

FINANCIAL ADVISOR

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July 2018 • www.fa-mag.com

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SURVEY AND RANKING 2018

FA's 2018 RIA RANKING



2017 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2017 ASSETS (\$MM)*	% GROWTH IN ASSETS 2016-2017	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.	273,979.44	28.35%	\$56.14	7.31%	19.61%
2	Fisher Investments	Camas, Wash.	96,031.57	33.77%	\$2.24	20.97%	10.58%
3	First Republic Investment Management	San Francisco, Calif.	74,035.90	27.51%	\$6.71	17.47%	8.54%
4	Fort Washington Investment Advisors	Cincinnati, Ohio	56,302.83	18.78%	\$86.35	7.85%	10.14%
5	Creative Planning	Leawood, Kan.	32,017.25	44.01%	\$1.56	8.88%	32.26%
6	Edelman Financial Services	Fairfax, Va.	21,729.06	22.19%	\$0.61	9.26%	11.83%
7	United Capital Financial Advisers	Newport Beach, Calif.	21,475.76	22.98%	\$1.05	3.85%	18.42%
8	Silvercrest Asset Management Group	New York, N.Y.	21,300.00	14.52%	\$29.62	5.28%	8.77%
9	SCS Financial Services	Boston, Mass.	20,584.87	24.55%	\$141.96	19.40%	4.32%
10	CIBC Atlantic Trust Private Wealth Management	Atlanta, Ga.	18,733.80	85.36%	\$2.75	12.01%	65.49%
11	Moneta Group Investment Advisors	Clayton, Mo.	18,512.78	14.28%	\$3.97	7.70%	6.10%
12	Advanced Capital Group	Minneapolis, Minn.	16,363.31	19.56%	\$59.94	12.99%	5.81%
13	Mariner Wealth Advisors	Overland Park, Kan.	16,063.60	21.68%	\$1.22	0.95%	20.54%
14	Veritable	Newtown Square, Pa.	15,634.97	11.32%	\$71.39	9.29%	1.86%
15	Plante Moran Financial Advisors	Southfield, Mich.	14,324.32	19.40%	\$5.07	13.40%	5.29%
16	BBR Partners	New York, N.Y.	14,199.20	13.74%	\$106.76	6.90%	6.40%
17	DiMeo Schneider & Associates	Chicago, Ill.	13,338.71	17.36%	\$34.56	10.06%	6.63%
18	Segall Bryant & Hamill	Chicago, Ill.	12,471.13	23.97%	\$5.80	55.03%	-20.03%
19	Tiedemann Advisors	New York, N.Y.	12,301.60	49.57%	\$27.22	44.94%	3.20%
20	Buckingham Strategic Wealth	Saint Louis, Mo.	12,282.89	40.11%	\$1.92	7.33%	30.54%
21	Aspiriant	Los Angeles, Calif.	12,197.50	15.81%	\$7.49	-9.00%	27.27%
22	Brownson, Rehms & Foxworth	Chicago, Ill.	11,241.41	9.43%	\$24.07	6.61%	2.64%
23	Advanced Research Investment Solutions (ARIS)	Beverly Hills, Calif.	11,054.52	11.93%	\$221.09	-10.46%	25.00%
24	Mercer Global Advisors	Santa Barbara, Calif.	11,053.47	51.95%	\$1.55	27.76%	18.94%
25	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	10,902.65	22.43%	\$15.08	15.66%	5.86%
26	Johnson Investment Counsel	Cincinnati, Ohio	10,420.63	14.39%	\$2.79	2.60%	11.49%
27	Pathstone	Englewood, N.J.	8,548.67	0.06%	\$27.67	8.15%	-7.49%
28	RMB Capital Management	Chicago, Ill.	8,226.71	57.54%	\$4.89	39.19%	13.18%
29	Signature Estate & Investment Advisors	Los Angeles, Calif.	7,824.06	32.98%	\$1.10	4.83%	26.85%
30	Boston Private Wealth	Boston, Mass.	7,424.00	5.94%	\$2.81	9.95%	-3.65%
31	WE Family Offices	Miami, Fla.	7,378.34	38.13%	\$105.40	38.13%	0.00%
32	Evercore Wealth Management	New York, N.Y.	7,329.62	13.22%	\$12.22	7.75%	5.08%
33	Gresham Partners	Chicago, Ill.	6,935.12	22.74%	\$70.77	12.72%	8.89%
34	RSM US Wealth Management	Minneapolis, Minn.	6,726.00	19.64%	\$1.73	14.13%	4.82%
35	Ballentine Partners	Waltham, Mass.	6,698.58	4.71%	\$34.18	-4.37%	9.50%
36	myCIO Wealth Partners	Philadelphia, Pa.	6,529.28	14.02%	\$9.88	18.51%	-3.78%
37	GW & Wade	Wellesley, Mass.	6,317.56	14.32%	\$2.68	10.38%	3.57%
38	The Colony Group	Boston, Mass.	6,309.69	20.11%	\$3.34	17.44%	2.27%
39	Clarfeld Financial Advisors	Tarrytown, N.Y.	6,250.00	4.09%	\$15.24	0.28%	3.80%
40	Eaton Vance Investment Counsel	Boston, Mass.	6,234.00	14.91%	\$7.28	10.75%	3.76%
41	Mill Creek Capital Advisors	Conshohocken, Pa.	5,800.00	16.70%	\$18.01	13.08%	3.21%
42	Global Financial Private Capital	Sarasota, Fla.	5,790.56	2.01%	\$0.23	104.50%	-50.12%
43	Mason Investment Advisory Services	Reston, Va.	5,751.34	19.60%	\$7.47	14.32%	4.62%
44	Cornerstone Advisors Asset Management	Bethlehem, Pa.	5,718.89	34.89%	\$12.38	-73.14%	402.17%
45	CV Advisors	Aventura, Fla.	5,608.89	10.17%	\$70.11	32.20%	-16.67%
46	Tolleson Wealth Management	Dallas, Texas	5,604.82	14.00%	\$35.47	11.11%	2.60%
47	Homrich Berg	Atlanta, Ga.	5,596.56	24.38%	\$2.97	-1.73%	26.56%
48	Savant Capital	Rockford, Ill.	5,587.46	19.61%	\$1.27	12.70%	6.12%
49	Beacon Pointe Advisors	Newport Beach, Calif.	5,560.96	-16.48%	\$4.40	-14.17%	-2.69%
50	Athena Capital Advisors	Lincoln, Mass.	5,471.68	-0.48%	\$127.25	1.83%	-2.27%
51	Monroe Vos Consulting Group	Houston, Texas	5,361.76	8.60%	\$58.28	-0.85%	9.52%

* Discretionary and nondiscretionary AUM reported on Form ADV. ** Average assets per client relationship. NM = not meaningful. # Includes affiliates. ## Firm had significant increase in sub-advisory money management business.

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52	Douglas C. Lane & Associates	New York, N.Y.	5,327.31	17.81%	\$4.63	12.69%	4.55%
53	Adviser Investments	Newton, Mass.	5,306.28	14.08%	\$1.50	-2.83%	17.40%
54	Sontag Advisory	New York, N.Y.	5,271.39	10.04%	\$4.15	0.17%	9.85%
55	Ferguson Wellman Capital Management	Portland, Ore.	5,152.27	12.96%	\$6.46	8.85%	3.77%
56	Carson Wealth Management Group	Omaha, Neb.	5,106.53	22.29%	\$2.84	-0.13%	22.45%
57	Northside Capital Management	Hood River, Ore.	5,025.27	9.52%	\$179.47	9.52%	0.00%
58	Litman Gregory Asset Management	Walnut Creek, Calif.	5,004.63	2.18%	\$14.02	0.18%	2.00%
59	Brighton Jones	Seattle, Wash.	4,961.25	23.90%	\$3.31	5.73%	17.19%
60	Welch & Forbes	Boston, Mass.	4,898.04	15.40%	\$6.06	15.54%	-0.12%
61	Sentinel Pension Advisors	Wakefield, Mass.	4,874.05	34.10%	\$3.18	16.70%	14.91%
62	Hewins Financial Advisors Wipfli Hewins Investment Advisors	Milwaukee, Wis.	4,863.53	14.91%	\$2.47	4.06%	10.42%
63	Wetherby Asset Management	San Francisco, Calif.	4,681.56	15.14%	\$8.82	19.26%	-3.45%
64	MAI Capital Management	Cleveland, Ohio	4,568.98	17.54%	\$5.36	-3.96%	22.38%
65	Altair Advisers	Chicago, Ill.	4,528.60	17.45%	\$14.75	12.47%	4.42%
66	BIOIS	San Francisco, Calif.	4,434.00	25.40%	\$4.84	24.86%	0.44%
67	Finaccess Advisors	Miami, Fla.	4,388.93	0.80%	\$63.61	-16.73%	21.05%
68	Heck Capital Advisors	Rhineland, Wis.	4,247.03	18.53%	\$5.70	15.35%	2.76%
69	Freestone Capital Management	Seattle, Wash.	4,237.80	9.26%	\$2.63	3.76%	5.30%
70	Conrad Siegel	Harrisburg, Pa.	4,206.55	14.73%	\$18.70	-3.12%	18.42%
71	Money Matters with Ken Moraif	Plano, Texas	4,138.77	25.50%	\$0.53	12.63%	11.43%
72	Bartlett Wealth Management	Cincinnati, Ohio	4,132.69	15.49%	\$3.60	20.42%	-4.09%
73	WMS Partners	Towson, Md.	4,132.68	20.07%	\$11.32	13.49%	5.80%
74	Signature Family Wealth Advisors	Norfolk, Va.	4,111.70	16.07%	\$18.52	19.73%	-3.06%
75	Linden Global Strategies	New York, N.Y.	4,059.78	0.00%	\$115.99	-8.57%	9.38%
76	Lourd Capital (dba LourdMurray)	Beverly Hills, Calif.	4,022.00	12.06%	\$2.32	-2.40%	14.81%
77	Plancorp	St. Louis, Mo.	4,010.57	16.56%	\$3.43	7.99%	7.94%
78	Balasa Dinverno Foltz	Itasca, Ill.	3,994.19	20.61%	\$3.69	17.38%	2.75%
79	Dowling & Yahnke	San Diego, Calif.	3,958.17	15.93%	\$3.47	12.18%	3.35%
80	Sequoia Financial Group	Akron, Ohio	3,902.62	22.73%	\$1.73	7.99%	13.65%
81	Joel Isaacson & Co.	New York, N.Y.	3,856.66	17.35%	\$4.15	11.54%	5.21%
82	Ropes Wealth Advisors	Boston, Mass.	3,845.22	25.67%	\$3.70	21.92%	3.07%
83	Index Fund Advisors	Irvine, Calif.	3,825.75	24.63%	\$1.62	16.78%	6.72%
84	RegentAtlantic	Morristown, N.J.	3,766.40	15.37%	\$2.90	12.79%	2.28%
85	Cornerstone Advisors	Bellevue, Wash.	3,700.00	12.12%	\$4.63	5.11%	6.67%
86	Sullivan, Bruyette, Speros & Blayney	McLean, Va.	3,471.66	18.20%	\$3.51	14.14%	3.56%
87	Ingalls & Snyder	New York, N.Y.	3,444.63	20.03%	\$1.35	16.28%	3.23%
88	Pension Consultants	Springfield, Mo.	3,416.66	16.91%	\$37.96	29.90%	-10.00%
89	Valeo Financial Advisors	Indianapolis, Ind.	3,344.77	37.92%	\$2.23	14.93%	20.00%
90	Brightworth	Atlanta, Ga.	3,334.40	133.02%	\$2.56	14.72%	103.13%
91	EP Wealth Advisors	Torrance, Calif.	3,297.07	30.27%	\$1.27	10.23%	18.18%
92	Forum Financial Management	Lombard, Ill.	3,257.64	30.91%	\$0.98	6.63%	22.76%
93	Greenspring Advisors	Towson, Md.	3,228.44	57.13%	\$7.91	39.42%	12.71%
94	Kovitz Investment Group	Chicago, Ill.	3,200.00	18.52%	\$2.46	9.40%	8.33%
95	HBKS Wealth Advisors	Erie, Pa.	3,176.34	38.78%	\$0.69	18.96%	16.66%
96	SignatureFD	Atlanta, Ga.	3,061.09	19.58%	\$3.09	11.38%	7.36%
97	Massey Quick Simon	New Jersey, N.J.	3,027.74	56.59%	\$11.21	18.89%	31.71%
98	Honkamp Krueger Financial Services	Dubuque, Iowa	3,022.22	13.14%	\$0.89	9.31%	3.50%
99	Wilbanks, Smith & Thomas Asset Management	Norfolk, Va.	2,960.22	10.29%	\$1.23	5.61%	4.43%
100	Clifford Swan Investment Counselors	Pasadena, Calif.	2,919.00	18.23%	\$3.86	11.50%	6.03%
101	Inverness Counsel	New York, N.Y.	2,910.76	8.95%	\$6.59	0.57%	8.33%
102	Truepoint Wealth Counsel	Cincinnati, Ohio	2,807.14	15.49%	\$3.69	5.76%	9.20%
103	Prio Wealth	Boston, Mass.	2,800.00	12.00%	\$4.27	12.85%	-0.76%

