors	Tucson, Ariz.	2,464.23	-5.35%	\$1.14	-9.06%	4.08%
126	Carroll Financial Associates	Charlotte, N.C.	2,463.90	-0.52%	\$0.48	-15.92%	18.31%
127	Merriman Wealth Management	Seattle, Wash.	2,443.11	-9.36%	\$1.05	10.58%	-18.03%
128	Parsec Financial Management	Asheville, N.C.	2,442.31	-4.57%	\$1.47	-10.14%	6.19%
129	Matter Family Office	Saint Louis, Miss.	2,428.41	-5.82%	\$15.98	-0.24%	-5.59%
130	Wellesley Asset Management	Wellesley, Mass.	2,427.82	-12.13%	\$1.42	-12.23%	0.12%
131	Cassaday & Company	Mclean, Va.	2,398.35	1.17%	\$1.23	-3.09%	4.40%
132	Modera Wealth Management	Westwood, N.J.	2,391.44	0.22%	\$1.70	-8.39%	9.40%
133	Parallel Advisors	San Francisco, Calif.	2,386.83	27.26%	\$1.16	17.24%	8.54%
134	Grimes & Company	Westborough, Mass.	2,376.40	9.07%	\$0.96	-2.69%	12.09%
135	Brookstone Capital Management	Wheaton, III.	2,350.00	9.30%	\$0.14	6.09%	3.03%
136	Halbert Hargrove Global Advisors	Long Beach, Calif.	2,343.32	-7.13%	\$3.68	-10.20%	3.41%
137	SYM Financial Advisors	Winona Lake, Ind.	2,328.58	-3.51%	\$2.08	-6.78%	3.51%
138	Heritage Investors Management	Bethesda, Md.	2,321.73	-6.34%	\$3.46	-11.64%	6.00%
139	MRA Associates	Phoenix, Ariz.	2,319.43	-2.45%	\$3.35	-12.72%	11.77%
140	EMM Wealth	New York, N.Y.	2,314.81	-10.90%	\$17.54	-16.98%	7.32%
141	Spectrum Investment Advisors	Mequon, Wis.	2,314.47	4.99%	\$6.17	-4.81%	10.29%
142	Warren Averett Asset Management	Birmingham, Ala.	2,296.74	-8.35%	\$1.95	-11.31%	3.34%
143	Hamilton Capital	Columbus, Ohio	2,294.83	-4.01%	\$1.15	-9.44%	6.00%
144	Mainstay Capital Management	Grand Blanc, Mich.	2,268.98	-2.01%	\$0.62	-3.52%	1.56%
145	Kovack Advisors	Fort Lauderdale, Fla.	2,261.27	3.08%	\$0.30	30.27%	-20.87%
146	Destination Wealth Management	Walnut Creek, Calif.	2,249.19	-0.16%	\$1.33	-6.88%	7.22%
147	JFS Wealth Advisors	Hermitage, Pa.	2,205.58	-7.72%	\$1.10	-10.62%	3.24%
148	Evergreen Gavekal	Bellevue, Wash.	2,197.09	-4.33%	\$3.03	-10.02 <i>%</i>	-3.33%
	•						
149	Capital Directions	Atlanta, Ga.	2,187.38	-6.81%	\$1.68	-13.98%	8.33%
150	TFO-TDC	Maumee, Ohio	2,175.23	-8.42%	\$1.60	-10.92%	2.80%
151	ARGI	Louisville, Ky.	2,162.65	17.05%	\$0.66	6.93%	9.47%
152	Palladium Registered Investment Advisors	Norfolk, Va.	2,159.26	-3.79%	\$2.21	-9.70%	6.54%
153	Annex Wealth Management	Elm Grove, Wis.	2,136.43	16.90%	\$0.33	2.02%	14.589
154	Bordeaux Wealth Advisors	Menlo Park, Calif.	2,133.45	2.89%	\$17.35	-18.86%	26.80%
155	Advisors Capital Management	Ridgewood, N.J.	2,132.07	5.87%	\$0.42	-0.36%	6.25%
156	Pure Financial Advisors	San Diego, Calif.	2,128.53	4.36%	\$0.89	-9.92%	15.85%
157	Frontier Wealth Management	Kansas City, Mo.	2,113.81	2.97%	\$1.33	1.60%	1.34%

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159	Strategic Wealth Partners Group	Deerfield, III.	2,083.80	26.91%	\$3.19	4.79%	21.11%
160	Exencial Wealth Advisors	Oklahoma City, Okla.	2,055.17	-2.36%	\$2.10	-3.96%	1.66%
161	Private Ocean Wealth Management	San Rafael, Calif.	2,004.72	25.93%	\$1.92	-27.63%	74.00%
162	Wescott Financial Advisory Group	Philadelphia, Pa.	2,003.14	3.23%	\$4.11	-8.64%	12.99%
163	Johnson Sterling	Birmingham, Ala.	1,962.45	14.39%	\$5.45	13.75%	0.56%
164	Sowell Management	North Little Rock, Ark.	1,960.64	35.89%	\$0.45	10.56%	22.91%
165	Pinnacle Advisory Group	Columbia, Md.	1,954.30	-2.29%	\$1.58	-1.50%	-0.80%
166	Gradient Investments	Arden Hills, Minn.	1,953.79	2.67%	\$0.15	-12.76%	17.68%
167	Raub Brock Capital Management	Larkspur, Calif.	1,912.82	50.04%	\$0.62	177.15%	-45.86%
168	Capital Asset Advisory Services	Haslett, Mich.	1,901.00	17.64%	\$0.23	-27.26%	61.72%
169	Mission Wealth Management	Santa Barbara, Calif.	1,884.01	10.90%	\$1.93	-2.28%	13.49%
170	Accredited Investors Wealth Management	Edina, Minn.	1,869.38	-3.48%	\$3.84	-9.23%	6.33%
171	SJS Investment Services	Sylvania, Ohio	1,867.60	-5.29%	\$2.57	-13.64%	9.67%
172	Andersen Tax	McLean, Va.	1,865.08	-11.90%	\$5.67	-19.39%	9.30%
173	Water Oak Advisors	Winter Park, Fla.	1,855.45	-5.86%	\$2.94	-7.50%	1.77%
174	Sage Financial Group	Conshohocken, Pa.	1,840.00	8.24%	\$2.83	-0.09%	8.33%
175	Carnegie Investment Counsel	Pepper Pike, Ohio	1,838.01	8.90%	\$1.67	-15.85%	29.41%
176	Fairview Capital Investment Management	Greenbrae, Calif.	1,827.54	-8.28%	\$10.38	-8.80%	0.57%
177	RINET Company	Boston, Mass.	1,823.15	-7.77%	\$10.13	-10.33%	2.86%
178	Welch Hornsby	Montgomery, Ala.	1,817.96	-5.77%	\$3.91	-10.63%	5.44%
179	Crestwood Advisors Group	Boston, Mass.	1,807.61	-1.32%	\$4.72	-6.98%	6.09%
180	PagnatoKarp	Reston, Va.	1,801.50	0.74%	\$5.36	3.14%	-2.33%
181	Cardiff Park Advisors	San Marcos, Calif.	1,799.90	3.37%	\$4.65	3.37%	0.00%
182	Family Management Corporation	New York, N.Y.	1,782.20	0.63%	\$2.76	-12.92%	15.56%
183	Carlson Capital Management	Northfield, Minn.	1,778.50	-8.18%	\$1.79	-15.20%	8.28%
184	Klingman & Associates	New York, N.Y.	1,774.54	-0.87%	\$4.50	-15.21%	16.91%
185	Morton Capital Management	Calabasas, Calif.	1,762.40	-3.64%	\$1.85	-6.17%	2.70%
186	G.W. Henssler & Associates	Kennesaw, Ga.	1,758.38	-3.12%	\$1.61	-6.32%	3.41%
187	Resource Consulting Group	Orlando, Fla.	1,756.69	-4.38%	\$4.01	-9.62%	5.80%
188	F. L. Putnam Investment Management Company	Wellesley, Mass.	1,747.90	1.68%	\$3.04	-5.57%	7.68%
189	RCL Advisors	New York, N.Y.	1,736.37	4.38%	\$12.23	10.26%	-5.33%
190	Barrett Asset Management	New York, N.Y.	1,715.73	-5.39%	\$2.62	-6.11%	0.77%
191	Retirement Income Solutions	Ann Arbor, Mich.	1,713.23	-3.14%	\$1.43	-4.68%	1.61%
192	HoyleCohen	San Diego, Calif.	1,713.17	-0.87%	\$1.49	-3.37%	2.59%
193	Gratus Capital	Atlanta, Ga.	1,674.18	4.61%	\$2.84	-21.85%	33.86%
194	Brouwer and Janachowski	Mill Valley, Calif.	1,656.13	-0.40%	\$2.21	-4.92%	4.76%
195	Courier Capital	Buffalo, N.Y.	1,630.55	-3.23%	\$1.99	-4.41%	1.23%
196	Chesley, Taft & Associates	Chicago, III.	1,610.30	-8.55%	\$4.50	-3.18%	-5.54%
197	Anderson Financial Partners	Ponte Vedra, Fla.	1,610.00	-8.00%	\$38.33	-8.00%	0.00%
198	Radnor Financial Advisors	Wayne, Pa.	1,600.76	-5.84%	\$4.42	-9.74%	4.32%
199	Aldrich Wealth	Lake Oswego, Ore.	1,599.83	32.86%	\$2.13	25.77%	5.63%
200	Polaris Greystone Financial Group	San Rafael, Calif.	1,591.41	6.81%	\$1.00	3.58%	3.12%
201	Beirne Wealth Consulting Services	Shelton, Conn.	1,589.99	-30.72%	\$2.89	29.36%	-46.45%
202	Chicago Capital	Chicago, III.	1,587.67	31,653.36%	\$3.62	28,832.44%	9.75%
203	Burney Company	Reston, Va.	1,578.47	-10.59%	\$0.75	-19.11%	10.53%
204	Colorado Financial Management	Boulder, Colo.	1,569.96	8.25%	\$1.89	-3.11%	11.73%
205	Birch Hill Investment Advisors	Boston, Mass.	1,564.01	-1.21%	\$8.94	-10.81%	10.76%
206	Argent Wealth Management	Waltham, Mass.	1,560.98	-3.98%	\$3.74	-7.90%	4.25%
207	MCF Advisors	Covington, Ky.	1,551.19	0.13%	\$2.42	0.91%	-0.77%
