

FINANCIAL ADVISOR

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# RIA

**SURVEY & RANKING 2019**

# FA's 2019 RIA RANKING

LUMA RAYMOND JAMES

| 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 |
|---|---|-----------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| <b>ASSET CATEGORY: \$1 BILLION AND OVER</b> |   |                       |                              |                              |                            |                               |                            |
| 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, Ill.         | 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                                     | Newtown Square, Pa.   | 15,021.77                    | -3.90%                       | \$67.06                    | -6.05%                        | 2.28%                      |
| 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, Ill.         | 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, Rehms & Foxworth                    | Chicago, Ill.         | 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, Ill.         | 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  | myCIO Wealth Partners                         | Philadelphia, Pa.     | 7,377.05                     | 12.98%                       | \$10.08                    | -0.60%                        | 13.66%                     |
| 34  | Gresham Partners                              | Chicago, Ill.         | 7,248.39                     | 4.52%                        | \$71.06                    | 0.42%                         | 4.08%                      |
| 35  | Mason Investment Advisory Services            | Reston, Va.           | 6,507.70                     | -6.65%                       | \$7.78                     | -12.57%                       | 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, Ill.        | 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%                     |
| 50  | Conrad Siegel                                 | Harrisburg, Pa.       | 5,178.36                     | 23.10%                       | \$20.31                    | 11.03%                        | 10.87%                     |
| 51  | CV Advisors                                   | Aventura, Fla.        | 5,064.49                     | -9.71%                       | \$64.11                    | -8.56%                        | -1.25%                     |
| 52  | Adviser Investments                           | Newton, Mass.         | 5,014.03                     | -5.51%                       | \$1.32                     | -6.55%                        | 1.12%                      |

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

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| 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, Ill.         | 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, Ill.         | 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                | Rhineland, Wis.       | 4,161.58                     | -2.01%                       | \$4.69                     | -17.90%                       | 19.35%                     |
| 68                     | Retirement Planners of America       | 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%                        | 7.14%                      |
| 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, Ill.         | 3,873.06                     | 156.13%                      | \$3.40                     | 101.71%                       | 26.98%                     |
| 79                     | Balasa Dinverno Foltz                | Itasca, Ill.          | 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                   | Sacramento, 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, Ill.         | 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%                        | 2.22%                      |
| 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%                        | 11.44%                     |
| 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%                     |

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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, Ill.     | 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, Ill.   | 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                     | St. Louis, Mo.        | 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, Ill.         | 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                     | -1.03%                        | -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%                         | 14.58%                     |
| 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%                      |
| 158                    | Coastal Bridge Advisors                  | Westport, Conn.       | 2,097.54                     | -11.67%                      | \$7.98                     | -1.26%                        | -10.54%                    |

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# FA's 2019 RIA RANKING

LUMA RAYMOND JAMES

| 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 |
|------------------------|--|-------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 159                    | Strategic Wealth Partners Group            | Deerfield, Ill.         | 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, Ill.           | 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, Ill.           | 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, Ill.           | 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, Ill.           | 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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# FA's 2019 RIA RANKING

LUMA RAYMOND JAMES

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|------------------------|--|--------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 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%                       | -1.18%                     |
| 219                    | Integrated Financial Group                 | Atlanta, Ga.             | 1,439.11                     | -23.99%                      | \$0.34                     | 7.33%                         | -29.19%                    |
| 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, Ill.      | 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, Ill.       | 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%                        | 7.82%                      |
| 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%                     |
| 264                    | Per Stirling Capital Management            | Austin, Texas            | 1,087.99                     | 74.82%                       | \$1.16                     | 36.92%                        | 27.68%                     |

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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%                        | 11.31%                     |
| 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%                        | 4.03%                      |
| 273  | Ruggie Wealth Management                 | Tavares, Fla.            | 1,050.53                     | 12.24%                       | \$2.71                     | 5.28%                         | 6.61%                      |
| 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%                        | 2.67%                      |
| 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%                         | 3.65%                      |
| 279  | Planning Alternatives                    | Bloomfield Hills, Mich.  | 1,017.11                     | -7.76%                       | \$1.25                     | -6.63%                        | -1.21%                     |
| 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%                     |
| <b>ASSET CATEGORY: \$500 million to &lt; \$1 billion</b> |  |                          |                              |                              |                            |                               |                            |
| 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%                       | \$1.53                     | -1.91%                        | 1.13%                      |
| 290  | Condor Capital Management                | Martinsville, N.J.       | 960.68                       | -4.50%                       | \$1.31                     | -5.93%                        | 1.52%                      |
| 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                       | 21.20%                       | \$4.65                     | 5.37%                         | 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, Ill.           | 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%                     |
| 316  | Baltimore Washington Financial Advisors  | Columbia, Md.            | 850.00                       | 0.00%                        | \$1.00                     | -17.65%                       | 21.43%                     |