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104	Telemus Capital	Southfield, Mich.	2,784.77	35.52%	\$2.32	19.71%	13.21%
105	Zhang Financial	Portage, Mich.	2,783.03	12.61%	\$2.14	3.94%	8.33%
106	Lido Advisors	Los Angeles, Calif.	2,772.83	60.64%	\$3.08	16.02%	38.46%
107	Wellesley Asset Management	Wellesley, Mass.	2,762.99	4.70%	\$1.62	8.00%	-3.06%
108	AE Wealth Management	Topeka, Kan.	2,759.05	303.64%	\$0.21	72.61%	133.84%
109	Covington Capital Management	Los Angeles, Calif.	2,685.39	13.40%	\$6.71	10.56%	2.56%
110	RAA	Addison, Texas	2,677.26	12.96%	\$0.87	13.88%	-0.81%
111	The Caprock Group	Boise, Idaho	2,633.99	14.52%	\$20.26	1.31%	13.04%
112	TCI Wealth Advisors	Tucson, Ariz.	2,603.52	16.24%	\$1.25	7.25%	8.38%
113	EMM Wealth	New York, N.Y.	2,598.02	15.05%	\$21.12	15.05%	0.00%
114	Crescent Grove Advisors	Lake Forest, Ill.	2,584.85	24.38%	\$15.57	14.64%	8.50%
115	Matter Family Office	Saint Louis, Mo.	2,578.35	9.99%	\$16.01	7.94%	1.90%
116	JMG Financial Group	Downers Grove, Ill.	2,578.00	23.47%	\$3.48	12.14%	10.10%
117	Parsec Financial Management	Asheville, N.C.	2,559.40	27.64%	\$1.63	15.83%	10.20%
118	Halbert Hargrove Global Advisors	Long Beach, Calif.	2,523.34	8.16%	\$4.10	0.42%	7.71%
119	Warren Averett Asset Management	Birmingham, Ala.	2,505.92	33.80%	\$2.20	4.88%	27.58%
120	Fort Pitt Capital Group	Pittsburgh, Pa.	2,505.83	21.63%	\$1.20	14.96%	5.81%
121	Budros, Ruhlin & Roe	Columbus, Ohio	2,497.71	11.74%	\$3.53	7.95%	3.51%
122	Westmount Asset Management	Los Angeles, Calif.	2,495.32	16.90%	\$2.21	8.81%	7.44%
123	Badgley Phelps Wealth Managers	Seattle, Wash.	2,489.87	12.65%	\$5.21	9.11%	3.24%
124	HM Capital Management	Clayton, Mo.	2,441.73	64.59%	\$24.18	54.81%	6.32%
125	Cafaro Greenleaf	Red Bank, N.J.	2,423.00	7.21%	\$17.69	1.73%	5.38%
126	JFS Wealth Advisors	Hermitage, Pa.	2,390.21	30.47%	\$1.23	-2.18%	33.38%
127	Modera Wealth Management	Westwood, N.J.	2,386.22	15.48%	\$1.85	-12.06%	31.33%
128	MRA Associates	Phoenix, Ariz.	2,377.60	-12.14%	\$3.83	-18.94%	8.39%
129	TFO-TDC	Maumee, Ohio	2,375.25	44.12%	\$1.80	45.75%	-1.12%
130	Coastal Bridge Advisors	Westport, Conn.	2,374.79	36.41%	\$9.13	54.25%	-11.56%
131	Cassaday & Company	McLean, Va.	2,370.61	29.66%	\$1.27	18.32%	9.58%
132	The Pacific Financial Group	Bellevue, Wash.	2,327.86	30.46%	\$0.14	8.84%	19.87%
133	Frontier Investment Management Company	Dallas, Texas	2,323.74	25.46%	\$1.60	3.57%	21.14%
134	Mainstay Capital Management	Grand Blanc, Mich.	2,315.53	12.54%	\$0.65	13.39%	-0.75%
135	Beirne Wealth Consulting Services	Shelton, Conn.	2,295.17	14.68%	\$2.23	1.28%	13.23%
136	Destination Wealth Management	Walnut Creek, Calif.	2,252.00	21.66%	\$1.50	13.55%	7.14%
137	Palladium Registered Investment Advisors	Norfolk, Va.	2,244.32	13.51%	\$2.45	6.08%	7.00%
138	Sand Hill Global Advisors	Palo Alto, Calif.	2,226.59	23.60%	\$7.52	11.49%	10.86%
139	Brookstone Capital Management	Wheaton, Ill.	2,213.00	31.18%	\$0.18	14.78%	14.29%
140	Kovack Advisors	Fort Lauderdale, Fla.	2,193.65	29.74%	\$0.23	9.10%	18.92%
141	Grimes & Company	Westborough, Mass.	2,178.70	16.74%	\$0.99	14.57%	1.90%
142	Foster Group	West Des Moines, Iowa	2,162.00	13.79%	\$1.76	5.08%	8.29%
143	Keel Point	Huntsville, Ala.	2,153.31	26.29%	\$1.52	-12.09%	43.65%
144	Andersen Tax	McLean, Va.	2,116.92	8.42%	\$7.03	12.74%	-3.83%
145	Bordeaux Wealth Advisors	Menlo Park, Calif.	2,073.48	10.82%	\$21.38	7.39%	3.19%
146	Strategic Wealth Partners	Deerfield, Ill.	2,071.43	35.70%	\$3.58	5.88%	28.16%
147	Frontier Wealth Management	Kansas City, Mo.	2,052.86	21.10%	\$1.31	15.06%	5.25%
148	Pure Financial Advisors	San Diego, Calif.	2,039.68	27.22%	\$0.95	9.10%	16.60%
149	Genovese Burford & Brothers	Sacramento, Calif.	2,019.02	46.69%	\$1.72	21.20%	21.03%
150	Advisors Capital Management	Ridgewood, N.J.	2,013.81	34.41%	\$0.42	14.35%	17.54%
151	Pinnacle Advisory Group	Columbia, Md.	2,000.00	17.65%	\$1.62	10.51%	6.45%
152	Fairview Capital Investment Management	Greenbrae, Calif.	1,990.00	17.06%	\$11.31	11.07%	5.39%
153	Camden Capital	El Segundo, Calif.	1,977.60	15.39%	\$7.30	-7.18%	24.31%
154	RINET Company	Boston, Mass.	1,976.76	10.97%	\$11.30	-8.05%	20.69%
155	SJS Investment Services	Sylvania, Ohio	1,971.93	17.45%	\$2.98	10.88%	5.92%