208	Vivaldi Capital Management	Chicago, III.	1,525.59	26.85%	\$2.54	-4.86%	33.33%
209	TrustCore Financial Services	Brentwood, Tenn.	1,525.31	21.09%	\$0.82	14.54%	5.71%
210	Private Vista	Chicago, III.	1,523.93	-10.21%	\$1.48	-14.23%	4.69%
211	Goelzer Investment Management	Indianapolis, Ind.	1,521.45	-3.56%	\$3.10	-3.95%	0.41%

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2018 TAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2018 ASSETS (\$MM)*	% GROWTH IN ASSETS 2017-2018	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANG IN NO. OF CLIENT
212	Farr Miller & Washington	Washington, D.C.	1,509.94	1.79%	\$2.75	9.94%	-7.41%
213	Bridgewater Advisors	New York, N.Y.	1,500.71	5.14%	\$3.63	-3.26%	8.68%
214	RTD Financial	Philadelphia, Pa.	1,487.45	0.02%	\$2.46	-2.79%	2.89%
215	West Financial Services	McLean, Va.	1,481.94	6.86%	\$1.99	-12.62%	22.30%
216	Golub Group	San Mateo, Calif.	1,481.83	-6.62%	\$1.30	-7.52%	0.97%
217	6 Meridian	Wichita, Kan.	1,474.79	3.29%	\$2.14	-5.69%	9.52%
218	CM Wealth Advisors	Beachwood, Ohio	1,451.00	-15.98%	\$8.69	-14.98%	-1.189
219	Integrated Financial Group	Atlanta, Ga.	1,439.11	-23.99%	\$0.34	7.33%	-29.199
220	Financial Clarity	Mountain View, Calif.	1,437.58	-1.47%	\$47.92	1.82%	-3.23°
221	Cadinha & Co.	Honolulu, Hawaii	1,432.70	15.96%	\$2.24	13.42%	2.24
222	The Welch Group	Birmingham, Ala.	1,431.56	2.40%	\$1.43	-6.19%	9.15
223	Arlington Partners	Birmingham, Ala.	1,425.25	-8.51%	\$13.97	-10.30%	2.00
224	Schneider Downs Wealth Management Advisors	Pittsburgh, Pa.	1,425.08	3.28%	\$2.57	1.60%	1.65
225	Capstone Financial Advisors	Downers Grove, III.	1,421.20	3.69%	\$2.85	-2.97%	6.87
226	GM Advisory Group	Melville, N.Y.	1,415.46	72.35%	\$3.42	66.93%	3.24
227	Heritage Financial Services	Westwood, Mass.	1,411.60	-0.74%	\$1.52	-9.39%	9.55
228	Obermeyer Wood Investment Counsel	Aspen, Colo.	1,400.00	-13.42%	\$2.67	-15.07%	1.94
229	Miracle Mile Advisors	Los Angeles, Calif.	1,399.69	55.85%	\$2.84	3.06%	51.23
230	BerganKDV Wealth Management	Bloomington, Minn.	1,398.98	0.70%	\$1.60	3.34%	-2.56
231	One Capital Management	Westlake Village, Calif.	1,378.87	1.78%	\$0.53	10.30%	-7.72
232	Smith Salley & Associates	Greensboro, N.C.	1,377.89	2.26%	\$3.02	-13.89%	18.75
233	Fairway Wealth Management	Independence, Ohio	1,374.88	3.05%	\$6.25	-10.07%	14.58
234	Verdence Capital Advisors	Hunt Valley, Md.	1,374.84	-9.05%	\$1.48	-8.76%	-0.32
235	Northwest Asset Management	Mercer Island, Wash.	1,372.76	3.09%	\$0.71	-3.53%	6.86
236	Glassman Wealth Services	Vienna, Va.	1,370.86	37.99%	\$5.71	26.49%	9.09
237	Greenwich Wealth Management	Greenwich, Conn.	1,354.01	18.92%	\$9.21	13.26%	5.00
238	Reilly Financial Advisors	La Mesa, Calif.	1,334.42	21.86%	\$1.33	9.67%	11.11
239	TrueWealth Management	Atlanta, Ga.	1,333.08	-7.74%	\$2.36	-16.56%	10.57
240	SFMG Wealth Advisors	Plano, Texas	1,312.43	6.43%	\$2.09	3.22%	3.11
241	Foster & Motley	Cincinnati, Ohio	1,302.88	11.91%	\$2.18	3.50%	8.12
242	North American Management	Boston, Mass.	1,296.66	-14.67%	\$3.09	-7.16%	-8.10
243	Lucia Capital Group	San Diego, Calif.	1,290.08	-5.76%	\$0.31	-14.44%	10.15
244	Regal Investment Advisors	Kentwood, Mich.	1,277.83	4.51%	\$0.18	-5.99%	11.17
245	GHP Investment Advisors	Denver, Colo.	1,277.26	1.85%	\$1.60	-5.19%	7.42
246	Lenox Wealth Advisors	New York, N.Y.	1,276.22	13.87%	\$1.16	-16.46%	36.30
247	Guyasuta Investment Advisors	Pittsburgh, Pa.	1,242.59	-3.42%	\$3.53	-8.08%	5.07
248	EFS Advisors	Cambridge, Minn.	1,236.98	15.36%	\$0.07	-18.57%	41.67
249	Legacy Wealth Management	Memphis, Tenn.	1,225.20	-2.18%	\$1.21	-8.84%	7.31
250	Sadoff Investment Management	Milwaukee, Wis.	1,221.00	-11.73%	\$1.90	-12.00%	0.31
251	Capital Wealth Planning	Naples, Fla.	1,211.45	28.89%	\$0.44	-6.66%	38.09
252	Windsor Wealth Management	Indianapolis, Ind.	1,210.68	1.48%	\$1.49	-9.52%	12.15
253	Altfest Personal Wealth Management	New York, N.Y.	1,210.00	-10.13%	\$1.95	-10.13%	0.00
254	Huber Financial Advisors	Lincolnshire, III.	1,203.50	-2.38%	\$1.20	-3.65%	1.31
255	Altium Wealth Management	Purchase, N.Y.	1,202.94	31.99%	\$1.51	11.92%	17.93
256	Financial Advisory Service	Leawood, Kan.	1,200.00	-2.44%	\$1.31	-6.29%	4.10
257	Artemis Wealth Advisors	New York, N.Y.	1,198.97	42.73%	\$92.23	31.76%	8.33
258	Compass Capital Management	Minneapolis, Minn.	1,158.95	27.38%	\$4.28	22.21%	4.23
259	CPS Investment Advisors	Lakeland, Fla.	1,155.09	4.63%	\$0.24	-8.95%	14.91
260	Resource Management	Metairie, La.	1,152.86	-6.43%	\$2.56	-12.67%	7.14
261	Alpha Cubed Investments	Irvine, Calif.	1,143.59	2.62%	\$0.83	-4.83%	7.13
262	Capital Wealth Advisors	Naples, Fla.	1,124.57	14.42%	\$1.36	0.18%	14.21
263	Belpointe Asset Management	Phoenix, Ariz.	1,120.48	17.70%	\$0.33	2.36%	14.98
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265	Vigilant Capital Management	Portsmouth, N.H.	1,087.18	4.47%	\$3.31	-10.82%	17.14%
266	Novare Capital Management	Charlotte, N.C.	1,085.00	2.36%	\$2.97	0.96%	1.39%
267	BigSur Wealth Management	Miami, Fla.	1,082.72	-6.26%	\$56.99	-6.26%	0.00%
268	True North Advisors	Dallas, Texas	1,081.54	-10.56%	\$2.38	-10.36%	-0.22%
269	Beaird Harris	Dallas, Texas	1,072.32	4.30%	\$1.84	-2.13%	6.57%
270	LBMC Investment Advisors	Brentwood, Tenn.	1,064.34	2.61%	\$2.85	-7.81%	11.319
271	CFS Investment Advisory Services	Totowa, N.J.	1,058.82	-0.67%	\$2.58	0.55%	-1.20%
272	Cornerstone Advisory	Hunt Valley, Md.	1,056.92	-3.09%	\$1.58	-6.85%	4.039
273	Ruggie Wealth Management	Tavares, Fla.	1,050.53	12.24%	\$2.71	5.28%	6.619
274	Durbin Bennett Private Wealth Management	Austin, Texas	1,044.97	0.40%	\$5.10	-4.50%	5.13
275	Abacus Planning Group	Columbia, S.C.	1,044.69	-1.10%	\$4.41	-4.43%	3.49
276	BLB&B Advisors	Montgomeryville, Pa.	1,039.83	-7.35%	\$1.23	-9.76%	2.679
277	CapTrust Financial Advisors	Holland, Mich.	1,031.55	4.11%	\$1.45	-3.05%	7.39
278	Willow Creek Wealth Management	Sebastopol, Calif.	1,022.94	13.20%	\$1.89	9.22%	3.659
279	Planning Alternatives	Bloomfield Hills, Mich.	1,017.11	-7.76%	\$1.25	-6.63%	-1.219
280	Round Table Wealth Management	Westfield, N.J.	1,012.16	-1.04%	\$5.22	-16.85%	19.02
281	McKinley Carter Wealth Services	Wheeling, W.Va.	1,003.83	-5.78%	\$1.12	-0.54%	-5.26
282	Magnus Financial Group	New York, N.Y.	1,001.01	256.53%	\$2.01	166.50%	33.78
	GORY: \$500 million to < \$1 billion	non rong mi	1,001.01	200.0070	Ψ2.01	100,0070	00.110
283	Bitterroot Capital Advisors	Bozeman, Mont.	996.01	-8.04%	\$66.40	-8.04%	0.00
284	Pillar Pacific Capital Management	San Marino, Calif.	980.63	-5.48%	\$2.60	-9.49%	4.43
285	Stegner Investment Associates	Louisville, Ky.	980.02	-2.41%	\$6.09	-9.08%	7.33
286	Albion Financial Group	Salt Lake City, Utah	978.58	-2.23%	\$1.50	-12.90%	12.24
287	Hardy Reed	Tupelo, Miss.	966.60	34.07%	\$3.55	14.35%	17.24