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# FA's 2019 RIA RANKING

LUMA RAYMOND JAMES

| 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 |
|------------------------|---|-------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 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, Ill.         | 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 Advisors            | 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 Advisors                     | 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, Ill.            | 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%                      |
| 369                    | REDW Wealth                             | Albuquerque, N.M.       | 662.12                       | -5.46%                       | \$1.90                     | -7.36%                        | 2.05%                      |

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# FA's 2019 RIA RANKING

LUMA RAYMOND JAMES

| 2018<br>TOTAL ASSETS<br>RANK | FIRM NAME                                   | LOCATION                 | YEAR END<br>2018 ASSETS<br>(\$MM)* | % GROWTH<br>IN ASSETS<br>2017-2018 | ASSETS<br>PER CLIENT<br>(\$MM)** | % GROWTH<br>IN ASSETS<br>PER CLIENT | % CHANGE<br>IN NO.<br>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, Ill.            | 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%                           |
| 422                          | ARS Wealth Advisors                         | St. Petersburg, Fla.     | 503.11                             | -0.30%                             | \$1.14                           | -5.97%                              | 6.02%                            |

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# FA's 2019 RIA RANKING

| 2018<br>TOTAL ASSETS<br>RANK                              | FIRM NAME                              | LOCATION                 | YEAR END<br>2018 ASSETS<br>(\$MM)* | % GROWTH<br>IN ASSETS<br>2017-2018 | ASSETS<br>PER CLIENT<br>(\$MM)** | % GROWTH<br>IN ASSETS<br>PER CLIENT | % CHANGE<br>IN NO.<br>OF CLIENTS |
|---|--|--------------------------|------------------------------------|------------------------------------|----------------------------------|-------------------------------------|----------------------------------|
| <b>ASSET CATEGORY: \$300 million to &lt;\$500 million</b> |  |                          |                                    |                                    |                                  |                                     |                                  |
| 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 Advisors           | 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, Ill.             | 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%                              | -1.41%                           |
| 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%                               | 5.26%                            |
| 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, Ill.        | 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   | Summit Wealth Strategies               | Chesterfield, Mo.        | 385.58                             | 8.01%                              | \$0.28                           | -2.78%                              | 11.10%                           |
| 468   | Vestory                                | Seattle, Wash.           | 381.24                             | -8.23%                             | \$0.56                           | -7.42%                              | -0.87%                           |
| 469   | Klaas Financial Asset Advisors         | Loves Park, Ill.         | 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%                              | 2.54%                            |
| 471   | Financial Symmetry                     | Raleigh, N.C.            | 372.00                             | 1.36%                              | \$0.79                           | -10.07%                             | 12.71%                           |
| 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%                            |
| 474   | Silverleaf Advisor Group               | Omaha, Neb.              | 368.30                             | 11.42%                             | \$0.42                           | -8.06%                              | 21.19%                           |

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

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LUMA RAYMOND JAMES

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|---|-----------------------------------|--------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 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 Management         | 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, Ill.          | 322.96                       | -4.70%                       | \$1.76                     | -18.24%                       | 16.56%                     |
| 494   | Integrus 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, Ill.            | 300.58                       | -7.08%                       | \$1.89                     | -13.51%                       | 7.43%                      |
| <b>ASSET CATEGORY: \$150 million to &lt;\$300 million</b> |                                   |                          |                              |                              |                            |                               |                            |
| 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, Ill.    | 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, Ill.            | 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%                      |
| 525   | Allodium Investment Consultants   | Minneapolis, Minn.       | 255.49                       | 0.86%                        | \$1.26                     | -14.54%                       | 18.02%                     |
| 526   | Inspire Investing                 | Hollister, Calif.        | 251.78                       | 92.43%                       | \$0.55                     | 65.66%                        | 16.16%                     |

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|------------------------------|------------------------------------|-------------------------|------------------------------------|------------------------------------|----------------------------------|-------------------------------------|----------------------------------|
| 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, Ill.           | 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                            | Lexington, Ky.          | 225.43                             | 4.93%                              | \$0.83                           | 19.15%                              | -11.94%                          |
| 546                          | Smedley Financial Services         | Salt Lake City, Utah    | 224.60                             | 12.14%                             | \$0.26                           | 7.62%                               | 4.20%                            |
| 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                          | Morning 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, Ill.  | 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.            | 196.00                             | 2.62%                              | \$1.63                           | -10.21%                             | 14.29%                           |
| 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                          | Empyryon 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, Ill.           | 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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# FA's 2019 RIA RANKING