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156	Water Oak Advisors	Winter Park, Fla.	1,970.85	16.50%	\$3.18	12.74%	3.33%
157	Wescott Financial Advisory Group	Philadelphia, Pa.	1,940.47	7.00%	\$4.44	-0.83%	7.90%
158	Burney Company	Reston, Va.	1,939.23	11.87%	\$0.89	15.36%	-3.02%
159	Carlson Capital Management	Northfield, Minn.	1,936.92	21.37%	\$2.11	12.40%	7.98%
160	Accredited Investors Wealth Management	Edina, Minn.	1,936.82	22.81%	\$4.23	16.11%	5.77%
161	Welch Hornsby	Montgomery, Ala.	1,929.18	11.11%	\$4.37	11.36%	-0.23%
162	Wealthcare Capital	Richmond, Va.	1,908.81	13.52%	\$0.58	27.74%	-11.13%
163	Gradient Investments	Arden Hills, Minn.	1,903.05	51.26%	\$0.18	24.83%	21.17%
164	Parallel Advisors	San Francisco, Calif.	1,875.59	36.17%	\$0.99	23.25%	10.48%
165	Sage Financial Group	Conshohocken, Pa.	1,850.34	17.73%	\$2.96	13.02%	4.17%
166	Crestwood Advisors	Boston, Mass.	1,831.70	24.68%	\$5.07	20.19%	3.74%
167	Resource Consulting Group	Orlando, Fla.	1,831.08	20.31%	\$4.41	13.65%	5.87%
168	Morton Capital Management	Calabasas, Calif.	1,828.90	11.63%	\$1.98	5.61%	5.71%
169	Annex Wealth Management	Elm Grove, Wis.	1,827.52	32.28%	\$0.33	1.30%	30.58%
170	G.W. Henssler & Associates	Kennesaw, Ga.	1,815.01	16.68%	\$1.72	12.58%	3.63%
171	Barrett Asset Management	New York, N.Y.	1,813.50	17.15%	\$8.98	7.87%	8.60%
172	Klingman & Associates	New York, N.Y.	1,790.19	18.87%	\$5.77	12.35%	5.80%
173	F.L. Putnam Investment Management Company	Wellesley Hills, Mass.	1,789.20	22.36%	\$3.33	17.12%	4.47%
174	PagnatoKarp	Reston, Va.	1,788.18	18.14%	\$5.20	3.03%	14.67%
175	Retirement Income Solutions	Ann Arbor, Mich.	1,768.16	15.40%	\$1.50	13.34%	1.82%
176	Chesley, Taft & Associates	Chicago, Ill.	1,760.82	14.46%	\$4.65	13.26%	1.07%
177	HoyleCohen	San Diego, Calif.	1,728.22	109.96%	\$1.54	-3.54%	117.67%
178	CM Wealth Advisors	Pepper Pike, Ohio	1,727.00	17.24%	\$10.22	38.75%	-15.50%
179	Radnor Financial Advisors	Wayne, Pa.	1,699.96	19.41%	\$4.90	9.08%	9.46%
180	Mission Wealth Management	Santa Barbara, Calif.	1,698.77	15.76%	\$1.98	5.80%	9.41%
181	Carnegie Investment Counsel	Pepper Pike, Ohio	1,687.80	32.74%	\$1.14	3.04%	28.82%
182	Courier Capital	Buffalo, N.Y.	1,684.94	26.70%	\$2.08	0.11%	26.56%
183	Filament	Seattle, Wash.	1,683.00	9.78%	\$23.05	6.78%	2.82%
184	Texas Yale Capital Corporation	St. Petersburg, Fla.	1,677.85	5.70%	\$15.68	-2.20%	8.08%
185	RCL Advisors	New York, N.Y.	1,666.90	19.28%	\$10.89	9.92%	8.51%
186	Brouwer and Janachowski	Mill Valley, Calif.	1,662.77	17.26%	\$2.33	7.10%	9.49%
187	Argent Wealth Management	Waltham, Mass.	1,625.73	5.92%	\$4.71	11.14%	-4.70%
188	Gratus Capital	Atlanta, Ga.	1,592.59	8.96%	\$3.17	-2.32%	11.56%
189	Golub Group	San Mateo, Calif.	1,586.86	12.87%	\$1.40	9.47%	3.10%
190	Birch Hill Investment Advisors	Boston, Mass.	1,583.16	12.76%	\$9.96	13.47%	-0.63%
191	Goelzer Investment Management	Indianapolis, Ind.	1,577.61	13.92%	\$3.25	14.15%	-0.21%
192	Obermeyer Wood Investment Counsel	Aspen, Colo.	1,567.00	3.84%	\$3.10	1.79%	2.02%
193	Arlington Partners	Birmingham, Ala.	1,557.80	1.96%	\$15.58	-3.14%	5.26%
194	MCF Advisors	Covington, Ky.	1,549.23	20.34%	\$2.39	0.81%	19.37%
195	North American Management Corp.	Boston, Mass.	1,519.64	10.34%	\$3.33	3.82%	6.28%
196	The Mather Group	Chicago, Ill.	1,512.14	55.12%	\$1.69	24.51%	24.58%
197	M. Griffith Investment Services	New Hartford, N.Y.	1,502.68	19.07%	\$0.79	5.19%	13.19%
198	Wealth Management	Norfolk, Neb.	1,498.50	34.36%	\$0.26	5.90%	26.87%
199	Covenant	San Antonio, Texas	1,488.08	6.76%	\$3.93	-8.74%	16.98%
200	RTD Financial	Philadelphia, Pa.	1,487.11	18.95%	\$2.53	14.91%	3.52%
201	Farr Miller & Washington	Washington, D.C.	1,483.34	18.11%	\$2.50	7.18%	10.20%
202	Polaris Greystone Financial Group	San Rafael, Calif.	1,453.10	34.52%	\$1.00	0.19%	34.26%
203	Colorado Financial Management	Boulder, Colo.	1,450.28	23.69%	\$2.07	16.46%	6.21%
204	Provis Management Group	Clearwater, Fla.	1,449.14	14.97%	\$1.29	8.34%	6.12%
205	TrueWealth	Atlanta, Ga.	1,444.99	21.56%	\$2.83	12.04%	8.49%
206	Bridgewater Advisors	New York, N.Y.	1,430.69	18.02%	\$3.54	14.22%	3.32%
207	6 Meridian	Wichita, Kan.	1,427.83	56.79%	\$2.46	17.32%	33.64%

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FA's 2018 RIA RANKING



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208	FCE Group	Lake Success, N.Y.	1,426.63	2.45%	\$2.20	-12.91%	17.64%
209	Delegate Advisors	Chapel Hill, N.C.	1,425.06	-19.40%	\$57.00	-25.84%	8.70%
210	Heritage Financial Services	Westwood, Mass.	1,422.00	22.16%	\$1.68	14.10%	7.07%
211	BerganKDV Wealth Management	Bloomington, Minn.	1,389.22	2.79%	\$1.54	3.02%	-0.22%
212	West Financial Services	McLean, Va.	1,386.81	13.35%	\$2.27	24.68%	-9.09%
213	Horter Investment Management	Cincinnati, Ohio	1,381.38	27.61%	\$0.18	10.50%	15.48%
214	Schneider Downs Wealth Management Advisors	Pittsburgh, Pa.	1,379.80	13.75%	\$2.53	7.28%	6.03%
215	Sadoff Investment Management	Milwaukee, Wis.	1,372.50	22.56%	\$2.14	19.50%	2.56%
216	Capstone Financial Advisors	Downers Grove, Ill.	1,370.57	19.53%	\$2.94	6.45%	12.29%
217	Lucia Capital Group	San Diego, Calif.	1,368.94	175.33%	\$0.37	100.31%	37.45%
218	IPI Wealth Management	Decatur, Ill.	1,361.60	23.55%	\$0.25	-10.15%	37.50%
219	Singer Xenos Schechter Sosler Wealth Management	Coral Gables, Fla.	1,356.60	14.45%	\$2.34	10.51%	3.57%
220	Altfest Personal Wealth Management	New York, N.Y.	1,346.37	14.74%	\$2.17	9.18%	5.08%
221	Smith Salley & Associates	Greensboro, N.C.	1,345.65	9.63%	\$3.59	-4.98%	15.38%
222	Gamble Jones Investment Counsel	Pasadena, Calif.	1,335.95	14.13%	\$1.96	9.10%	4.62%
223	Fairway Wealth Management	Independence, Ohio	1,334.22	15.92%	\$7.06	9.79%	5.59%
224	Foster & Motley	Cincinnati, Ohio	1,328.47	14.11%	\$2.41	6.05%	7.60%
225	Aldrich Wealth	Lake Oswego, Ore.	1,301.24	39.87%	\$1.86	21.69%	14.94%
226	Rand & Associates	San Francisco, Calif.	1,300.00	40.54%	\$4.00	29.73%	8.33%
227	Guyasuta Investment Advisor	Pittsburgh, Pa.	1,286.77	3.66%	\$3.90	0.52%	3.13%
228	McQueen, Ball & Associates	Bethlehem, Pa.	1,283.34	8.54%	\$4.28	8.54%	0.00%
229	Raub Brock Capital Management	Larkspur, Calif.	1,274.91	27.43%	\$0.42	36.54%	-6.67%
230	Trumbower Financial Advisors	Bethesda, Md.	1,268.38	12.71%	\$5.56	1.83%	10.68%
231	TrustCore	Brentwood, Tenn.	1,259.68	0.39%	\$0.68	-9.37%	10.78%
232	GHP Investment Advisors	Denver, Colo.	1,254.11	18.57%	\$1.69	11.52%	6.31%
233	Legacy Wealth Management	Memphis, Tenn.	1,252.48	16.85%	\$1.33	4.23%	12.11%
234	LaSalle St. Investment Advisors	Elmhurst, Ill.	1,250.00	30.21%	\$1.79	11.61%	16.67%
235	The Karras Company	Roy, Utah	1,245.80	25.10%	\$6.23	21.97%	2.56%
236	SFMG Wealth Advisors	Plano, Texas	1,233.12	14.18%	\$2.02	2.58%	11.31%
237	Huber Financial Advisors	Lincolnshire, Ill.	1,232.90	1.01%	\$1.28	-3.20%	4.35%
238	Resource Management	Metairie, La.	1,232.14	23.21%	\$2.74	15.00%	7.14%
239	Regal Investment Advisors	Kentwood, Mich.	1,222.63	30.75%	\$0.19	1.69%	28.58%
240	Reilly Financial Advisors	La Mesa, Calif.	1,221.71	19.35%	\$1.36	14.04%	4.65%
241	Tom Johnson Investment Management	Oklahoma City, Okla.	1,220.00	14.88%	\$4.71	0.68%	14.10%
242	Chicago Partners Wealth Advisors	Chicago, Ill.	1,212.62	-25.66%	\$2.35	-45.87%	37.33%
243	True North Advisors	Dallas, Texas	1,209.26	6.74%	\$3.23	-2.39%	9.36%
244	Axia Advisory	Indianapolis, Ind.	1,207.35	7.07%	\$9.22	-2.74%	10.08%
245	Vivaldi Capital Management	Chicago, Ill.	1,205.68	41.70%	\$2.25	5.55%	34.25%
246	Private Ocean Wealth Management	San Rafael, Calif.	1,204.00	13.91%	\$2.53	11.04%	2.59%
247	The Windsor Group	Indianapolis, Ind.	1,192.99	21.87%	\$1.65	21.19%	0.56%
248	Summit Financial Strategies	Columbus, Ohio	1,189.51	16.62%	\$1.64	10.52%	5.52%
249	Stonebridge Capital Advisors	St Paul, Minn.	1,171.87	19.21%	\$0.76	3.67%	14.99%
250	LBMC Investment Advisors	Brentwood, Tenn.	1,159.14	11.75%	\$3.41	8.13%	3.34%
251	CPS Investment Advisors	Lakeland, Fla.	1,155.09	17.89%	\$0.56	9.24%	7.92%
252	Greenwich Wealth Management	Greenwich, Conn.	1,137.66	-22.36%	\$5.03	-37.13%	23.50%
253	Daintree Advisors	Boston, Mass.	1,125.91	8.04%	\$4.83	-7.26%	16.50%
254	Financial Advisory Service	Leawood, Kan.	1,116.62	15.81%	\$1.27	8.81%	6.43%
255	Planning Alternatives	Bloomfield Hills, Mich.	1,102.70	10.07%	\$1.58	10.07%	0.00%
256	Glassman Wealth Services	Vienna, Va.	1,098.43	10.57%	\$3.99	5.74%	4.56%
257	Lee Financial	Dallas, Texas	1,093.15	7.21%	\$2.67	3.81%	3.27%
258	Cornerstone Advisory	Hunt Valley, Md.	1,090.66	10.05%	\$1.69	0.67%	9.32%
259	Novare Capital Management	Charlotte, N.C.	1,083.37	23.80%	\$3.98	65.22%	-25.07%