288	Lutz Financial	Omaha, Neb.	963.42	12.52%	\$1.75	-2.38%	15.27
289	Sigma Investment Counselors	Northville, Mich.	960.69	-0.80%	\$1.73	-1.91%	1.13
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	Condor Capital Management	Martinsville, N.J.	960.68	-4.50%	\$1.31	-5.93%	1.529
291	Tanglewood Total Wealth Management	Houston, Texas	953.32	-2.42%	\$2.03	-6.99%	4.91
292	Wealthquest	Cincinnati, Ohio	938.39	7.28%	\$0.82	-23.21%	39.71
293	Kingsview Asset Management	Grants Pass, Ore.	937.38	24.41%	\$0.39	8.86%	14.29
294	True Private Wealth Advisors	Salem, Ore.	935.96	3.11%	\$0.65	-6.36%	10.11
295	Van Hulzen Asset Management	El Dorado Hills, Calif.	933.36	15.19%	\$1.24	4.44%	10.29
296	The Institute for Wealth Management	Denver, Colo.	926.23	4.06%	\$0.25	0.42%	3.63
297	AJ Wealth	New York, N.Y.	926.00	-32.80%	\$4.65	-41.58%	15.03
298	BT Wealth Management	Atlanta, Ga.	924.45	17.72%	\$2.70	-10.51%	31.54
399	StraightLine Group	Troy, Mich.	922.48	-3.42%	\$0.33	-1.53%	-1.91
300	Main Street Research	Sausalito, Calif.	914.30	7.74%	\$1.56	-8.10%	17.23
301	Ironview Capital Management	King of Prussia, Pa.	914.03	13.97%	\$3.18	0.86%	12.99
302	AEPG Wealth Strategies	Warren, N.J.	912.81	2.47%	\$1.63	8.70%	-5.72
303	Sapient Private Wealth Management	Eugene, Ore.	907.17	-4.72%	\$1.69	-6.14%	1.51
304	TFC Financial Management	Boston, Mass.	904.39	-5.56%	\$2.58	-10.95%	6.06
305	Valley National Financial Advisors	Bethlehem, Pa.	897.17	3.77%	\$0.45	-3.43%	7.46
306	The Financial Advisory Group	Houston, Texas	877.86	2.48%	\$2.51	-3.38%	6.06
307	TrilogyCapital	Huntington Beach, Calif.	877.12	33.25%	\$0.07	-46.02%	146.86
308	United Asset Strategies	Garden City, N.Y.	872.97	-3.24%	\$1.02	-6.06%	3.00
309	Versant Capital Management	Phoenix, Ariz.	872.57	-4.04%	\$1.69	-28.77%	34.73
310	Delphi Private Advisors	San Diego, Calif.	860.90	-9.37%	\$4.70	-7.39%	-2.14
311	Romano Wealth Management	Evanston, III.	859.99	-4.86%	\$1.28	-8.81%	4.33
312	Palisade Asset Management	Minneapolis, Minn.	858.13	-10.76%	\$1.88	-15.25%	5.30
313	Doyle Wealth Management	St Petersburg, Fla.	853.32	0.87%	\$1.07	-9.13%	11.00
314	SAX Wealth Advisors	Clifton, N.J.	853.19	-4.71%	\$1.33	0.21%	-4.90
315	Schechter Investment Advisors	Birmingham, Mich.	850.69	2.28%	\$4.27	-10.57%	14.37
	Baltimore Washington Financial Advisors	Columbia, Md.	850.00	0.00%	\$1.00	-17.65%	21.43

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317	Meyer Capital Group	Marlton, N.J.	847.17	-6.24%	\$1.20	-5.84%	-0.42%
318	Sheaff Brock Investment Advisors	Indianapolis, Ind.	845.96	-18.85%	\$0.82	-14.36%	-5.24%
319	Endurance Wealth Management	Providence, R.I.	836.73	-6.51%	\$2.89	-9.74%	3.57%
320	Wacker Wealth Partners	San Luis Obispo, Calif.	830.92	-6.82%	\$1.35	-11.82%	5.67%
321	Quadrant Capital Group	Cincinnati, Ohio	829.45	36.85%	\$14.06	27.57%	7.27%
322	Austin Asset	Austin, Texas	824.00	-0.72%	\$2.22	-6.33%	5.98%
323	Column Capital	Indianapolis, Ind.	820.20	-2.71%	\$2.93	-12.09%	10.67%
324	The Advisory Group Of San Francisco	San Francisco, Calif.	818.65	-4.85%	\$4.99	-1.94%	-2.96%
325	Paragon Capital Management	Denver, Colo.	816.66	-0.59%	\$5.63	0.78%	-1.36%
326	Warwick Partners	Bryan, Texas	813.58	-4.28%	\$4.87	-0.85%	-3.47%
327	Acorn Financial Advisory Services	Reston, Va.	810.80	18.24%	\$0.54	6.13%	11.41%
328	Greene Wealth Management	Seattle, Wash.	806.04	2.22%	\$2.44	-7.08%	10.00%
329	RZH Advisors	Stamford, Conn.	797.00	-3.74%	\$3.32	-15.78%	14.29%
330	Delegate Advisors	Chapel Hill, N.C.	794.59	-55.06%	\$27.40	-55.06%	0.00%
331	Madison Wealth Management	Cincinnati, Ohio	791.86	54.90%	\$1.70	2.60%	50.97%
332	Kings Point Capital Management	Great Neck, N.Y.	789.15	-1.49%	\$4.20	-9.35%	8.67%
333	Oakwood Capital Management	Los Angeles, Calif.	783.59	-5.66%	\$1.91	-5.89%	0.24%
334	Argent Advisors	Ruston, La.	782.16	47.82%	\$0.37	1.11%	46.20%
335	Ensemble Capital Management	Burlingame, Calif.	780.85	8.68%	\$4.00	-17.51%	31.76%
336	Axxcess Wealth Management	Carlsbad, Calif.	777.74	50.65%	\$0.89	11.91%	34.62%
337	Carnick & Kubik Group	Denver, Colo.	775.43	-3.07%	\$1.44	-5.76%	2.86%
338	L&S Advisors	Los Angeles, Calif.	774.81	-3.75%	\$0.54	-15.91%	14.46%
339	Weatherly Asset Management	Del Mar, Calif.	769.82	3.41%	\$2.07	-0.49%	3.91%
340	Financial Synergies Wealth Advisors	Houston, Texas	768.63	10.48%	\$1.52	-1.94%	12.67%
341	SilverOak Wealth Management	Edina, Minn.	760.37	1.12%	\$2.63	-2.38%	3.58%
342	Northern Oak Wealth Management	Milwaukee, Wis.	758.43	-3.36%	\$2.08	-7.33%	4.29%
343	YorkBridge Wealth Partners	New York, N.Y.	757.01	-6.01%	\$3.10	-2.55%	-3.56%
344	Nadler Financial Group	Deerfield, III.	749.33	1.49%	\$1.00	-5.70%	7.63%
345	Bogart Wealth	McLean, Va.	748.14	5.60%	\$1.34	-10.11%	17.47%
346	Fund Direct Advisors	Greensboro, N.C.	745.00	10.37%	\$2.98	-33.78%	66.67%
347	Narwhal Capital Management	Marietta, Ga.	742.89	-3.15%	\$7.08	-34.51%	47.89%
348	SB Capital Management	Encino, Calif.	741.44	11.12%	\$2.90	5.05%	5.79%
349	Intelligence Driven Advisers	Carlsbad, Calif.	740.00	68.18%	\$0.62	19.13%	41.18%
350	Corrigan Financial	Middletown, R.I.	735.00	-5.77%	\$0.75	-8.37%	2.84%
351	WealthSource Partners	Arroyo Grande, Calif.	730.30	11.12%	\$0.47	-10.48%	24.14%
352	The Insight Group	Salt Lake City, Utah	727.35	3.10%	\$1.80	-0.72%	3.85%
353	Smith Anglin Financial	Dallas, Texas	722.23	5.80%	\$0.86	2.29%	3.43%
354	CJM Wealth Advisers	Fairfax, Va.	718.62	-1.94%	\$0.95	-4.02%	2.17%
355	Oakbridge Partners	Atlanta, Ga.	715.38	2.77%	\$1.66	-3.41%	6.40%
356	Woodmont Investment Counsel	Nashville, Tenn.	715.07	3.63%	\$2.38	-2.24%	6.01%
357	Aurum Wealth Management	Mayfield Village, Ohio	709.00	-0.73%	\$0.86	-12.16%	13.01%
358	Cable Hill Partners	Portland, Ore.	708.33	14.76%	\$1.23	-0.38%	15.20%
359	Hemington Wealth Management	Falls Church, Va.	706.48	-1.42%	\$1.64	-18.35%	20.73%
360	Cardan Capital Partners	Denver, Colo.	702.54	0.06%	\$2.21	-10.01%	11.19%
361	Steel Peak Wealth Management	Woodland Hills, Calif.	683.95	-18.79%	\$0.57	-18.99%	0.25%
362	Burton Enright Welch	Walnut Creek, Calif.	683.30	5.01%	\$1.69	5.53%	-0.49%
363	Raffa Wealth Management	Washington, D.C.	678.46	-0.81%	\$4.71	-6.32%	5.88%
364	The Planning Center	Moline, III.	676.45	1.14%	\$0.75	-8.89%	11.02%
365	Petersen Hastings Investment Management	Kennewick, Wash.	670.21	-2.91%	\$0.99	-8.22%	5.79%
366	Sanderson Wealth Management	Buffalo, N.Y.	666.73	-10.12%	\$2.74	-14.93%	5.65%
367	Retirement Investment Advisors	Oklahoma City, Okla.	665.23	-2.58%	\$0.56	-8.76%	6.77%
368	Yeske Buie	San Francisco, Calif.	663.57	-6.62%	\$2.51	-10.51%	4.35%
	REDW Wealth	Albuquerque, N.M.	662.12	-5.46%	\$1.90	-7.36%	2.05%

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#LUMA	RAYMOND JAMES