LUMA RAYMOND JAMES

| 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 |
|---|--|--------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 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, Ill.        | 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%                      |
| <b>ASSET CATEGORY: \$100 million to &lt;\$150 million</b> |  |                          |                              |                              |                            |                               |                            |
| 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, Ill.         | 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   | Vital Wealth Managem                     | Rosemont, Ill.           | 143.18                       | 0.89%                        | \$0.88                     | -3.47%                        | 4.52%                      |
| 615   | Kemp Financial Management                | Fullerton, Calif.        | 143.00                       | 8.33%                        | \$1.01                     | 1.42%                         | 6.82%                      |
| 616   | Macke Financial Advisory Group           | Fort Myers, Fla.         | 142.49                       | -2.64%                       | \$0.98                     | 2.06%                         | -4.61%                     |
| 617   | Mendel Money Management                  | Northbrook, Ill.         | 141.57                       | -9.14%                       | \$0.91                     | -10.89%                       | 1.96%                      |
| 618   | Private Capital Management               | Larkspur, Calif.         | 141.00                       | 6.33%                        | \$3.07                     | -0.60%                        | 6.98%                      |
| 619   | Arista Wealth Advisors                   | Albany, N.Y.             | 137.79                       | -4.33%                       | \$1.09                     | -5.85%                        | 1.61%                      |
| 620   | Miramontes Capital                       | Newport Beach, Calif.    | 136.00                       | 24.77%                       | \$0.22                     | 13.23%                        | 10.19%                     |
| 621   | Byrne Asset Management                   | Preston, N.J.            | 135.86                       | -6.67%                       | \$1.20                     | -7.50%                        | 0.89%                      |
| 622   | TABR Capital Management                  | Orange, Calif.           | 135.82                       | -3.43%                       | \$0.59                     | -0.90%                        | -2.55%                     |
| 623   | Investor's Capital Management            | Menlo Park, Calif.       | 135.54                       | -0.98%                       | \$1.88                     | -7.86%                        | 7.46%                      |
| 624   | Integrated Capital Management            | Bloomfield Hills, Mich.  | 131.17                       | 26.99%                       | \$0.45                     | 11.01%                        | 14.40%                     |
| 625   | ETGeorge Investment Management           | Starkville, Miss.        | 128.50                       | -2.65%                       | \$0.86                     | -2.65%                        | 0.00%                      |
| 626   | Financial Management Concepts            | Winter Springs, Fla.     | 126.20                       | -8.68%                       | \$0.75                     | -7.06%                        | -1.74%                     |
| 627   | Gasber Financial Advisors                | Folsom, Calif.           | 123.62                       | -7.95%                       | \$0.88                     | -7.95%                        | 0.00%                      |
| 628   | Shira Ridge Wealth Management            | Larkspur, Calif.         | 123.24                       | 0.81%                        | \$0.69                     | -9.89%                        | 11.88%                     |
| 629   | Clay Northam Wealth Management           | Seal Beach, Calif.       | 123.00                       | 0.82%                        | \$0.40                     | -4.14%                        | 5.17%                      |
| 630   | Cathy Pareto And Associate               | Coral Gables, Fla.       | 122.92                       | 0.53%                        | \$0.77                     | -5.76%                        | 6.67%                      |
| 631   | Beacon Financial Advisors                | Rye Brook, N.Y.          | 119.40                       | -1.08%                       | \$2.84                     | -1.08%                        | 0.00%                      |

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# FA's 2019 RIA RANKING

LUMA RAYMOND JAMES

| 2018<br>TOTAL ASSETS<br>RANK             | FIRM NAME                                     | LOCATION                 | YEAR END<br>2018 ASSETS<br>(\$MM)* | % GROWTH<br>IN ASSETS<br>2017-2018 | ASSETS<br>PER CLIENT<br>(\$MM)** | % GROWTH<br>IN ASSETS<br>PER CLIENT | % CHANGE<br>IN NO.<br>OF CLIENTS |
|--|---|--------------------------|------------------------------------|------------------------------------|----------------------------------|-------------------------------------|----------------------------------|
| 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%                             | 16.67%                           |
| 639                                      | Financial Investment Team                     | Portland, Ore.           | 100.81                             | 7.66%                              | \$0.27                           | -12.71%                             | 23.33%                           |
| 640                                      | Paragon Wealth Management                     | Provo, Utah              | 100.72                             | -2.02%                             | \$0.75                           | -0.56%                              | -1.47%                           |
| 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%                            |
| <b>ASSET CATEGORY: &lt;\$100 million</b> |   |                          |                                    |                                    |                                  |                                     |                                  |
| 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%                               | 4.11%                            |
| 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                                      | Williams Wealth Management Group              | Bradenton, Fla.          | 90.00                              | 7.14%                              | \$0.30                           | -1.79%                              | 9.09%                            |
| 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, Ill.      | 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                           | Myrtle Beach, S.C.       | 40.50                              | 10.62%                             | \$0.42                           | 6.06%                               | 4.30%                            |
| 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%                           |

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