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260	Bitterroot Capital Advisors	Bozeman, Mont.	1,083.11	59.90%	\$72.21	49.24%	7.14%
261	CFS Investment Advisory Services	Totowa, N.J.	1,065.92	20.60%	\$2.57	19.73%	0.73%
262	McKinley Carter Wealth Services	Wheeling, W. Va.	1,065.39	25.34%	\$1.25	19.60%	4.80%
263	Abacus Planning Group	Columbia, S.C.	1,056.27	19.70%	\$4.57	14.52%	4.52%
264	Willow Creek Wealth Management	Sebastopol, Calif.	1,046.86	15.84%	\$1.38	7.30%	7.97%
265	Whitnell & Co.	Oak Brook, Ill.	1,046.68	11.30%	\$2.25	11.78%	-0.43%
266	Durbin Bennett Private Wealth Management	Austin, Texas	1,040.85	20.17%	\$5.34	13.39%	5.98%
267	Vigilant Capital Management	Portland, Maine	1,040.65	35.98%	\$3.72	19.47%	13.82%
268	Embree Financial Group	Chicago, Ill.	1,031.00	24.82%	\$2.71	18.92%	4.96%
269	Beaird Harris	Dallas, Texas	1,028.06	11.32%	\$1.88	2.38%	8.73%
270	Round Table Wealth Management	Westfield, N.J.	1,022.77	0.00%	\$6.20	-9.09%	10.00%
271	Belpointe Asset Management	Greenwich, Conn.	1,016.56	77.79%	\$0.34	3.41%	71.92%
272	Cornerstone Capital	New York City, N.Y.	1,006.83	14.16%	\$34.72	-5.52%	20.83%
273	Condor Capital Management	Martinsville, N.J.	1,005.92	11.70%	\$1.39	10.62%	0.97%
274	Steinberg Global Asset Management, Ltd.	Boca Raton, Fla.	1,001.39	15.71%	\$2.01	10.59%	4.63%
275	Albion Financial Group	Salt Lake City, Utah	1,000.93	3.26%	\$1.69	1.17%	2.07%
ASSET CATEGORY: \$500 million to < \$1 billion							
276	Planning Solutions Group	Fulton, Md.	995.44	22.06%	\$1.01	5.93%	15.22%
277	CapTrust Financial Advisors	Holland, Mich.	990.79	13.59%	\$1.49	7.25%	5.91%
278	Capital Wealth Advisors	Naples, Fla.	982.87	36.99%	\$1.36	-24.42%	81.25%
279	Atlas Private Wealth Management	Albany, N.Y.	976.12	4.26%	\$0.65	4.26%	0.00%
280	Palisade Asset Management	Minneapolis, Minn.	961.55	30.57%	\$6.63	-6.35%	39.42%
281	Lexington Wealth Management	Lexington, Mass.	961.46	31.71%	\$2.58	18.64%	11.01%
282	TFC Financial Management	Boston, Mass.	957.61	21.54%	\$2.90	16.75%	4.10%
283	Resnick Advisors	Westport, Conn.	955.42	18.10%	\$1.01	9.21%	8.14%
284	Sapient Private Wealth Management	Eugene, Ore.	952.12	21.94%	\$1.78	16.23%	4.91%
285	Delphi Private Advisors	San Diego, Calif.	949.87	27.33%	\$5.08	19.16%	6.86%
286	Main Street Research	Sausalito, Calif.	946.19	33.41%	\$1.79	21.28%	10.00%
287	Meg Green & Associates	Plantation, Fla.	945.50	13.37%	\$2.10	0.77%	12.50%
288	Capital Wealth Planning	Naples, Fla.	930.00	43.08%	\$0.42	0.80%	41.94%
289	ML&R Wealth Management	Austin, Texas	925.82	19.71%	\$2.61	9.59%	9.23%
290	Altium Wealth Management	Purchase, N.Y.	911.42	82.46%	\$1.35	62.19%	12.50%
291	Versant Capital Management	Phoenix, Ariz.	909.28	45.81%	\$2.37	-23.86%	91.50%
292	TRUE Private Wealth Advisors	Salem, Ore.	907.77	30.56%	\$0.69	-0.99%	31.86%
293	Appleseed Capital	Chicago, Ill.	904.07	8.57%	\$1.40	13.27%	-4.15%
294	Romano Wealth Management	Evanston, Ill.	903.90	0.00%	\$1.40	-6.97%	7.49%
295	Meyer Capital Group	Marlton, N.J.	903.53	21.28%	\$1.27	20.94%	0.28%
296	West Coast Financial	Santa Barbara, Calif.	900.00	16.13%	\$1.88	-0.08%	16.22%
297	Miracle Mile Advisors	Los Angeles, Calif.	898.08	29.57%	\$2.75	8.50%	19.41%
298	SAX Wealth Advisors	Clifton, N.J.	895.33	45.96%	\$1.33	7.79%	35.41%
299	Wacker Wealth Partners	San Luis Obispo, Calif.	891.73	18.10%	\$1.53	15.26%	2.46%
300	AEPG Wealth Strategies	Warren, N.J.	890.76	19.75%	\$1.50	12.29%	6.64%
301	Ruggie Wealth Management *	Tavares, Fla.	888.36	33.13%	\$1.78	-2.35%	36.34%
302	Prosperity Capital Advisors	Westlake, Ohio	884.89	32.98%	\$0.44	66.23%	-20.00%
303	Wealthquest	Cincinnati, Ohio	874.69	15.94%	\$0.80	6.24%	9.13%
304	Valley National Financial Advisors	Bethlehem, Pa.	864.57	23.82%	\$0.46	17.17%	5.67%
305	Aurum Wealth Management	Mayfield Village, Ohio	860.00	70.43%	\$1.16	-47.79%	226.43%
306	Lutz Financial	Omaha, Neb.	856.18	32.30%	\$1.78	-1.53%	34.36%
307	Warwick Partners	Bryan, Texas	850.00	15.94%	\$5.09	13.86%	1.83%
308	Doyle Wealth Management	St. Petersburg, Fla.	845.96	18.51%	\$1.18	4.65%	13.25%
309	Financial Partners Capital Management	New York, N.Y.	843.53	16.20%	\$2.89	14.21%	1.74%
310	Steel Peak Wealth Management	Woodland Hills, Calif.	842.17	20.03%	\$0.58	8.67%	10.46%

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311	Patriot Investment Management Group	Knoxville, Tenn.	838.60	10.23%	\$0.51	-9.81%	22.22%
312	Edge Wealth Management	New York, N.Y.	835.15	-0.49%	\$2.14	-3.56%	3.17%
313	Schechter Investment Advisors	Birmingham, Mich.	831.75	13.77%	\$4.78	7.88%	5.45%
314	Oakwood Capital Management	Los Angeles, Calif.	830.57	6.96%	\$2.03	1.99%	4.87%
315	Austin Asset	Austin, Texas	830.00	11.26%	\$2.36	6.51%	4.46%
316	Column Capital Advisors	Indianapolis, Ind.	830.00	17.73%	\$3.14	7.92%	9.09%
317	Carnick & Kubik Group	Denver, Colo.	827.36	30.87%	\$1.52	13.85%	14.95%
318	Artemis Wealth Advisors	New York, N.Y.	824.00	3.65%	\$58.86	-11.16%	16.67%
319	Paragon Capital Management	Denver, Colo.	821.88	5.63%	\$5.34	0.83%	4.76%
320	Van Hulzen Asset Management	El Dorado Hills, Calif.	810.27	29.27%	\$1.30	15.83%	11.61%
321	YorkBridge Wealth Partners	New York, N.Y.	805.44	13.00%	\$3.18	-4.42%	18.22%
322	GFG Capital	Miami, Fla.	803.59	1.73%	\$3.28	-10.31%	13.43%
323	Kingsview Asset Management	Grants Pass, Ore.	801.38	113.33%	\$0.18	65.93%	28.57%
324	Beacon Financial Group	Dallas, Texas	791.89	14.37%	\$0.59	10.79%	3.23%
325	BT Wealth Management	Atlanta, Ga.	785.23	26.24%	\$3.02	1.97%	23.81%
326	Private Capital Management	Naples, Fla.	783.24	-1.32%	\$4.35	-6.80%	5.88%
327	Pettinga Financial Advisors	Evansville, Ind.	780.84	14.87%	\$1.43	13.40%	1.30%
328	Corrigan Financial	Middletown, R.I.	779.00	17.67%	\$0.86	14.17%	3.07%
329	LJPR Financial Advisors	Troy, Mich.	776.00	11.08%	\$0.65	8.19%	2.67%
330	Householder Group Estate & Retirement Specialists	Scottsdale, Ariz.	769.99	27.41%	\$0.16	-41.59%	118.12%
331	AJ Wealth	New York, N.Y.	764.00	42.35%	\$4.42	7.79%	32.06%
332	Marquette Asset Management	Minneapolis, Minn.	755.80	5.27%	\$6.05	4.43%	0.81%
333	SilverOak Wealth Management	Edina, Minn.	751.98	22.47%	\$2.70	15.01%	6.49%
334	Segment Wealth Management	Houston, Texas	750.01	20.51%	\$4.49	8.25%	11.33%
335	CapSouth Wealth Management	Dothan, Ala.	748.84	13.30%	\$2.46	9.58%	3.39%
336	Weatherly Asset Management	Del Mar, Calif.	744.47	24.87%	\$2.08	14.41%	9.15%
337	Medley & Brown	Ridgeland, Miss.	727.01	14.91%	\$1.40	14.46%	0.39%
338	Eclectic Associates	Fullerton, Calif.	723.03	12.10%	\$0.99	4.60%	7.17%
339	Ensemble Capital Management	Burlingame, Calif.	718.47	42.26%	\$4.85	24.96%	13.85%
340	Rockbridge Investment Management	Syracuse, N.Y.	717.68	26.79%	\$0.56	16.79%	8.57%
341	Hemington Wealth Management	Falls Church, Va.	716.69	19.74%	\$2.01	0.62%	19.00%
342	Leonetti & Associates	Buffalo Grove, Ill.	712.63	6.04%	\$1.74	2.42%	3.54%
343	Yeske Buie	San Francisco, Calif.	711.00	19.90%	\$2.78	14.75%	4.49%
344	Ritholtz Wealth Management	New York, N.Y.	708.00	49.68%	\$1.23	10.64%	35.29%
345	Pinnacle Wealth Planning Services	Mansfield, Ohio	707.71	18.76%	\$1.33	14.06%	4.12%
346	The Insight Group	Salt Lake City, Utah	705.48	25.34%	\$1.77	21.57%	3.10%
347	Ellenbecker Investment Group	Pewaukee, Wis.	704.10	30.21%	\$0.54	15.36%	12.87%
348	JoycePayne Partners	Richmond, Va.	702.63	14.72%	\$2.22	12.18%	2.26%
349	REDW Stanley Financial Advisors	Albuquerque, N.M.	700.37	16.09%	\$2.05	13.36%	2.40%
350	Cardan Capital Partners	Denver, Colo.	700.00	17.26%	\$3.50	0.84%	16.28%
351	The McGowan Group Asset Management	Dallas, Texas	697.94	14.87%	\$0.73	-3.27%	18.75%
352	Oakbridge Partners	Atlanta, Ga.	696.09	18.19%	\$1.71	11.20%	6.28%
353	Archford Capital Strategies	Swansea, Ill.	695.13	26.57%	\$1.37	27.82%	-0.98%
354	Petersen Hastings Investment Management	Kennewick, Wash.	690.29	17.82%	\$1.08	8.60%	8.49%
355	Woodmont Investment Counsel	Nashville, Tenn.	688.78	10.37%	\$2.50	0.33%	10.00%
356	Financial Synergies Asset Management	Houston, Texas	685.00	21.24%	\$1.49	-3.01%	25.00%
357	Triad Hybrid Solutions	Norcross, Ga.	684.01	26.24%	\$0.55	1.97%	23.80%
358	Retirement Investment Advisors	Oklahoma City, Okla.	682.86	21.87%	\$0.62	16.92%	4.23%
359	Soundmark Wealth Management	Kirkland, Wash.	680.00	13.24%	\$1.42	8.52%	4.35%
360	Deerfield Financial Advisors	Indianapolis, Ind.	672.95	10.36%	\$2.10	7.27%	2.88%
361	Aveo Capital Partners	Greenwood Village, Colo.	667.04	18.06%	\$0.70	-10.62%	32.08%
362	American Financial Advisors	Marietta, Ga.	665.00	16.67%	\$0.69	26.89%	-8.06%