2018 OTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2018 ASSETS (\$MM)*	% GROWTH IN ASSETS 2017-2018	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
370	Aveo Capital Partners	Greenwood Village, Colo.	660.01	-1.05%	\$0.69	-1.26%	0.21%
371	Medley & Brown	Ridgeland, Miss.	651.00	-10.46%	\$1.25	-10.28%	-0.19%
372	WBH Advisory	Baltimore, Md.	637.86	-1.05%	\$1.22	-10.14%	10.13%
373	CRA Financial	Northfield, N.J.	633.63	-1.25%	\$1.10	-10.19%	9.96%
374	Redwood Wealth Management	Alpharetta, Ga.	631.85	-0.37%	\$1.03	0.28%	-0.65%
375	Deerfield Financial Advisors	Indianapolis, Ind.	629.05	-6.52%	\$1.95	-6.81%	0.31%
376	SPC Financial	Rockville, Md.	628.03	-18.27%	\$0.65	-19.20%	1.15%
377	Sunrise Advisors	Leawood, Kan.	620.81	7.41%	\$1.13	-14.70%	25.92%
378	Granite Investment Advisors	Concord, N.H.	620.03	-9.76%	\$1.53	-12.21%	2.79%
379	Delta Financial Group	Basking Ridge, N.J.	618.69	0.72%	\$1.03	-4.84%	5.84%
380	Hill Investment Group	St. Louis, Mo.	615.50	-3.68%	\$2.86	-17.57%	16.85%
381	The McGowan Group Asset Management	Dallas, Texas	614.92	-11.89%	\$0.65	-11.89%	0.00%
382	Azzad Asset Management	Falls Church, Va.	614.77	2.77%	\$0.61	-7.51%	11.11%
383	Tradition Capital Management	Summit, N.J.	611.60	-6.74%	\$2.15	-7.73%	1.06%
384	Traphagen Financial Group	Oradell, N.J.	610.17	5.10%	\$0.50	-2.87%	8.21%
385	American Financial Advisors	Marietta, Ga.	609.62	-5.57%	\$0.58	-18.55%	15.93%
386	Vintage Financial Services	Ann Arbor, Mich.	608.40	4.04%	\$1.16	-4.91%	9.41%
387	Cabana Asset Management	Fayetteville, Ark.	608.01	101.87%	\$0.17	63.94%	23.14%
388	Quadrant Private Wealth	Bethlehem, Pa.	606.91	-1.02%	\$1.59	1.57%	-2.55%
389	Vision Capital Management	Portland, Ore.	604.89	3.67%	\$1.56	-3.03%	6.91%
390	ACG Advisory Services	Midlothian, Va.	602.95	-7.00%	\$2.18	-11.36%	4.92%
391	Apella Capital	Glastonbury, Conn.	600.00	5.26%	\$0.40	-5.26%	11.11%
392	Cahaba Wealth Management	Atlanta, Ga.	593.05	2.19%	\$1.12	-10.37%	14.01%
393	Sather Financial Group	Victoria, Texas	586.15	-0.49%	\$1.58	-9.90%	10.45%
394	MG&A Wealth	Plantation, Fla.	583.70	2.00%	\$1.17	-8.20%	11.11%
395	PDS Planning	Columbus, Ohio	572.21	1.19%	\$1.07	-4.88%	6.37%
396	Stepp & Rothwell	Overland Park, Kan.	565.48	-11.24%	\$2.28	-11.95%	0.81%
397	Financial Advisory Corporation	Grand Rapids, Mich.	563.21	-3.33%	\$3.08	-6.50%	3.39%
398	Archford Capital Strategies	Swansea, III.	557.44	-19.81%	\$1.06	-23.15%	4.35%
399	Meridian Wealth Partners	Blue Bell, Pa.	555.73	-16.25%	\$1.01	-34.71%	28.27%
400	St. Clair Advisors	Mayfield Heights, Ohio	554.33	-2.85%	\$5.77	-17.02%	17.07%
401	Schaefer Financial Management	Centennial, Colo.	554.29	-8.44%	\$1.80	-8.14%	-0.32%
402	Stratford Consulting	Addison, Texas	552.32	-2.20%	\$3.27	-3.36%	1.20%
403	Evermay Wealth Management	Arlington, Va.	551.97	2.26%	\$1.64	-12.00%	16.21%
404	Seasons of Advice Wealth Management	New York, N.Y.	547.00	4.03%	\$0.80	-0.56%	4.62%
405	Moisand Fitzgerald Tamayo	Orlando, Fla.	543.38	-2.83%	\$0.98	-7.37%	4.91%
406	HTG Investment Advisors	New Canaan, Conn.	541.63	-1.25%	\$1.79	-9.10%	8.63%
407	Briaud Financial Advisors	College Station, Texas	539.70	2.16%	\$2.16	2.16%	0.00%
408	Blue Chip Partners	Farmington Hills, Mich.	537.02	10.20%	\$1.25	-4.47%	15.36%
409	Southern Financial Group	Birmingham, Ala.	535.55	-3.29%	\$0.28	3.49%	-6.55%
410	3D Asset Management	Hartford, Conn.	532.87	-7.67%	\$0.54	-13.25%	6.44%
411	Investec Advisory Group, LP	Houston, Texas	531.67	-6.08%	\$1.88	-11.72%	6.39%
412	New England Investment & Retirement Group	North Andover, Mass.	523.12	0.09%	\$0.70	-1.92%	2.05%
413	Mitchell Capital Management	Leawood, Kan.	519.40	-6.30%	\$0.97	-8.21%	2.09%
414	Financial Planning and Information Services	De Pere, Wis.	517.00	4.01%	\$0.55	-3.15%	7.39%
415	Alpha Fiduciary	Phoenix, Ariz.	511.15	-7.50%	\$3.96	1.11%	-8.51%
416	Pinkerton Retirement Specialists	Coeur D Alene, Idaho	510.39	13.85%	\$0.73	8.16%	5.26%
417	PJS Investment Management	Cedarburg, Wis.	509.04	-6.80%	\$1.74	-8.72%	2.10%
418	Richard P. Slaughter Associates	Austin, Texas	507.39	2.83%	\$1.23	-1.41%	4.30%
419	Willis Johnson & Associates	Houston, Texas	505.76	1.90%	\$1.59	-20.21%	27.71%
420	Blankinship & Foster	Solana Beach, Calif.	503.92	-4.70%	\$2.07	-3.92%	-0.81%
421	Northeast Financial Group	Tannersville, Pa.	503.75	10.70%	\$0.44	-15.45%	30.92%
	ARS Wealth Advisors	St. Petersburg, Fla.	503.11	-0.30%	\$1.14	-5.97%	6.02%

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#LUMA	RAYMOND JAMES

2018 OTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2018 ASSETS (\$MM)*	% GROWTH IN ASSETS 2017-2018	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANG IN NO. OF CLIENT
ASSET CATE	EGORY: \$300 million to <\$500 million						
423	Stratos Wealth Advisors	Beachwood, Ohio	494.63	NM	\$0.54	NM	NM
424	FJY Financial	Reston, Va.	493.26	-3.69%	\$1.44	-6.22%	2.70
425	The Wealth Collaborative	Westlake Village, Calif.	491.38	-3.79%	\$2.47	-12.01%	9.34
426	Starfire Investment Advisers	Southfield, Mich.	483.64	2.84%	\$1.57	0.84%	1.99
427	Red Door Wealth Management	Memphis, Tenn.	481.03	37.07%	\$1.60	16.12%	18.04
428	Socius Family Office	Fort Lauderdale, Fla.	477.69	22.22%	\$4.55	17.57%	3.96
429	Concentus Wealth Advisors	Berwyn, Pa.	477.68	-7.08%	\$2.09	-8.71%	1.78
430	Jackson Financial Management	Costa Mesa, Calif.	477.39	-2.55%	\$1.01	-5.65%	3.29
431	Roof Advisory Group	Harrisburg, Pa.	476.25	1.06%	\$2.11	-4.31%	5.61
432	Greenline Partners	New York, N.Y.	475.73	-5.69%	\$16.99	-5.69%	0.00
433	Porter White & Company	Birmingham, Ala.	474.44	-11.49%	\$4.61	-15.79%	5.10
434	Fairman Group Family Office	Berwyn, Pa.	471.45	-3.50%	\$4.14	-11.11%	8.57
435	Ellis Investment Partners	Berwyn, Pa.	470.93	-0.97%	\$0.84	-9.76%	9.75
436	The Arkansas Financial Group	Little Rock, Ark.	467.14	-2.03%	\$1.52	-5.53%	3.70
437	Financial Partners Capital Management	New York, N.Y.	466.15	-44.74%	\$1.86	-36.34%	-13.19
438	Virtue Capital Management	Brentwood, Tenn.	465.24	36.69%	\$0.10	102.51%	-32.50
439	Rappaport Reiches Capital Management	Skokie, III.	463.96	-0.54%	\$1.76	-3.93%	3.53
440	Patton Albertson Miller Group	Chattanooga, Tenn.	459.16	-8.47%	\$1.73	-4.32%	-4.33
441	CapSouth Wealth Management	Dothan, Ala.	455.36	-39.19%	\$1.34	-45.47%	11.51
442	Harris Financial Advisors	Torrance, Calif.	453.54	-4.57%	\$1.18	-7.31%	2.96
443	Optima Asset Management	Dallas, Texas	452.94	-11.86%	\$4.62	-32.55%	30.67
444	WorthPointe	San Diego, Calif.	451.38	-11.59%	\$0.96	-8.02%	-3.89
445	SkyOak Wealth	Las Vegas, Nev.	450.00	12.50%	\$1.13	-1.56%	14.29
446	J.P. King Advisors	Walnut Creek, Calif.	445.40	-2.09%	\$1.24	-6.46%	4.68
447	Total Wealth Planning	Blue Ash, Ohio	444.67	-7.78%	\$1.14	-13.71%	6.87
448	Janiczek Wealth Management	Denver, Colo.	443.45	-13.40%	\$2.36	-9.25%	-4.57
