



FINANCIAL ADVISOR

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# RIA

**SURVEY & RANKING 2019**

# FA's 2019 RIA RANKING



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
ASSET CATEGORY: \$1 BILLION AND OVER							
1	CAPTRUST	Raleigh, N.C.	289,654.60	5.72%	\$43.51	-22.50%	36.41%
2	Edelman Financial Engines	Sunnyvale, Calif.	181,300.00	7.02%	\$0.17	16.74%	-8.32%
3	Fisher Investments	Camas, Wash.	94,107.84	-2.00%	\$1.63	-21.79%	25.30%
4	First Republic Investment Management	San Francisco, Calif.	78,291.03	5.75%	\$5.90	-12.13%	20.34%
5	Fort Washington Investment Advisors	Cincinnati, Ohio	52,421.78	-3.89%	\$79.43	-5.05%	1.23%
6	Creative Planning	Overland Park, Kan.	33,905.05	5.90%	\$1.08	-19.56%	31.64%
7	Advanced Capital Group	Minneapolis, Minn.	22,774.70	39.18%	\$88.96	48.42%	-6.23%
8	United Capital Financial Advisers	Newport Beach, Calif.	22,056.50	2.70%	\$1.08	4.11%	-1.35%
9	Mariner Wealth Advisors	Overland Park, Kan.	22,043.09	37.22%	\$1.39	14.69%	19.65%
10	Moneta	St. Louis, Mo.	20,257.47	9.42%	\$4.35	9.38%	0.04%
11	Silvercrest Asset Management Group	New York, N.Y.	19,032.24	-10.65%	\$26.88	-9.26%	-1.53%
12	Segall Bryant & Hamill	Chicago, 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	New York, NY	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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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



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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	Alttest 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	-0.59%	\$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%
ASSET CATEGORY: \$500 million to < \$1 billion							
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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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 Advisers	Carlsbad, Calif.	740.00	68.18%	\$0.62	19.13%	41.18%
350	Corrigan Financial	Middletown, R.I.	735.00	-5.77%	\$0.75	-8.37%	2.84%
351	WealthSource Partners	Arroyo Grande, Calif.	730.30	11.12%	\$0.47	-10.48%	24.14%
352	The Insight Group	Salt Lake City, Utah	727.35	3.10%	\$1.80	-0.72%	3.85%
353	Smith Anglin Financial	Dallas, Texas	722.23	5.80%	\$0.86	2.29%	3.43%
354	CJM Wealth Advisers	Fairfax, Va.	718.62	-1.94%	\$0.95	-4.02%	2.17%
355	Oakbridge Partners	Atlanta, Ga.	715.38	2.77%	\$1.66	-3.41%	6.40%
356	Woodmont Investment Counsel	Nashville, Tenn.	715.07	3.63%	\$2.38	-2.24%	6.01%
357	Aurum Wealth Management	Mayfield Village, Ohio	709.00	-0.73%	\$0.86	-12.16%	13.01%
358	Cable Hill Partners	Portland, Ore.	708.33	14.76%	\$1.23	-0.38%	15.20%
359	Hemington Wealth Management	Falls Church, Va.	706.48	-1.42%	\$1.64	-18.35%	20.73%
360	Cardan Capital Partners	Denver, Colo.	702.54	0.06%	\$2.21	-10.01%	11.19%
361	Steel Peak Wealth Management	Woodland Hills, Calif.	683.95	-18.79%	\$0.57	-18.99%	0.25%
362	Burton Enright Welch	Walnut Creek, Calif.	683.30	5.01%	\$1.69	5.53%	-0.49%
363	Raffa Wealth Management	Washington, D.C.	678.46	-0.81%	\$4.71	-6.32%	5.88%
364	The Planning Center	Moline, 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



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
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	Moisan 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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ASSET CATEGORY: \$300 million to <\$500 million							
423	Stratos Wealth Advisors	Beachwood, Ohio	494.63	NM	\$0.54	NM	NM
424	FJY Financial	Reston, Va.	493.26	-3.69%	\$1.44	-6.22%	2.70%
425	The Wealth Collaborative	Westlake Village, Calif.	491.38	-3.79%	\$2.47	-12.01%	9.34%
426	Starfire Investment Advisers	Southfield, Mich.	483.64	2.84%	\$1.57	0.84%	1.99%
427	Red Door Wealth Management	Memphis, Tenn.	481.03	37.07%	\$1.60	16.12%	18.04%
428	Socius Family Office	Fort Lauderdale, Fla.	477.69	22.22%	\$4.55	17.57%	3.96%
429	Concentus Wealth Advisors	Berwyn, Pa.	477.68	-7.08%	\$2.09	-8.71%	1.78%
430	Jackson Financial Management	Costa Mesa, Calif.	477.39	-2.55%	\$1.01	-5.65%	3.29%
431	Roof Advisory Group	Harrisburg, Pa.	476.25	1.06%	\$2.11	-4.31%	5.61%
432	Greenline Partners	New York, N.Y.	475.73	-5.69%	\$16.99	-5.69%	0.00%
433	Porter White & Company	Birmingham, Ala.	474.44	-11.49%	\$4.61	-15.79%	5.10%
434	Fairman Group Family Office	Berwyn, Pa.	471.45	-3.50%	\$4.14	-11.11%	8.57%
435	Ellis Investment Partners	Berwyn, Pa.	470.93	-0.97%	\$0.84	-9.76%	9.75%
436	The Arkansas Financial Group	Little Rock, Ark.	467.14	-2.03%	\$1.52	-5.53%	3.70%
437	Financial Partners Capital Management	New York, N.Y.	466.15	-44.74%	\$1.86	-36.34%	-13.19%
438	Virtue Capital Management	Brentwood, Tenn.	465.24	36.69%	\$0.10	102.51%	-32.50%
439	Rappaport Reiches Capital Management	Skokie, 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%