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FA's 2018 RIA RANKING



2017 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2017 ASSETS (\$MM)*	% GROWTH IN ASSETS 2016-2017	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
363	Rathbone Warwick Investment Management	Boise, Idaho	664.90	22.43%	\$1.23	11.13%	10.16%
364	Capital Advantage	Lafayette, Calif.	664.30	16.46%	\$1.14	9.68%	6.18%
365	Trilogy Capital	Huntington Beach, Calif.	658.23	87.79%	\$0.12	-22.13%	141.16%
366	DiNuzzo Index Advisors	Beaver, Pa.	658.21	21.21%	\$0.84	16.58%	3.97%
367	Gerber Kawasaki	Santa Monica, Calif.	656.47	30.54%	\$0.13	19.25%	9.47%
368	Burton Enright Welch	Walnut Creek, Calif.	650.70	23.62%	\$1.60	18.46%	4.36%
369	Bridgecreek Investment Management	Tulsa, Okla.	650.00	8.33%	\$10.00	0.00%	8.33%
370	ACG Advisory Services	Midlothian, Va.	648.32	15.10%	\$2.47	15.54%	-0.38%
371	CRA Financial	Northfield, N.J.	641.62	22.05%	\$1.23	15.03%	6.10%
372	Stepp & Rothwell	Overland Park, Kan.	637.08	10.79%	\$2.60	11.25%	-0.41%
373	John E. Sestina and Company	Columbus, Ohio	635.43	18.15%	\$0.80	3.21%	14.47%
374	WealthStone	Columbus, Ohio	635.10	18.41%	\$2.12	18.41%	0.00%
375	Redwood Wealth Management	Alpharetta, Ga.	634.19	16.60%	\$1.03	12.25%	3.87%
376	Stevens Foster	Bloomington, Minn.	630.00	3.28%	\$1.38	-3.53%	7.06%
377	Mosaic Financial Partners	San Francisco, Calif.	622.85	11.73%	\$2.36	8.77%	2.72%
378	Per Stirling Capital Management	Austin, Texas	622.35	179.12%	\$0.84	39.75%	99.73%
379	Baltimore-Washington Financial Advisors	Columbia, Md.	620.00	19.23%	\$1.13	2.97%	15.79%
380	Cable Hill Partners	Portland, Ore.	617.00	13.63%	\$1.37	-5.31%	20.00%
381	Delta Financial Group	Basking Ridge, N.J.	614.27	31.53%	\$1.08	14.65%	14.72%
382	Triad Financial Advisors	Greensboro, N.C.	610.56	20.67%	\$0.93	15.19%	4.76%
383	Quadrant Capital Group	Cincinnati, Ohio	606.09	4.07%	\$20.20	-16.74%	25.00%
384	Horan Capital Management	Hunt Valley, Md.	604.78	24.68%	\$0.82	21.31%	2.78%
385	Azzad Asset Management	Falls Church, Va.	598.59	22.57%	\$0.63	16.12%	5.56%
386	Sather Financial Group	Victoria, Texas	589.03	22.36%	\$1.76	-1.75%	24.54%
387	Vintage Financial Services	Ann Arbor, Mich.	584.76	28.67%	\$1.21	15.93%	10.98%
388	Financial Advisory Corporation	Grand Rapids, Mich.	582.58	20.31%	\$3.27	14.23%	5.33%
389	Traphagen Investment Advisors	Oradell, N.J.	580.56	18.99%	\$0.52	15.81%	2.75%
390	Cahaba Wealth Management	Atlanta, Ga.	580.36	43.61%	\$1.25	27.83%	12.35%
391	Sunrise Advisors	Leawood, Kan.	574.00	14.34%	\$1.23	6.97%	6.90%
392	MBR Financial	Houston, Texas	570.77	9.84%	\$1.68	-1.47%	11.48%
393	St. Clair Advisors	Mayfield Heights, Ohio	570.60	8.48%	\$7.13	-2.37%	11.11%
394	Trustmont Advisory Group	Greensburg, Pa.	566.74	13.80%	\$0.13	13.80%	0.00%
395	PDS Planning	Columbus, Ohio	565.49	7.05%	\$1.13	1.29%	5.68%
396	Moisand Fitzgerald Tamayo	Orlando, Fla.	559.19	19.87%	\$1.06	7.66%	11.34%
397	Mitchell Capital Management	Leawood, Kan.	554.30	-2.22%	\$0.99	-7.98%	6.26%
398	Southern Financial Group	Birmingham, Ala.	553.75	16.71%	\$0.29	9.02%	7.05%
399	The Family Firm	Bethesda, Md.	550.43	5.58%	\$2.63	4.57%	0.97%
400	HTG Investment Advisors	New Canaan, Conn.	548.48	14.56%	\$1.97	11.26%	2.96%
401	Lassus Wherley	New Providence, N.J.	546.76	14.07%	\$1.59	13.07%	0.88%
402	PJS Investment Management	Cedarburg, Wis.	546.21	19.30%	\$1.91	16.80%	2.14%
403	Omnia Family Wealth	Aventura, Fla.	543.27	8.13%	\$9.88	-9.57%	19.57%
404	Evermay Wealth Management	Arlington, Va.	539.76	26.34%	\$1.87	11.42%	13.39%
405	Madison Wealth Management	Cincinnati, Ohio	537.75	18.81%	\$2.09	3.09%	15.25%
406	Porter White Investment Advisors	Birmingham, Ala.	536.03	34.36%	\$5.41	28.93%	4.21%
407	Blankinship & Foster	Solana Beach, Calif.	528.76	12.50%	\$2.14	7.49%	4.66%
408	Briaud Financial Advisors	College Station, Texas	528.27	4.45%	\$2.10	5.69%	-1.18%
409	Arista Wealth Management	Las Vegas, Nev.	527.88	5.76%	\$0.88	-29.49%	50.00%
410	Seasons of Advice Wealth Management	New York, N.Y.	525.81	N/A	\$0.81	N/A	N/A
411	American Financial Advisors	Orlando, Fla.	525.24	16.70%	\$0.81	36.09%	-14.25%
412	FJY Financial	Reston, Va.	523.18	19.38%	\$1.57	11.52%	7.05%
413	LVZ Advisors	Holland, Mich.	523.00	23.64%	\$0.35	7.16%	15.38%
414	New England Investment & Retirement Group	North Andover, Mass.	522.67	4.92%	\$0.72	-0.15%	5.08%