449	ClearRock Capital	Ketchum, Idaho	442.57	-2.87%	\$1.58	-1.48%	-1.4 ⁻
450	Ariston Services Group	San Diego, Calif.	437.09	1.54%	\$6.94	1.54%	0.00
451	Droms Strauss Wealth Management	St. Louis, Mo.	434.95	-6.11%	\$1.45	-6.11%	0.00
452	BlueSky Wealth Advisors	New Bern, N.C.	426.08	11.25%	\$1.52	6.10%	4.85
453	The L. Warner Companies	Timonium, Md.	421.18	-10.50%	\$1.42	-22.59%	15.63
454	KMH Wealth Management	Victoria, Texas	420.25	9.02%	\$1.01	6.65%	2.22
455	Summit Wealth Partners	Orlando, Fla.	412.53	-4.19%	\$0.88	-23.92%	25.94
456	Asset Management Group	Stamford, Conn.	410.60	-5.96%	\$1.59	-4.50%	-1.53
457	Halpern Financial	Ashburn, Va.	409.22	6.73%	\$1.86	1.39%	5.20
458	Frisch Financial Group	Melville, N.Y.	409.09	-8.20%	\$0.96	-2.81%	-5.56
459	CIC Wealth	Rockville, Md.	402.22	17.16%	\$0.72	0.39%	16.70
460	Bernhardt Wealth Management	McLean, Va.	398.91	-6.50%	\$1.43	-15.92%	11.20
461	Schiavi + Dattani	Wilmington, Del.	395.45	-2.13%	\$2.21	-12.52%	11.88
462	Demming Financial Services Corporation	Aurora, Ohio	394.11	-6.90%	\$0.49	-12.71%	6.67
463	White Oaks Wealth Advisors	Minneapolis, Minn.	393.39	-6.69%	\$1.46	-12.24%	6.32
464	Investmark Advisory Group	Shelton, Conn.	392.17	-29.84%	\$0.85	-31.67%	2.67
465	Sikich Capital Management	Springfield, III.	386.89	29.87%	\$0.32	34.43%	-3.40
466	Goodman Financial Corporation	Houston, Texas	386.29	-1.38%	\$1.62	-5.52%	4.39
	·						
467 468	Summit Wealth Strategies	Chesterfield, Mo.	385.58	8.01%	\$0.28 \$0.56	-2.78% -7.42%	11.10
	Vestory	Seattle, Wash.	381.24	-8.23% 0.25%	\$0.56	-7.42% 7.42%	-0.87
469	Klaas Financial Asset Advisors	Loves Park, III.	378.00	9.25%	\$0.39	7.43%	1.69
470	Waller Financial Planning Group	Columbus, Ohio	375.86	-6.71%	\$0.78	-9.03%	2.5
471	Financial Symmetry	Raleigh, N.C.	372.00	1.36%	\$0.79	-10.07%	12.7
472	Birchwood Financial Partners	Edina, Minn.	370.32	-0.87%	\$0.97	-2.18%	1.33
473	Efficient Wealth Management	The Woodlands, Texas	368.91	0.79%	\$1.97	-6.21%	7.47

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2018 Total Assets Rank	FIRM NAME	LOCATION	YEAR END 2018 ASSETS (\$MM)*	% GROWTH IN ASSETS 2017-2018	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
475	Financial Insights	Tacoma, Wash.	367.97	10.81%	\$0.54	-13.74%	28.46%
476	Indie Asset Partners	Indianapolis, Ind.	367.43	14.17%	\$1.51	-0.80%	15.09%
477	Marotta Wealth Management	Charlottesville, Va.	365.54	1.29%	\$1.29	-18.76%	24.67%
478	J. W. Coons Advisors	Columbus, Ohio	363.63	-6.05%	\$2.44	-5.42%	-0.67%
479	Level Financial Advisors	Amherst, N.Y.	348.33	-3.28%	\$0.58	-3.28%	0.00%
480	Jentner Wealth Management	Akron, Ohio	345.31	-6.74%	\$1.25	-11.47%	5.34%
481	Meritas Wealth Managment	Larkspur, Calif.	345.08	23.14%	\$2.10	29.90%	-5.20%
482	Woodward Financial Advisors	Chapel Hill, N.C.	344.42	3.08%	\$2.50	4.58%	-1.43%
483	William Mack & Associates	Troy, Mich.	341.65	-5.06%	\$0.67	-8.99%	4.31%
484	Rowling & Associates	San Diego, Calif.	340.89	37.98%	\$1.16	28.16%	7.66%
485	Claro Advisors	Boston, Mass.	339.67	38.60%	\$0.74	11.55%	24.25%
486	Elser Financial Planning	Indianapolis, Ind.	334.13	11.37%	\$1.90	-6.98%	19.73%
487	Altrius Capital Management	New Bern, N.C.	332.00	-4.60%	\$0.95	-8.69%	4.48%
488	Insight Wealth Partners	Plano, Texas	331.78	-24.04%	\$0.59	-35.78%	18.28%
489	Tobias Financial Advisors	Plantation, Fla.	331.00	1.85%	\$1.62	-11.13%	14.61%
490	First Ohio Planning	Columbus, Ohio	330.00	4.70%	\$1.03	1.43%	3.23%
491	Net Worth Advisory Group	Sandy, Utah	326.00	4.43%	\$0.79	-2.65%	7.27%
492	Grand Wealth Management	Grand Rapids, Mich.	325.92	8.41%	\$2.40	-10.72%	21.43%
493	Hochman Cole Investment Advisors	Deerfield, III.	322.96	-4.70%	\$1.76	-18.24%	16.56%
494	Integris Wealth Management	Monterey, Calif.	322.78	6.92%	\$1.96	-4.10%	11.49%
495	Financial Insight Center	Salt Lake City, Utah	317.82	13.77%	\$0.31	5.36%	7.98%
496	Hopwood Financial Services	Reston, Va.	316.48	2.79%	\$1.48	-11.14%	15.68%
497	Mark Sheptoff Financial Planning	Glastonbury, Conn.	315.55	10.72%	\$0.86	4.65%	5.80%
498	HFG Wealth Management	The Woodlands, Texas	314.70	10.36%	\$1.14	-7.70%	19.57%
499	Heron Wealth	New York, N.Y.	314.16	0.58%	\$2.05	-9.28%	10.87%
500	Apex Financial Advisors	Yardley, Pa.	311.10	16.17%	\$4.15	8.43%	7.14%
501	Cedar Rowe Partners	Atlanta, Ga.	309.17	-13.10%	\$2.81	-5.99%	-7.56%
502	Next Generation Wealth Management	Milwaukee, Wis.	307.34	8.92%	\$1.07	-1.33%	10.38%
503	Point View Wealth Management	Summit, N.J.	306.78	-7.70%	\$1.84	-11.57%	4.38%
504	Wealth Care	Merritt Island, Fla.	306.00	-8.38%	\$2.11	-16.60%	9.85%
505	Align Wealth Management	Oklahoma City, Okla.	305.40	3.32%	\$1.49	-6.76%	10.81%
506	Gradient Capital Advisors	San Diego, Calif.	301.13	0.18%	\$0.74	-3.02%	3.30%
507	Clune & Associates	Chicago, III.	300.58	-7.08%	\$1.89	-13.51%	7.43%
ASSET CAT	EGORY: \$150 million to <\$300 million						
508	WJ Interests	Sugar Land, Texas	299.00	-8.56%	\$1.40	-10.27%	1.90%
509	Regency Wealth Management	Ramsey, N.J.	296.80	15.87%	\$1.54	13.47%	2.12%
510	Century Wealth Management	Memphis, Tenn.	296.63	10.02%	\$5.20	-1.56%	11.76%
511	Andrews, Lucia Wealth Management	Danville, Calif.	294.17	-2.75%	\$1.82	-4.55%	1.89%
512	Court Place Advisors	West Friendship, Md.	292.91	-6.09%	\$0.90	-8.98%	3.17%
513	W.A. Smith Financial Group	Sandusky, Ohio	290.92	33.50%	\$0.27	20.19%	11.08%
514	Monument Wealth Management	Alexandria, Va.	290.68	5.14%	\$1.54	1.80%	3.28%
515	Pinnacle Financial Group	Western Springs, III.	284.91	-2.08%	\$0.92	-3.35%	1.31%
516	Wechter Feldman Wealth Management	Parsippany, N.J.	274.66	-6.78%	\$1.78	-6.78%	0.00%
517	WFA Wealth Managers	San Diego, Calif.	272.71	-7.01%	\$0.84	-11.58%	5.18%
518	W. H. Financial	Appleton, Wis.	272.64	-7.62%	\$0.34	-8.55%	1.02%
519	PARAGON Wealth Strategies	Jacksonville, Fla.	271.55	19.89%	\$1.06	2.09%	17.43%
520	Resolute Financial	Newburyport, Mass.	269.71	5.26%	\$0.89	-0.32%	5.59%
521	CTS Financial Group	Chicago, III.	264.17	11.94%	\$0.75	8.74%	2.94%
522	Asset Planning	Cypress, Calif.	263.51	0.23%	\$0.88	-1.45%	1.71%
523	Palisade Investments	Stateline, Nev.	263.08	4.03%	\$0.75	-10.45%	16.17%
524	Transitions Wealth Management	Greenwood Village, Colo.	255.79	-2.62%	\$0.70	-8.76%	6.73%
		3-,					
525	Allodium Investment Consultants	Minneapolis, Minn.	255.49	0.86%	\$1.26	-14.54%	18.02%

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2018 OTAL ASSET RANK	S FIRM NAME	LOCATION	YEAR END 2018 ASSETS (\$MM)*	% GROWTH IN ASSETS 2017-2018	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
527	Day & Ennis	Macon, Ga.	249.75	4.47%	\$1.25	-0.75%	5.26%
528	Carolina Wealth Management	Greenville, N.C.	248.47	-4.57%	\$0.59	-9.11%	5.00%