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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	Integris Wealth Management	Monterey, Calif.	322.78	6.92%	\$1.96	-4.10%	11.49%
495	Financial Insight Center	Salt Lake City, Utah	317.82	13.77%	\$0.31	5.36%	7.98%
496	Hopwood Financial Services	Reston, Va.	316.48	2.79%	\$1.48	-11.14%	15.68%
497	Mark Sheptoff Financial Planning	Glastonbury, Conn.	315.55	10.72%	\$0.86	4.65%	5.80%
498	HFG Wealth Management	The Woodlands, Texas	314.70	10.36%	\$1.14	-7.70%	19.57%
499	Heron Wealth	New York, N.Y.	314.16	0.58%	\$2.05	-9.28%	10.87%
500	Apex Financial Advisors	Yardley, Pa.	311.10	16.17%	\$4.15	8.43%	7.14%
501	Cedar Rowe Partners	Atlanta, Ga.	309.17	-13.10%	\$2.81	-5.99%	-7.56%
502	Next Generation Wealth Management	Milwaukee, Wis.	307.34	8.92%	\$1.07	-1.33%	10.38%
503	Point View Wealth Management	Summit, N.J.	306.78	-7.70%	\$1.84	-11.57%	4.38%
504	Wealth Care	Merritt Island, Fla.	306.00	-8.38%	\$2.11	-16.60%	9.85%
505	Align Wealth Management	Oklahoma City, Okla.	305.40	3.32%	\$1.49	-6.76%	10.81%
506	Gradient Capital Advisors	San Diego, Calif.	301.13	0.18%	\$0.74	-3.02%	3.30%
507	Clune & Associates	Chicago, Ill.	300.58	-7.08%	\$1.89	-13.51%	7.43%
ASSET CATEGORY: \$150 million to <\$300 million							
508	WJ Interests	Sugar Land, Texas	299.00	-8.56%	\$1.40	-10.27%	1.90%
509	Regency Wealth Management	Ramsey, N.J.	296.80	15.87%	\$1.54	13.47%	2.12%
510	Century Wealth Management	Memphis, Tenn.	296.63	10.02%	\$5.20	-1.56%	11.76%
511	Andrews, Lucia Wealth Management	Danville, Calif.	294.17	-2.75%	\$1.82	-4.55%	1.89%
512	Court Place Advisors	West Friendship, Md.	292.91	-6.09%	\$0.90	-8.98%	3.17%
513	W.A. Smith Financial Group	Sandusky, Ohio	290.92	33.50%	\$0.27	20.19%	11.08%
514	Monument Wealth Management	Alexandria, Va.	290.68	5.14%	\$1.54	1.80%	3.28%
515	Pinnacle Financial Group	Western Springs, 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	Morling Financial Advisors	San Francisco, Calif.	212.60	6.48%	\$0.90	-1.19%	7.76%
557	Camarda Wealth Advisory Group	Fleming Island, Fla.	211.34	-0.70%	\$0.50	-5.85%	5.47%
558	The Doman Group	New York, N.Y.	211.00	27.11%	\$3.40	29.16%	-1.59%
559	Castleview Wealth Advisors	Oklahoma City, Okla.	209.00	81.74%	\$1.39	22.37%	48.51%
560	DeGreen Capital Management	Scottsdale, Ariz.	207.40	-8.55%	\$0.77	-19.77%	13.98%
561	Asset Planning Corporation	Knoxville, Tenn.	204.99	-2.96%	\$1.05	-7.42%	4.81%
562	Financial Alternatives	La Jolla, Calif.	204.78	2.23%	\$1.69	-4.53%	7.08%
563	Baron Financial Group	Fair Lawn, N.J.	203.42	-12.12%	\$0.75	-12.77%	0.74%
564	Spotlight Asset Group	Oakbrook Terrace, 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



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%
ASSET CATEGORY: \$100 million to <\$150 million							
607	Longview Financial Advisors	Huntsville, Ala.	149.38	-6.57%	\$0.82	-8.11%	1.67%
608	Centerline Wealth Advisors	Louisville, Ky.	149.00	-1.97%	\$0.75	-4.91%	3.09%
609	Astoria Strategic Wealth	Austin, Texas	148.35	31.49%	\$1.69	19.54%	10.00%
610	Sebold Capital Management	Naperville, 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



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
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%
ASSET CATEGORY: <\$100 million							
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	Athorean Wealth Management	Jersey City, N.J.	4.07	38.31%	\$0.19	25.14%	10.53%

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**SURVEY & RANKING 2019**

***Top 50 Fastest-Growing Firms***

# TOP 50 FASTEST-GROWING FIRMS<sup>\*</sup> With More Than \$300 Million In AUM

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

<sup>\*</sup> Only firms founded in 2015 or earlier are included.

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