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415	Optima Asset Management	Dallas, Texas	513.90	19.01%	\$6.85	7.91%	10.29%
416	Janiczek Wealth Management	Denver, Colo.	512.04	2.42%	\$2.23	-13.17%	17.95%
417	Buffington Mohr McNeal	Boise, Idaho	511.37	15.52%	\$1.02	10.90%	4.17%
418	The Wealth Collaborative	Westlake Village, Calif.	510.67	25.53%	\$2.81	17.25%	7.06%
419	ARS Wealth Advisors	St. Petersburg, Fla.	504.63	11.35%	\$0.99	-0.46%	11.87%
ASSET CATEGORY: \$300 million to <\$500 million							
420	Financial Planning and Information Services	De Pere, Wis.	497.07	15.33%	\$0.56	9.56%	5.26%
421	Greenline Partners	New York, N.Y.	497.00	22.72%	\$17.14	5.79%	16.00%
422	Willis Johnson & Associates	Houston, Texas	496.33	36.27%	\$1.99	15.48%	18.01%
423	WorthPointe	Austin, Texas	494.01	13.75%	\$1.01	9.56%	3.82%
424	Jackson Financial Management	Costa Mesa, Calif.	489.89	16.31%	\$1.07	19.88%	-2.98%
425	Fairman Group Family Office	Berwyn, Pa.	488.52	17.91%	\$4.65	24.65%	-5.41%
426	Sigma Investment Management Co	Portland, Ore.	488.48	-26.12%	\$1.83	-23.91%	-2.91%
427	Corbenic Partners	Bethlehem, Pa.	488.09	16.41%	\$2.44	16.41%	0.00%
428	Blue Chip Partners	Farmington Hills, Mich.	487.30	30.04%	\$1.31	15.67%	12.42%
429	Total Wealth Planning	Cincinnati, Ohio	482.18	13.19%	\$1.29	-1.90%	15.38%
430	Fulcrum Capital	Seattle, Wash.	479.46	72.55%	\$6.39	24.24%	38.89%
431	Lodestar Private Asset Management	Alamo, Calif.	479.34	18.46%	\$2.01	19.45%	-0.83%
432	Ellis Investment Partners	Berwyn, Pa.	475.54	21.69%	\$0.93	9.12%	11.52%
433	Harris Financial Advisors	Torrance, Calif.	475.25	15.58%	\$1.28	13.72%	1.64%
434	GDM Advisory Group	Jenkintown, Pa.	471.40	7.91%	\$1.81	3.76%	4.00%
435	Roof Advisory Group	Harrisburg, Pa.	471.26	10.59%	\$2.20	7.49%	2.88%
436	The L. Warner Companies	Timonium, Md.	470.57	20.77%	\$1.84	13.23%	6.67%
437	Rappaport Reiches Capital Management	Skokie, Ill.	466.47	19.69%	\$1.84	11.68%	7.17%
438	Conlon Dart Wealth Management	Seattle, Wash.	464.21	14.69%	\$1.73	8.73%	5.49%
439	Droms Strauss Wealth Mangement	St. Louis, Mo.	463.00	20.89%	\$1.54	14.84%	5.26%
440	ClearRock Capital	Ketchum, Idaho	455.64	24.16%	\$1.60	25.91%	-1.39%
441	J.P. King Advisors	Walnut Creek, Calif.	454.90	16.64%	\$1.33	13.23%	3.01%
442	MainLine Private Wealth	Wynnewood, Pa.	452.89	20.66%	\$4.57	3.60%	16.47%
443	RS Crum	Newport Beach, Calif.	451.18	17.49%	\$1.82	1.86%	15.35%
444	Investmark Advisory Group	Stratford, Conn.	444.96	44.47%	\$0.83	34.26%	7.60%
445	Lara May & Associates	Falls Church, Va.	443.95	37.72%	\$0.63	27.89%	7.69%
446	Frisch Financial Group	Melville, N.Y.	441.66	19.13%	\$0.98	16.48%	2.27%
447	Gitterman Wealth Management	Edison, N.J.	440.75	9.86%	\$0.48	6.39%	3.26%
448	Labrum Wealth Management	Carlsbad, Calif.	440.65	18.62%	\$0.60	5.82%	12.10%
449	Insight Wealth Partners	Plano, Texas	436.80	19.80%	\$0.92	14.52%	4.62%
450	Asset Management Group	Stamford, Conn.	436.62	10.46%	\$1.63	10.05%	0.37%
451	Bernhardt Wealth Management	McLean, Va.	426.73	20.55%	\$2.20	19.30%	1.04%
452	Bouche Financial Group	Troy, N.Y.	425.37	24.83%	\$0.85	12.34%	11.11%
453	Demming Financial Sevices Corp	Aurora, Ohio	423.30	15.43%	\$0.42	9.66%	5.26%
454	White Oaks Wealth Advisors	Minneapolis, Minn.	421.62	1.82%	\$1.67	2.22%	-0.39%
455	Vestory	Bellevue, Wash.	417.04	41.67%	\$0.65	18.57%	19.48%
456	Glass Jacobson Financial Group	Owings Mills, Md.	413.29	2.95%	\$0.88	-2.97%	6.11%
457	Schiavi + Dattani	Wilmington, Del.	404.06	15.31%	\$2.53	10.99%	3.90%
458	Waller Financial Planning Group	Columbus, Ohio	402.91	20.61%	\$0.88	18.51%	1.77%
459	Goodman Financial Corporation	Houston, Texas	391.69	19.81%	\$1.72	12.46%	6.54%
460	J. W. Coons Advisors	Columbus, Ohio	387.04	12.78%	\$2.56	2.32%	10.22%
461	Ritter Daniher Financial Advisory	Cincinnati, Ohio	386.28	14.96%	\$1.22	12.78%	1.94%
462	KMH Wealth Management	Victoria, Texas	385.49	20.32%	\$0.95	10.83%	8.56%
463	BlueSky Wealth Advisors	New Bern, N.C.	384.04	14.45%	\$1.45	9.27%	4.74%
464	Financial Management Strategies	Valley View, Ohio	375.24	41.11%	\$0.35	5.11%	34.25%
465	Birchwood Financial Partners	Edina, Minn.	373.59	18.47%	\$0.99	17.21%	1.08%

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466	Sentinus	Oak Brook, Ill.	371.97	31.99%	\$1.00	14.65%	15.12%
467	Jentner Wealth Management	Akron, Ohio	370.26	15.90%	\$1.41	-9.31%	27.80%
468	Wellesley Investment Partners	Wellesley, Mass.	367.61	19.69%	\$2.04	1.07%	18.42%
469	Marotta Wealth Management	Charlottesville, Va.	360.92	20.92%	\$1.59	10.80%	9.13%
470	Level Financial Advisors	Amherst, N.Y.	360.15	17.48%	\$0.60	9.23%	7.55%
471	William Mack & Associates	Troy, Mich.	359.88	17.58%	\$0.40	16.28%	1.11%
472	Altrius Capital Management	New Bern, N.C.	358.92	30.67%	\$0.95	13.43%	15.20%
473	Boston Research and Management	Manchester-by-the-Sea, Mass.	358.00	8.40%	\$2.86	2.33%	5.93%
474	Summit Wealth Strategies	Chesterfield, Mo.	356.99	23.50%	\$0.29	12.55%	9.73%
475	Financial Symmetry	Raleigh, N.C.	356.00	29.45%	\$0.84	10.17%	17.50%
476	Cedar Rowe Partners	Atlanta, Ga.	355.78	27.74%	\$2.99	20.22%	6.25%
477	HORAN Capital Advisors	Cincinnati, Ohio	354.07	28.75%	\$2.08	12.09%	14.86%
478	Red Door Wealth Management	Memphis, Tenn.	350.95	28.17%	\$1.38	-4.50%	34.21%
479	Heron Wealth	New York, N.Y.	350.35	31.59%	\$2.69	18.43%	11.11%
480	Virtue Capital Management	Brentwood, Tenn.	340.36	71.48%	\$0.07	7.49%	59.54%
481	Hochman Cole Investment Advisors	Deerfield, Ill.	338.89	18.51%	\$2.16	17.75%	0.64%
482	Bourgeon Capital Management	Darien, Conn.	338.70	19.98%	\$1.63	12.48%	6.67%
483	Woodward Financial Advisors	Chapel Hill, N.C.	334.12	22.54%	\$2.39	15.53%	6.06%
484	Wealth Care	Merritt Island, Fla.	334.00	6.71%	\$2.69	11.87%	-4.62%
485	Point View Wealth Management	Summit, N.J.	332.37	18.03%	\$2.05	12.20%	5.19%
486	Financial Insights	Tacoma, Wash.	332.06	23.47%	\$0.57	6.37%	16.07%
487	WJ Interests	Sugar Land, Texas	327.00	19.34%	\$1.54	12.59%	6.00%
488	Tobias Financial Advisors	Plantation, Fla.	325.20	19.48%	\$1.83	2.70%	16.34%
489	Clune & Associates	Chicago, Ill.	323.40	21.40%	\$2.10	16.67%	4.05%
490	Net Worth Advisory Group	Sandy, Utah	312.16	20.98%	\$0.81	14.38%	5.77%
491	Court Place Advisors	Ellicott City, Md.	311.89	21.31%	\$0.99	5.52%	14.96%
492	Smedley Financial Services	Salt Lake City, Utah	309.82	15.82%	\$0.37	16.65%	-0.72%
493	Hopwood Financial Services	Reston, Va.	307.89	5.09%	\$1.66	1.68%	3.35%
494	Family Office Research	Bethesda, Md.	305.56	40.23%	\$5.46	10.18%	27.27%
495	Mark Sheptoff Financial Planning	Glastonbury, Conn.	303.68	12.47%	\$1.90	8.96%	3.23%
496	Andrews, Lucia Wealth Management	San Mateo, Calif.	302.48	14.86%	\$1.90	-5.36%	21.37%
497	Cabana (dba Cabana Asset Management) ##	Fayetteville, Ark.	301.19	926.66%	\$0.13	9.46%	837.96%
498	Grand Wealth Management	Grand Rapids, Mich.	300.65	35.42%	\$3.20	61.35%	-16.07%
499	Elser Financial Planning	Indianapolis, Ind.	300.02	59.70%	\$2.04	32.54%	20.49%
ASSET CATEGORY: \$150 million to <\$300 million							
500	Sikich Financial	Springfield, Ill.	297.91	26.75%	\$0.24	-13.00%	45.68%
501	Fairhaven Wealth Management	Oak Brook, Ill.	297.63	19.97%	\$0.88	-1.20%	21.43%
502	Hines Warner Wealth Management	Portland, Ore.	296.28	23.01%	\$1.74	15.05%	6.92%
503	Align Wealth Management	Oklahoma City, Okla.	295.60	42.25%	\$1.60	30.72%	8.82%
504	Winch Financial	Appleton, Wis.	295.13	15.21%	\$0.37	11.70%	3.14%
505	Wechter Feldman Wealth Management	Parsippany, N.J.	294.65	5.14%	\$1.91	6.50%	-1.28%
506	WFA Wealth Managers	San Diego, Calif.	293.26	9.99%	\$0.95	7.15%	2.66%
507	Pinnacle Financial Group	Western Springs, Ill.	290.96	26.34%	\$1.12	48.21%	-14.75%
508	Next Generation Wealth Management	Milwaukee, Wis.	282.17	17.60%	\$1.09	3.58%	13.54%
509	Magnus Financial Group	New York, N.Y.	280.77	N/A	\$1.04	N/A	N/A
510	Meritas Wealth Management	Larkspur, Calif.	280.23	20.48%	\$1.71	12.40%	7.19%
511	Poehling Capital Management	Madison, Wis.	278.19	27.50%	\$0.74	20.36%	5.93%
512	Duncan Williams Asset Management	Memphis, Tenn.	277.44	88.86%	\$1.06	44.16%	31.00%
513	Heritage Way Advisors	Rockford, Ill.	277.30	60.09%	\$2.02	32.04%	21.24%
514	Integrated Wealth Management	Scottsdale, Ariz.	272.70	7.79%	\$0.78	5.01%	2.64%
515	Apex Financial Advisors	Yardley, Pa.	272.56	56.10%	\$2.67	45.39%	7.37%
516	Portfolio Wealth Advisors	Albuquerque, N.M.	264.27	27.78%	\$1.17	24.94%	2.27%