529	Cascade Investment Group	Colorado Springs, Colo.	247.02	-14.58%	\$0.82	-21.70%	9.09%
530	Arista Wealth Management	Las Vegas, Nev.	246.82	-53.24%	\$0.96	6.66%	-56.16%
531	Cassady Schiller Wealth Management	Cincinnati, Ohio	243.63	19.07%	\$1.05	-2.48%	22.11%
532	Manske Wealth Management	Houston, Texas	243.00	14.62%	\$0.88	3.82%	10.40%
533	QP Consulting	Takoma Park, Md.	241.82	-3.10%	\$5.04	-9.16%	6.67%
534	LJI Wealth Management	Indianapolis, Ind.	240.00	17.07%	\$0.96	7.71%	8.70%
535	Interactive Financial Advisors	Chicago, III.	238.56	12.53%	\$0.08	0.38%	12.10%
536	Horizon Wealth Advisors	Houston, Texas	236.60	1.50%	\$1.92	-3.45%	5.13%
537	Anthony Smith Advisors	Atlanta, Ga.	234.44	6.54%	\$1.37	-9.66%	17.93%
538	Wakefield Wealth Management	Englewood, Colo.	233.28	-4.48%	\$1.53	-4.48%	0.00%
539	Navigoe	Redondo Beach, Calif.	232.20	-8.29%	\$1.86	-11.96%	4.17%
540	Fortune Wealth Management	Dallas, Texas	232.08	2.56%	\$1.12	-2.89%	5.61%
541	Searcy Financial Services	Overland Park, Kan.	230.06	-6.18%	\$1.31	-14.76%	10.06%
542	Fi3 Financial Advisors	Indianapolis, Ind.	229.09	53.69%	\$3.14	30.53%	17.74%
543	Poehling Capital Management	Madison, Wis.	228.57	-17.84%	\$0.63	-15.59%	-2.67%
544	Arbor Wealth Management	Miramar Beach, Fla.	226.21	3.84%	\$0.78	-7.61%	12.40%
545	Ballast		225.43	4.93%	\$0.78	19.15%	-11.94%
		Lexington, Ky.					4.20%
546	Smedley Financial Services	Salt Lake City, Utah	224.60	12.14%	\$0.26	7.62%	
547	Wilsey Asset Management	San Diego, Calif.	224.50	8.54%	\$0.33	1.00%	7.47%
548	Alpha Financial Advisors	Charlotte, N.C.	223.08	8.39%	\$1.14	0.65%	7.69%
549	Perspective Wealth Partners	Boise, Idaho	223.07	4.78%	\$1.72	-4.09%	9.24%
550	Premia Global Advisors	Coral Gables, Fla.	218.00	3.37%	\$4.84	-8.12%	12.50%
551	RMR Wealth Advisors	Madison, Wis.	217.72	-1.74%	\$1.45	-8.29%	7.14%
552	Slayton Lewis	Salt Lake City, Utah	217.69	11.63%	\$3.75	7.78%	3.57%
553	Integrated Wealth Management	Scottsdale, Ariz.	217.30	8.11%	\$0.38	1.34%	6.68%
554	Trinity Financial Advisors	Columbus, Ohio	214.89	2.85%	\$1.94	-6.42%	9.90%
555	MFA Wealth	Pittsburgh, Pa.	212.80	-1.39%	\$0.49	-6.86%	5.87%
556	Morling Financial Advisors	San Francisco, Calif.	212.60	6.48%	\$0.90	-1.19%	7.76%
557	Camarda Wealth Advisory Group	Fleming Island, Fla.	211.34	-0.70%	\$0.50	-5.85%	5.47%
558	The Doman Group	New York, N.Y.	211.00	27.11%	\$3.40	29.16%	-1.59%
559	Castleview Wealth Advisors	Oklahoma City, Okla.	209.00	81.74%	\$1.39	22.37%	48.51%
560	DeGreen Capital Management	Scottsdale, Ariz.	207.40	-8.55%	\$0.77	-19.77%	13.98%
561	Asset Planning Corporation	Knoxville, Tenn.	204.99	-2.96%	\$1.05	-7.42%	4.81%
562	Financial Alternatives	La Jolla, Calif.	204.78	2.23%	\$1.69	-4.53%	7.08%
563	Baron Financial Group	Fair Lawn, N.J.	203.42	-12.12%	\$0.75	-12.77%	0.74%
564	Spotlight Asset Group	Oakbrook Terrace, III.	202.85	105.56%	\$1.08	-65.01%	487.50%
565	Mullooly Asset Management	Wall, N.J.	199.48	3.10%	\$0.29	-0.16%	3.26%
566	Altruist Financial Advisors	Holland, Mich.	198.29	-10.32%	\$6.84	-10.32%	0.00%
567	NCM Capital Management	Ramsey, N.J.	196.29				14.29%
		· · · · · · · · · · · · · · · · · · ·		2.62%	\$1.63	-10.21%	
568	Investment Advisory Professionals	Boca Raton, Fla.	195.00	-7.45%	\$1.86	-11.86%	5.00%
569	Berno Financial Management	Cincinnati, Ohio	194.30	-6.90%	\$1.63	-10.03%	3.48%
570	Zuraw Financial Advisors	Greensboro, N.C.	193.77	1.88%	\$1.17	-6.14%	8.55%
571	Capital Investment Advisors	Washington, D.C.	188.86	65.25%	\$0.44	47.27%	12.21%
572	Legacy Consulting Group	Plano, Texas	188.59	3.97%	\$1.50	-0.98%	5.00%
573	Empyrion Wealth Management	Roseville, Calif.	188.42	24.11%	\$2.36	21.01%	2.56%
574	Sard Wealth Management Group	Atlanta, Ga.	186.95	16.91%	\$0.87	8.25%	8.00%
575	JVL Associates	Wyoming, Mich.	186.22	14.24%	\$4.14	4.09%	9.76%
576	Marrs Wealth Management	Ames, Iowa	186.20	8.15%	\$0.65	-2.36%	10.77%
577	Trinity Financial Advisors	Chicago, III.	185.90	-11.29%	\$2.86	-14.02%	3.17%
578	Fiduciary Wealth Management	Alexandria, Va.	185.53	4.52%	\$0.83	-6.73%	12.06%
579	Tull Financial Group	Chesapeake, Va.	183.57	-4.56%	\$0.78	-5.77%	1.29%

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2018 OTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2018 ASSETS (\$MM)*	% GROWTH IN ASSETS 2017-2018	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
580	Precipio Wealth Management	McLean, Va.	183.43	-8.41%	\$1.83	-8.41%	0.00%
581	Ledge Wealth Management	Sartell, Minn.	183.34	0.58%	\$0.78	-7.59%	8.84%
582	Life Planning Partners	Jacksonville, Fla.	179.76	4.92%	\$1.91	2.69%	2.17%
583	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	177.22	-1.34%	\$0.60	-6.06%	5.02%
584	Miller Advisors	Kirkland, Wash.	176.35	-6.75%	\$0.79	-15.91%	10.89%
585	Hurley Financial Group	Corvallis, Ore.	176.00	-6.38%	\$0.45	0.58%	-6.92%
586	TL Private Wealth	Southlake, Texas	175.75	19.44%	\$1.10	-8.18%	30.08%
587	Harbor Financial Group	Boulder, Colo.	172.97	-3.23%	\$1.18	-12.44%	10.53%
588	Wealthview Capital	Jackson, Miss.	170.77	4.77%	\$1.00	-1.40%	6.25%
589	Stegent Equity Advisors	Houston, Texas	170.47	-9.07%	\$2.01	-16.56%	8.97%
590	KCS Wealth Advisory	Los Angeles, Calif.	169.77	25.77%	\$0.87	12.87%	11.43%
591	WealthCrest Financial Services	Springfield, Va.	168.64	32.86%	\$1.05	7.94%	23.08%
592	Barnett Financial	Austin, Texas	168.39	5.66%	\$2.28	-2.91%	8.82%
593	Fidato Wealth	Middleburg Heights, Ohio	166.86	0.71%	\$0.67	17.76%	-14.48%
594	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	166.44	17.31%	\$1.10	8.77%	7.86%
595	The Putney Financial Group	San Rafael, Calif.	165.55	-3.50%	\$0.62	-8.96%	6.00%
596	Cornerstone Financial Planning	Newington, N.H.	165.48	-5.70%	\$1.02	-5.70%	0.00%
597	Samalin Investment Counsel	Chappaqua, N.Y.	164.82	-3.16%	\$0.75	-2.28%	-0.90%
598	Blue Ocean Strategic Capital	Syracuse, N.Y.	164.00	-3.53%	\$0.41	-7.15%	3.90%
599	Hilton Head Financial Advisors	Hilton Head, S.C.	163.48	-5.31%	\$1.05	-13.20%	9.09%
600	O'Keefe Stevens Advisory	Rochester, N.Y.	160.86	-8.49%	\$0.80	-15.36%	8.11%
601	Foresight Capital Management Advisors	Saline, Mich.	158.18	3.62%	\$0.49	-2.75%	6.56%
602	Robert Gordon & Associates	Springfield, III.	157.60	-2.11%	\$0.25	-11.00%	9.98%
603	Bonner & Smith	Lubbock, Texas	156.11	3.45%	\$0.68	-1.54%	5.07%
604	Access Investment Advisors	Manitowoc, Wis.	155.40	4.69%	\$0.92	5.93%	-1.17%
605	Briggs Wealth Management	Glastonbury, Conn.	154.39	14.33%	\$1.50	12.11%	1.98%
606	Sharper & Granite	El Segundo, Calif.	152.33	0.72%	\$1.66	-5.85%	6.98%
ASSET CATI	EGORY: \$100 million to <\$150 million						
607	Longview Financial Advisors	Huntsville, Ala.	149.38	-6.57%	\$0.82	-8.11%	1.67%
608	Centerline Wealth Advisors	Louisville, Ky.	149.00	-1.97%	\$0.75	-4.91%	3.09%
609	Astoria Strategic Wealth	Austin, Texas	148.35	31.49%	\$1.69	19.54%	10.00%