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517	CTS Financial Group	Chicago, Ill.	264.14	11.92%	\$1.13	5.68%	5.91%
518	Asset Advisory Group	Kinnelon, N.J.	264.10	19.75%	\$2.03	8.70%	10.17%
519	Asset Planning	Cypress, Calif.	262.92	19.37%	\$0.88	8.63%	9.89%
520	Transitions Wealth Management	Greenwood Village, Colo.	262.67	29.97%	\$0.77	18.19%	9.97%
521	McCarthy Asset Management	Redwood Shores, Calif.	262.56	16.47%	\$1.16	11.31%	4.63%
522	Rainier Financial Group	Seattle, Wash.	262.33	108.77%	\$2.19	47.88%	41.18%
523	Carolina Wealth Management	Greenville, N.C.	260.37	20.56%	\$0.64	17.62%	2.50%
524	Mark J. Snyder Financial Services	Medford, N.Y.	253.41	15.49%	\$0.37	-8.44%	26.14%
525	Allodium Investment Consultants	Minneapolis, Minn.	253.31	13.36%	\$1.47	-20.25%	42.15%
526	Navigoe	Redondo Beach, Calif.	253.22	14.63%	\$1.89	6.08%	8.06%
527	Palisade Investments	Stateline, Nev.	252.90	26.77%	\$0.84	6.56%	18.97%
528	Piershale Financial Group	Crystal Lake, Ill.	251.40	15.78%	\$0.63	16.65%	-0.74%
529	Cascade Investment Group	Colorado Springs, Colo.	249.00	24.50%	\$0.55	17.58%	5.88%
530	Branson, Fowlkes & Company	Houston, Texas	247.85	9.46%	\$1.65	9.46%	0.00%
531	MFA Asset Management	Tewksbury, Mass.	247.40	-41.67%	\$2.60	-38.60%	-5.00%
532	Spinnaker Investment Group	Newport Beach, Calif.	246.48	56.25%	\$0.47	33.17%	17.33%
533	QP Consulting	Takoma Park, Md.	245.81	23.13%	\$5.59	14.73%	7.32%
534	Claro Advisors	Boston, Mass.	245.08	32.05%	\$0.67	5.06%	25.68%
535	Wakefield Wealth Management	Englewood, Colo.	244.22	11.10%	\$1.61	7.44%	3.40%
536	Searcy Financial Services	Overland Park, Kan.	241.46	13.53%	\$1.51	13.53%	0.00%
537	Day & Ennis	Macon, Ga.	239.06	20.32%	\$1.12	6.26%	13.23%
538	Reston Wealth Management	Reston, Va.	238.77	13.44%	\$0.59	5.66%	7.37%
539	The Advocates	Houston, Texas	238.22	10.86%	\$1.97	5.36%	5.22%
540	Westover Capital Advisors	Wilmington, Del.	237.12	17.58%	\$1.58	8.18%	8.70%
541	Targeted Financial Services	Holmdel, N.J.	235.39	25.50%	\$0.50	22.85%	2.16%
542	Morris Financial Concepts	Mt. Pleasant, S.C.	234.44	11.89%	\$0.89	15.30%	-2.96%
543	Etesian Wealth Advisors	Lake Oswego, Ore.	232.28	16.37%	\$1.71	6.11%	9.68%
544	Baron Financial Group	Fair Lawn, N.J.	231.47	14.81%	\$0.86	6.31%	8.00%
545	M.C. Byrd Wealth Management	Bellville, Texas	228.10	11.78%	\$0.46	16.97%	-4.44%
546	Burns Matteson Capital Management	Corning, N.Y.	226.62	12.33%	\$1.29	5.94%	6.02%
547	Whitener Capital Management	Rocky Mount, N.C.	226.09	20.45%	\$0.81	36.80%	-11.95%
548	Tiemann Investment Advisors	Menlo Park, Calif.	223.67	10.35%	\$2.66	6.40%	3.70%
549	Anthony Smith Advisors	Atlanta, Ga.	220.04	-27.95%	\$1.52	-21.49%	-8.23%
550	Fortune Wealth Management	Dallas, Texas	219.00	32.43%	\$1.15	28.95%	2.70%
551	Pivotal Planning Group	Jericho, N.Y.	218.76	33.14%	\$1.11	2.73%	29.61%
552	W. A. Smith Financial Group	Sandusky, Ohio	217.92	46.44%	\$0.27	19.23%	22.82%
553	Arbor Wealth Management	Miramar Beach, Fla.	217.84	25.20%	\$0.84	9.18%	14.67%
554	The Lubitz Financial Group	Miami, Fla.	215.83	19.94%	\$1.70	19.00%	0.79%
555	Perspective Wealth Partners	Boise, Idaho	212.89	21.46%	\$1.79	17.38%	3.48%
556	AOG Wealth Management	Great Falls, Va.	212.61	13.40%	\$0.82	9.48%	3.59%
557	Manske Wealth Management	Houston, Texas	212.00	18.30%	\$0.85	15.93%	2.04%
558	Asset Planning Corporation	Knoxville, Tenn.	211.64	16.44%	\$1.13	5.23%	10.65%
559	NCM Capital Management	Ramsey, N.J.	211.00	36.13%	\$2.01	8.90%	25.00%
560	Client 1st Advisory Group	Clearwater, Fla.	210.97	10.32%	\$1.00	5.06%	5.00%
561	Premia Global Advisors	Coral Gables, Fla.	210.89	22.53%	\$4.58	11.87%	9.52%
562	Investment Advisory Professionals	Boca Raton, Fla.	210.70	14.51%	\$2.11	8.79%	5.26%
563	Trinity Financial Advisors	Chicago, Ill.	209.56	5.95%	\$3.33	-2.45%	8.62%
564	Trinity Financial Advisors	Columbus, Ohio	208.94	25.91%	\$1.87	10.17%	14.29%
565	Berno Financial Management	Cincinnati, Ohio	208.70	16.36%	\$1.81	8.26%	7.48%
566	Auour Investments	Wenham, Mass.	207.17	57.73%	\$0.96	16.83%	35.00%
567	SFG Wealth Planning Services	Doylestown, Pa.	207.12	29.62%	\$2.33	19.43%	8.54%
568	Wilsey Asset Management	San Diego, Calif.	206.83	31.11%	\$0.30	-1.86%	33.59%

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FA's 2018 RIA RANKING



2017 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2017 ASSETS (\$MM)*	% GROWTH IN ASSETS 2016-2017	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
569	Alpha Financial Advisors	Charlotte, N.C.	205.81	42.51%	\$1.13	21.37%	17.42%
570	Sentinel Wealth Management	Reston, Va.	205.16	14.80%	\$1.94	8.30%	6.00%
571	Cassady Schiller Wealth Management	Cincinnati, Ohio	204.61	50.28%	\$1.04	31.11%	14.62%
572	Financial Alternatives	La Jolla, Calif.	200.32	22.64%	\$1.82	13.72%	7.84%
573	Precipio Wealth Management	McLean, Va.	200.28	11.56%	\$2.00	11.56%	0.00%
574	Morling Financial Advisors	San Francisco, Calif.	199.66	21.69%	\$0.93	12.02%	8.63%
575	Raskob Kambourian Financial	Tucson, Ariz.	199.00	11.17%	\$1.11	23.59%	-10.05%
576	MDK Financial Group	Houston, Texas	198.99	14.47%	\$0.36	8.23%	5.77%
577	Republic Wealth Advisors	Austin, Texas	197.57	37.29%	\$1.03	25.13%	9.71%
578	Slayton Lewis	Salt Lake City, Utah	195.01	14.50%	\$3.42	14.50%	0.00%
579	Mullooly Asset Management	Wall, N.J.	193.48	29.40%	\$0.29	20.00%	7.83%
580	Tull Financial Group	Chesapeake, Va.	192.34	12.37%	\$0.83	14.79%	-2.11%
581	Evart, Young & Hobbs Investment Management	Redwood City, Calif.	189.91	14.53%	\$0.63	6.90%	7.14%
582	Chessman Wealth Strategies	Dallas, Texas	189.29	5.73%	\$0.81	-0.60%	6.36%
583	Miller Advisors	Kirkland, Wash.	189.13	16.83%	\$0.94	13.94%	2.54%
584	Sard Wealth Management Group	Atlanta, Ga.	186.44	16.59%	\$1.17	40.64%	-17.10%
585	Ledge Wealth Mangement	Sartell, Minn.	182.28	98.24%	\$0.85	42.92%	38.71%
586	Legacy Consulting Group	Plano, Texas	181.39	10.96%	\$1.33	6.07%	4.62%
587	Kercheville Advisors	San Antonio, Texas	180.55	36.61%	\$0.67	1.57%	34.50%
588	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	179.64	17.64%	\$0.63	3.50%	13.65%
589	Harbor Financial Group	Boulder, Colo.	178.74	13.56%	\$1.34	5.87%	7.26%
590	Maltin Wealth Management	Paramus, N.J.	177.95	21.76%	\$1.42	21.76%	0.00%
591	National Wealth Management	Florham Park, N.J.	177.86	-0.02%	\$0.83	21.84%	-17.94%
592	Fiduciary Wealth Management	Alexandria, Va.	177.51	56.72%	\$0.89	38.61%	13.07%
593	Advisors Financial	Vienna, Va.	174.05	60.47%	\$0.94	56.14%	2.78%
594	Marrs Wealth Management	Ames, Iowa	172.16	14.92%	\$0.64	10.66%	3.85%
595	Life Planning Partners	Jacksonville, Fla.	171.21	17.04%	\$1.95	10.39%	6.02%
596	Samalin Investment Counsel	Chappaqua, N.Y.	170.20	12.44%	\$0.77	16.51%	-3.49%
597	Madrona Financial Services	Everett, Wash.	166.00	34.96%	\$0.30	25.14%	7.84%
598	Fidato Wealth	Strongsville, Ohio	165.69	45.25%	\$0.57	28.22%	13.28%
599	Professional Financial Strategies	Pittsford, N.Y.	164.40	18.34%	\$1.66	18.34%	0.00%
600	JVL Associates	Wyoming, Mich.	163.00	6.25%	\$4.29	-10.53%	18.75%
601	Wealthview Capital	Jackson, Miss.	163.00	18.12%	\$1.02	18.12%	0.00%
602	Barnett Financial	Austin, Texas	161.96	13.79%	\$2.49	15.54%	-1.52%
603	Robert Gordon & Associates	Springfield, Ill.	161.00	15.00%	\$0.27	5.42%	9.09%
604	Clarity Asset Management	Ames, Iowa	158.79	13.26%	\$0.75	12.20%	0.95%
605	TL Private Wealth	Southlake, Texas	158.00	92.23%	\$1.44	18.83%	61.76%
606	Vermillion Financial Advisors	South Barrington, Ill.	157.13	14.15%	\$0.85	1.74%	12.20%
607	Clear Point Advisors	Melville, N.Y.	156.00	9.47%	\$1.05	-0.15%	9.63%
608	Mendel Money Management	Northbrook, Ill.	155.81	8.52%	\$1.02	4.98%	3.38%
609	Charleston Financial Advisors	Charleston, S.C.	153.76	13.81%	\$0.85	-5.79%	20.81%
610	Centerline Wealth Advisors	Louisville, Ky.	152.96	22.59%	\$0.77	17.64%	4.21%
611	Empyryon Wealth Management	Roseville, Calif.	151.95	0.34%	\$1.85	-4.56%	5.13%
612	Sebold Capital Management	Naperville, Ill.	151.90	18.41%	\$1.42	28.37%	-7.76%
613	Sharper & Granite	El Segundo, Calif.	151.24	17.70%	\$1.84	3.34%	13.89%
614	Oak Advisors	Hilton Head Island, S.C.	151.00	7.86%	\$1.08	4.01%	3.70%
615	Bonner & Smith	Lubbock, Texas	150.90	17.87%	\$0.73	7.67%	9.47%
ASSET CATEGORY: \$100 million to <\$150 million							
616	Fi3 Financial Advisors	Indianapolis, Ind.	149.06	57.45%	\$2.48	10.21%	42.86%
617	Garner Financial Management	Lafayette, Calif.	147.69	13.78%	\$0.91	5.35%	8.00%
618	Castleview Wealth Advisors	Oklahoma City, Okla.	146.75	31.11%	\$1.18	5.73%	24.00%
619	Andrews Advisory Associates	Honolulu, Hawaii	146.69	10.74%	\$0.68	3.59%	6.90%