610	Sebold Capital Management	Naperville, III.	147.45	-2.93%	\$1.19	-9.20%	6.90%
611	Professional Financial Strategies	Pittsford, N.Y.	147.38	-10.35%	\$1.57	-8.45%	-2.08%
612	Falcon Wealth Planning	Ontario, Calif.	145.46	10.19%	\$0.36	-16.53%	32.01%
613	Charleston Financial Advisors	Charleston, S.C.	144.50	-6.02%	\$1.00	-9.94%	4.35%
614		Decement III	142.10	0.000/	\$0.88	-3.47%	4.52%
	Vital Wealth Managem	Rosemont, III.	143.18	0.89%	ψ0.00		
615	Vital Wealth Managem Kemp Financial Management	Fullerton, Calif.	143.16	8.33%	\$1.01	1.42%	6.82%
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615	Kemp Financial Management	Fullerton, Calif.	143.00	8.33%	\$1.01	1.42%	-4.61%
615 616	Kemp Financial Management Macke Financial Advisory Group	Fullerton, Calif. Fort Myers, Fla.	143.00 142.49	8.33% -2.64%	\$1.01 \$0.98	1.42% 2.06%	-4.61% 1.96%
615 616 617	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management	Fullerton, Calif. Fort Myers, Fla. Northbrook, III.	143.00 142.49 141.57	8.33% -2.64% -9.14%	\$1.01 \$0.98 \$0.91	1.42% 2.06% -10.89%	-4.61% 1.96% 6.98%
615 616 617 618	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management Private Capital Management	Fullerton, Calif. Fort Myers, Fla. Northbrook, III. Larkspur, Calif.	143.00 142.49 141.57 141.00	8.33% -2.64% -9.14% 6.33%	\$1.01 \$0.98 \$0.91 \$3.07	1.42% 2.06% -10.89% -0.60%	-4.61% 1.96% 6.98% 1.61%
615 616 617 618 619	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management Private Capital Management Arista Wealth Advisors	Fullerton, Calif. Fort Myers, Fla. Northbrook, III. Larkspur, Calif. Albany, N.Y.	143.00 142.49 141.57 141.00 137.79	8.33% -2.64% -9.14% 6.33% -4.33%	\$1.01 \$0.98 \$0.91 \$3.07 \$1.09	1.42% 2.06% -10.89% -0.60% -5.85%	-4.61% 1.96% 6.98% 1.61% 10.19%
615 616 617 618 619 620	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management Private Capital Management Arista Wealth Advisors Miramontes Capital	Fullerton, Calif. Fort Myers, Fla. Northbrook, III. Larkspur, Calif. Albany, N.Y. Newport Beach, Calif.	143.00 142.49 141.57 141.00 137.79 136.00	8.33% -2.64% -9.14% 6.33% -4.33% 24.77%	\$1.01 \$0.98 \$0.91 \$3.07 \$1.09 \$0.22	1.42% 2.06% -10.89% -0.60% -5.85% 13.23%	-4.61% 1.96% 6.98% 1.61% 10.19% 0.89%
615 616 617 618 619 620 621	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management Private Capital Management Arista Wealth Advisors Miramontes Capital Byrne Asset Management	Fullerton, Calif. Fort Myers, Fla. Northbrook, III. Larkspur, Calif. Albany, N.Y. Newport Beach, Calif. Preston, N.J.	143.00 142.49 141.57 141.00 137.79 136.00 135.86	8.33% -2.64% -9.14% 6.33% -4.33% 24.77% -6.67%	\$1.01 \$0.98 \$0.91 \$3.07 \$1.09 \$0.22 \$1.20	1.42% 2.06% -10.89% -0.60% -5.85% 13.23% -7.50%	-4.61% 1.96% 6.98% 1.61% 10.19% 0.89% -2.55%
615 616 617 618 619 620 621 622	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management Private Capital Management Arista Wealth Advisors Miramontes Capital Byrne Asset Management TABR Capital Management	Fullerton, Calif. Fort Myers, Fla. Northbrook, III. Larkspur, Calif. Albany, N.Y. Newport Beach, Calif. Preston, N.J. Orange, Calif.	143.00 142.49 141.57 141.00 137.79 136.00 135.86 135.82	8.33% -2.64% -9.14% 6.33% -4.33% 24.77% -6.67% -3.43%	\$1.01 \$0.98 \$0.91 \$3.07 \$1.09 \$0.22 \$1.20 \$0.59	1.42% 2.06% -10.89% -0.60% -5.85% 13.23% -7.50% -0.90%	-4.61% 1.96% 6.98% 1.61% 10.19% 0.89% -2.55% 7.46%
615 616 617 618 619 620 621 622 623	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management Private Capital Management Arista Wealth Advisors Miramontes Capital Byrne Asset Management TABR Capital Management Investor's Capital Management	Fullerton, Calif. Fort Myers, Fla. Northbrook, III. Larkspur, Calif. Albany, N.Y. Newport Beach, Calif. Preston, N.J. Orange, Calif. Menlo Park, Calif.	143.00 142.49 141.57 141.00 137.79 136.00 135.86 135.82	8.33% -2.64% -9.14% 6.33% -4.33% 24.77% -6.67% -3.43% -0.98%	\$1.01 \$0.98 \$0.91 \$3.07 \$1.09 \$0.22 \$1.20 \$0.59 \$1.88	1.42% 2.06% -10.89% -0.60% -5.85% 13.23% -7.50% -0.90% -7.86%	-4.61% 1.96% 6.98% 1.61% 10.19% 0.89% -2.55% 7.46% 14.40%
615 616 617 618 619 620 621 622 623 624	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management Private Capital Management Arista Wealth Advisors Miramontes Capital Byrne Asset Management TABR Capital Management Investor's Capital Management Integrated Capital Management	Fullerton, Calif. Fort Myers, Fla. Northbrook, Ill. Larkspur, Calif. Albany, N.Y. Newport Beach, Calif. Preston, N.J. Orange, Calif. Menlo Park, Calif. Bloomfield Hills, Mich.	143.00 142.49 141.57 141.00 137.79 136.00 135.86 135.82 135.54	8.33% -2.64% -9.14% 6.33% -4.33% 24.77% -6.67% -3.43% -0.98% 26.99%	\$1.01 \$0.98 \$0.91 \$3.07 \$1.09 \$0.22 \$1.20 \$0.59 \$1.88 \$0.45	1.42% 2.06% -10.89% -0.60% -5.85% 13.23% -7.50% -0.90% -7.86% 11.01%	-4.61% 1.96% 6.98% 1.61% 10.19% 0.89% -2.55% 7.46% 14.40% 0.00%
615 616 617 618 619 620 621 622 623 624 625	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management Private Capital Management Arista Wealth Advisors Miramontes Capital Byrne Asset Management TABR Capital Management Investor's Capital Management Integrated Capital Management ETGeorge Investment Management	Fullerton, Calif. Fort Myers, Fla. Northbrook, III. Larkspur, Calif. Albany, N.Y. Newport Beach, Calif. Preston, N.J. Orange, Calif. Menlo Park, Calif. Bloomfield Hills, Mich. Starkville, Miss.	143.00 142.49 141.57 141.00 137.79 136.00 135.86 135.82 135.54 131.17	8.33% -2.64% -9.14% 6.33% -4.33% 24.77% -6.67% -3.43% -0.98% 26.99% -2.65%	\$1.01 \$0.98 \$0.91 \$3.07 \$1.09 \$0.22 \$1.20 \$0.59 \$1.88 \$0.45 \$0.86	1.42% 2.06% -10.89% -0.60% -5.85% 13.23% -7.50% -0.90% -7.86% 11.01% -2.65%	-4.61% 1.96% 6.98% 1.61% 10.19% 0.89% -2.55% 7.46% 14.40% 0.00% -1.74%
615 616 617 618 619 620 621 622 623 624 625 626 627	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management Private Capital Management Arista Wealth Advisors Miramontes Capital Byrne Asset Management TABR Capital Management Investor's Capital Management Integrated Capital Management ETGeorge Investment Management Financial Management Concepts Gasber Financial Advisors	Fullerton, Calif. Fort Myers, Fla. Northbrook, III. Larkspur, Calif. Albany, N.Y. Newport Beach, Calif. Preston, N.J. Orange, Calif. Menlo Park, Calif. Bloomfield Hills, Mich. Starkville, Miss. Winter Springs, Fla. Folsom, Calif.	143.00 142.49 141.57 141.00 137.79 136.00 135.86 135.82 135.54 131.17 128.50 126.20 123.62	8.33% -2.64% -9.14% 6.33% -4.33% 24.77% -6.67% -3.43% -0.98% 26.99% -2.65% -8.68% -7.95%	\$1.01 \$0.98 \$0.91 \$3.07 \$1.09 \$0.22 \$1.20 \$0.59 \$1.88 \$0.45 \$0.86 \$0.75 \$0.88	1.42% 2.06% -10.89% -0.60% -5.85% 13.23% -7.50% -0.90% -7.86% 11.01% -2.65% -7.06% -7.95%	-4.61% 1.96% 6.98% 1.61% 0.89% -2.55% 7.46% 14.40% 0.00% -1.74% 0.00%
615 616 617 618 619 620 621 622 623 624 625 626 627 628	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management Private Capital Management Arista Wealth Advisors Miramontes Capital Byrne Asset Management TABR Capital Management Investor's Capital Management Integrated Capital Management ETGeorge Investment Management Financial Management Concepts Gasber Financial Advisors Shira Ridge Wealth Management	Fullerton, Calif. Fort Myers, Fla. Northbrook, III. Larkspur, Calif. Albany, N.Y. Newport Beach, Calif. Preston, N.J. Orange, Calif. Menlo Park, Calif. Bloomfield Hills, Mich. Starkville, Miss. Winter Springs, Fla. Folsom, Calif. Larkspur, Calif.	143.00 142.49 141.57 141.00 137.79 136.00 135.86 135.82 135.54 131.17 128.50 126.20 123.62 123.24	8.33% -2.64% -9.14% 6.33% -4.33% 24.77% -6.67% -3.43% -0.98% 26.99% -2.65% -8.68% -7.95% 0.81%	\$1.01 \$0.98 \$0.91 \$3.07 \$1.09 \$0.22 \$1.20 \$0.59 \$1.88 \$0.45 \$0.86 \$0.75 \$0.88 \$0.69	1.42% 2.06% -10.89% -0.60% -5.85% 13.23% -7.50% -0.90% -7.86% 11.01% -2.65% -7.06% -7.95% -9.89%	6.82% -4.61% 1.96% 6.98% 1.61% 10.19% 0.89% -2.55% 7.46% 14.40% 0.00% -1.74% 0.00% 11.88%
615 616 617 618 619 620 621 622 623 624 625 626 627	Kemp Financial Management Macke Financial Advisory Group Mendel Money Management Private Capital Management Arista Wealth Advisors Miramontes Capital Byrne Asset Management TABR Capital Management Investor's Capital Management Integrated Capital Management ETGeorge Investment Management Financial Management Concepts Gasber Financial Advisors	Fullerton, Calif. Fort Myers, Fla. Northbrook, III. Larkspur, Calif. Albany, N.Y. Newport Beach, Calif. Preston, N.J. Orange, Calif. Menlo Park, Calif. Bloomfield Hills, Mich. Starkville, Miss. Winter Springs, Fla. Folsom, Calif.	143.00 142.49 141.57 141.00 137.79 136.00 135.86 135.82 135.54 131.17 128.50 126.20 123.62	8.33% -2.64% -9.14% 6.33% -4.33% 24.77% -6.67% -3.43% -0.98% 26.99% -2.65% -8.68% -7.95%	\$1.01 \$0.98 \$0.91 \$3.07 \$1.09 \$0.22 \$1.20 \$0.59 \$1.88 \$0.45 \$0.86 \$0.75 \$0.88	1.42% 2.06% -10.89% -0.60% -5.85% 13.23% -7.50% -0.90% -7.86% 11.01% -2.65% -7.06% -7.95%	-4.61% 1.96% 6.98% 1.61% 10.19% 0.89% -2.55% 7.46% 14.40% 0.00% -1.74% 0.00%

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2018 OTAL ASSETS RANK	S FIRM NAME	LOCATION	YEAR END 2018 ASSETS (\$MM)*	% GROWTH IN ASSETS 2017-2018	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGI IN NO. OF CLIENT
632	Caissa Wealth Strategies	Bloomington, Minn.	118.50	23.44%	\$1.39	7.46%	14.86%
633	Colman Knight Advisory Group	Carlisle, Mass.	115.00	0.10%	\$1.53	1.43%	-1.32%
634	Salvus Wealth Management	Shrewsbury, N.J.	113.35	8.35%	\$1.08	-3.00%	11.70%
635	Purtill Financial	Highland Heights, Ohio	110.52	7.88%	\$0.67	-3.24%	11.49%
636	Ivy League Financial Advisors	Rockville, Md.	105.78	-13.12%	\$1.03	-13.12%	0.00%
637	HCO Private Wealth	Roanoke, Va.	105.00	10.53%	\$0.86	-1.25%	11.93%
638	Gold Medal Waters	Boulder, Colo.	103.39	0.20%	\$0.78	-14.11%	16.679
639	Financial Investment Team	Portland, Ore.	100.81	7.66%	\$0.27	-12.71%	23.339
640	Paragon Wealth Management	Provo, Utah	100.72	-2.02%	\$0.75	-0.56%	-1.479
641	BCK Partner	Corning, N.Y.	100.59	3.70%	\$0.64	-10.26%	15.56
642	Rebel Financial	Columbus, Ohio	100.22	5.39%	\$0.29	-15.69%	25.00
643	RHS Financial	San Francisco, Calif.	100.16	-5.32%	\$0.93	-11.46%	6.93
	ATEGORY: <\$100 million				70.00		
644	Flagship Capital Management	Media, Pa.	97.10	6.70%	\$0.84	3.92%	2.68
645	Atwater Wealth Management	Boston, Mass.	96.40	10.25%	\$1.27	5.90%	4.119
646	G. DeWayne McAnally	Oklahoma City, Okla.	94.00	10.59%	\$0.25	-4.16%	15.38
647	Smith Bruer Advisors	Tallahassee, Fla.	91.22	9.73%	\$0.70	-2.93%	13.04
648	Lighthouse Wealth Management	Ashland, Ohio	90.82	12.09%	\$0.30	6.91%	4.84
649			90.00	7.14%	\$0.30	-1.79%	9.09
	Williams Wealth Management Group	Bradenton, Fla.					
650	Hanseatic Management Services	Albuquerque, N.M.	88.41	-11.96%	\$1.28	26.32%	-30.30
651	Sage Future Financial	Albuquerque, N.M.	86.68	4.01%	\$2.11	-3.60%	7.89
652	Mosaic Wealth Management	Atlanta, Ga.	77.24	11.72%	\$1.17	6.65%	4.76
653	Foundation Wealth Management	Media, Pa.	77.00	16.00%	\$1.10	2.75%	12.90
654	Kotys Wealth Professionals	Valparaiso, Ind.	75.06	9.34%	\$0.29	0.76%	8.51
655	Elderado Financial	Montrose, Colo.	74.80	-10.41%	\$0.29	-9.35%	-1.17
656	Snowball Wealth Management	Louisville, Colo.	74.70	-21.78%	\$0.98	-24.87%	4.11
657	S. P. Parkin & Co	Chesterfield, Mo.	70.17	64.86%	\$0.90	35.27%	21.88
658	International Capital Management Corp	Dallas, Texas	63.89	-4.61%	\$1.21	-2.81%	-1.85
659	Sommers Financial Management	St. Helens, Ore.	62.00	19.23%	\$0.19	11.89%	6.56
660	The Dowling Group	Greenwich, Conn.	60.57	-4.59%	\$0.76	-4.59%	0.00
661	Chilmark Financial Advisors	Miami, Fla.	60.33	-4.41%	\$1.02	10.17%	-13.24
662	Hofer & Associates Wealth Management	Thousand Oaks, Calif.	60.28	33.85%	\$0.28	21.46%	10.20
663	Graf Financial	Baton Rouge, La.	55.52	-2.62%	\$0.72	-7.67%	5.48
664	Ark Royal Wealth Management	Raleigh, N.C.	54.45	-1.71%	\$1.65	-13.63%	13.79
665	Clary Financial	So. Easton, Mass.	50.00	0.00%	\$0.13	-6.25%	6.67
666	Bills Asset Management	Nashville, Tenn.	49.00	-10.91%	\$0.22	-16.85%	7.14
667	Royal Asset Managers	Saint Charles, III.	47.50	10.47%	\$1.25	4.65%	5.56
668	Synergy Wealth Management	Grand Rapids, Mich.	47.40	4.76%	\$0.18	-19.42%	30.00
669	Safe Harbor Asset Management	Huntington, N.Y.	46.61	32.88%	\$0.88	25.36%	6.00
670	GLO CPAs	Houston, Texas	45.00	-6.25%	\$0.75	1.56%	-7.69
671	Timmons Wealth Management	Attleboro, Mass.	43.82	22.86%	\$0.51	0.00%	22.86
672	Keating Wealth Management	Greenwood Village, Colo.	41.92	12.11%	\$1.68	-23.77%	47.06
673	Oak Street Advisors	•	40.50				4.30
		Myrtle Beach, S.C.		10.62%	\$0.42	6.06%	
674	First and Main Financial	Piedmont, Calif.	36.00	12.50%	\$0.30	-6.25%	20.00
675	Private Client Wealth Advisors	Denver, Colo.	33.50	31.37%	\$0.27	-15.92%	56.25
676	Shriver Investments	Parker, Colo.	29.50	7.02%	\$0.41	4.05%	2.86
677	Hamilton Financial Planning	Austin, Texas	23.72	229.47%	\$0.30	45.97%	125.71
678	3Sisters Sustainable Management	Philadelphia, Pa.	21.44	-8.60%	\$0.86	-8.60%	0.00
679	Freitag Financial Group	Charlotte, N.C.	19.65	3.70%	\$0.66	-10.13%	15.38
680	Afterburner Financial	Round Rock, Texas	12.06	31.67%	\$0.17	-9.81%	46.00
681	Carthage Financial Group	Braintree, Mass.	7.50	0.00%	\$0.15	-20.00%	25.00
682	Lindy S. Diamond, Personal Financial Services	San Marcos, Calif.	5.68	-7.99%	\$1.42	-7.99%	0.00
683	Atherean Wealth Management	Jersey City, N.J.	4.07	38.31%	\$0.19	25.14%	10.53