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FA's 2018 RIA RANKING



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620	Moier Capital Management	Irvine, Calif.	145.19	17.77%	\$2.10	14.35%	2.99%
621	Siligmueeller & Norvid Wealth Advisors	Glen Ellyn, Ill.	144.09	20.07%	\$1.76	11.29%	7.89%
622	Kemp Financial Management	Fullerton, Calif.	144.00	13.83%	\$1.01	8.26%	5.15%
623	Crossgate Wealth Advisors	Yardley, Pa.	142.18	13.10%	\$1.19	15.00%	-1.65%
624	Vital Wealth Management	Rosemont, Ill.	141.91	N/A	\$0.99	N/A	3.60%
625	Mighty Oak Strong America Investment Co. (MOSAIC)	Mechanicsburg, Pa.	141.87	23.96%	\$1.01	-2.60%	27.27%
626	TABR Capital Management	Orange, Calif.	140.64	11.96%	\$0.60	9.58%	2.17%
627	Joule Financial	Lexington, Ky.	139.54	62.74%	\$0.33	43.59%	13.33%
628	Financial Management Concepts	Winter Springs, Fla.	138.20	10.34%	\$1.05	1.98%	8.20%
629	Investor's Capital Management	Menlo Park, Calif.	136.88	25.42%	\$2.04	16.06%	8.06%
630	Mission Creek Capital Partners	San Francisco, Calif.	136.11	48.05%	\$0.93	11.54%	32.73%
631	Private Capital Management	Larkspur, Calif.	135.00	8.00%	\$2.93	-1.39%	9.52%
632	Artemis Financial Advisors	Boston, Mass.	133.00	25.70%	\$3.50	5.85%	18.75%
633	Asset Management Resources	Hyannis, Mass.	132.50	31.75%	\$0.49	27.82%	3.08%
634	Petra Financial Advisors	Colorado Springs, Colo.	132.46	10.11%	\$0.96	-0.26%	10.40%
635	Euclid Investment Advisory	Bethesda, Md.	132.00	-19.02%	\$2.75	-25.77%	9.09%
636	Falcon Wealth Planning	Ontario, Calif.	132.00	103.08%	\$0.38	16.04%	75.00%
637	Veripax Wealth Management	Folsom, Calif.	131.50	25.24%	\$0.73	11.32%	12.50%
638	Inspire Investing	Hollister, Calif.	130.85	134.29%	\$0.33	77.50%	32.00%
639	Royal Capital Management	Boca Raton, Fla.	127.95	8.74%	\$1.02	-12.14%	23.76%
640	WealthCrest Financial Services	Springfield, Va.	126.94	17.22%	\$0.73	-12.92%	34.62%
641	Wealthway Financial Advisors	Norfolk, Va.	125.00	27.55%	\$0.66	24.19%	2.70%
642	Summit Place Financial Advisors	Summit, N.J.	124.70	12.96%	\$6.23	7.31%	5.26%
643	Clay Northam Wealth Management	Seal Beach, Calif.	124.10	15.87%	\$0.40	12.14%	3.33%
644	Trisperity Advisors	Katy, Texas	123.28	23.15%	\$0.78	4.56%	17.78%
645	Cathy Pareto And Associates	Coral Gables, Fla.	122.27	45.38%	\$0.96	27.20%	14.29%
646	Shira Ridge Wealth Management	Larkspur, Calif.	122.26	66.34%	\$0.72	48.73%	11.84%
647	Hixon Zuercher Capital Management	Findlay, Ohio	122.05	33.59%	\$0.51	19.05%	12.21%
648	Ivy League Financial Advisors	Rockville, Md.	121.76	8.74%	\$1.18	7.69%	0.98%
649	Beacon Financial Advisors	Rye Brook, N.Y.	120.74	3.44%	\$2.87	5.91%	-2.33%
650	Pauley Financial	Austin, Texas	112.82	4.08%	\$1.41	0.17%	3.90%
651	Ron Beaton's Money Matters	Paducah, Ky.	108.35	15.31%	\$1.78	15.31%	0.00%
652	Caissa Wealth Strategies	Minneapolis, Minn.	104.00	19.92%	\$1.49	4.50%	14.75%
653	Gold Medal Waters	Boulder, Colo.	104.00	18.18%	\$0.90	6.88%	10.58%
654	Integrated Capital Management	Bloomfield Hills, Mich.	103.29	26.22%	\$0.40	19.35%	5.76%
655	Paragon Wealth Management	Provo, Utah	102.79	8.29%	\$0.76	7.50%	0.74%
656	Purtill Financial	Highland Heights, Ohio	102.45	12.08%	\$0.69	1.48%	10.45%
657	HCO Private Wealth	Roanoke, Va.	101.85	0.00%	\$0.93	0.00%	0.00%
658	RHS Financial	San Francisco, Calif.	100.29	42.66%	\$0.99	28.54%	10.99%
659	Hanseatic Management Services	Albuquerque, N.M.	100.00	-49.24%	\$1.45	-74.99%	102.94%
ASSET CATEGORY: <\$100 million							
660	Focus Financial Advisors	Rockford, Ill.	99.71	-14.98%	\$0.59	-16.50%	1.82%
661	BCK Partners	Corning, N.Y.	97.00	29.53%	\$0.72	16.10%	11.57%
662	Flagship Capital Management	Media, Pa.	94.50	7.39%	\$0.83	96.88%	-45.45%
663	Atwater Wealth Management	Boston, Mass.	87.43	35.04%	\$1.11	29.92%	3.95%
664	Murphy Capital Advisors	Goodyear, Ariz.	85.81	15.67%	\$1.11	6.66%	8.45%
665	Hammond Iles Wealth Advisors	Wethersfield, Conn.	83.78	-44.31%	\$0.13	-47.73%	6.55%
666	Elderado Financial	Montrose, Colo.	83.49	16.59%	\$0.37	8.82%	7.14%
667	Sage Future Financial	Albuquerque, N.M.	83.34	8.45%	\$2.19	2.74%	5.56%
668	Lighthouse Wealth Management	Ashland, Ohio	81.03	14.54%	\$0.28	19.69%	-4.30%
669	Northvest	Keene, N.H.	80.00	12.68%	\$1.70	12.68%	0.00%
670	D.M. Brenner	Solana Beach, Calif.	75.00	25.00%	\$0.68	13.64%	10.00%

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671	Brighton Financial Planning	Clinton, N.J.	69.70	4.76%	\$0.76	4.76%	0.00%
672	Kotys Wealth Professionals	Valparaiso, Ind.	68.65	16.75%	\$0.30	15.21%	1.33%
673	Steward Advisors	Chicago, Ill.	66.27	66.44%	\$1.27	50.43%	10.64%
674	Chilmark Financial Advisors	MIAMI, Fla.	63.10	12.19%	\$0.93	10.54%	1.49%
675	Parr Financial Solutions	Columbia, Md.	62.62	21.83%	\$1.57	12.69%	8.11%
676	Proficient Wealth Counselors	Norwood, Mass.	59.82	7.48%	\$0.42	-0.85%	8.40%
677	Waverley Wealth Management	Mountain View, Calif.	56.77	35.69%	\$0.71	27.21%	6.67%
678	Ark Royal Wealth Management	Raleigh, N.C.	55.40	24.22%	\$1.91	7.08%	16.00%
679	Financial Perspectives	San Ramon, Calif.	55.17	-1.38%	\$0.55	-11.24%	11.11%
680	Collie Financial Planning	Asheville, N.C.	53.00	18.30%	\$0.40	1.53%	16.52%
681	Sommers Financial Management	St. Helens, Ore.	51.62	21.81%	\$0.19	7.62%	13.19%
682	Wealth Security	AUSTIN, Texas	49.72	13.29%	\$1.24	-15.04%	33.33%
683	Meritas Advisors	San Rafael, Calif.	46.00	27.78%	\$0.92	7.33%	19.05%
684	Synergy Wealth Management	Grand Rapids, Mich.	45.25	32.45%	\$0.23	7.29%	23.46%
685	Safe Harbor Asset Management	Huntington, N.Y.	44.49	26.85%	\$0.73	18.53%	7.02%
686	Kuettel Capital	Bentonville, Ark.	43.08	31.65%	\$0.28	-19.31%	63.16%
687	Horizons Planning Corporation	Ann Arbor, Mich.	37.50	26.69%	\$0.30	3.56%	22.33%
688	Resonance Financial	Austin, Texas	37.09	8.55%	\$2.47	-13.16%	25.00%
689	Jepson Financial Advisors	Caribou, Maine	36.74	6.47%	\$0.35	5.45%	0.97%
690	Timmons Wealth Management	Attleboro, Mass.	35.66	25.03%	\$0.51	10.74%	12.90%
691	Cline Financial Concepts	Champaign, Ill.	33.00	41.28%	\$0.33	-12.41%	61.29%
692	Shriver Investments	Parker, Colo.	27.57	11.15%	\$0.39	4.80%	6.06%
693	Private Client Wealth Advisors	Denver, Colo.	25.50	24.39%	\$0.51	-0.49%	25.00%
694	Integrated Retirement Strategies	Oregon City, Ore.	24.79	12.85%	\$0.85	20.64%	-6.45%
695	3Sisters Sustainable Management	Philadelphia, Pa.	23.46	-33.60%	\$0.81	-31.31%	-3.33%
696	New Castle Investment Advisors	Portsmouth, N.H.	16.52	7.99%	\$1.18	-22.87%	40.00%
697	Coastal Management Group	Narragansett, R.I.	16.00	5.96%	\$1.07	-1.10%	7.14%
698	Advisors Financial Planning Group	Gilford, N.H.	15.00	18.11%	\$0.18	4.21%	13.33%
699	Dukes Financial Group	Charlotte, N.C.	10.29	20.38%	\$0.69	28.41%	-6.25%
700	Lindy S Diamond Personal Financial Services	San Marcos, Calif.	6.17	30.23%	\$0.62	56.28%	-16.67%
701	Friedentag Portfolio Management	Denver, Colo.	6.00	14.51%	\$0.30	25.96%	-9.09%
702	Carthage Financial Group	Quincy, Mass.	3.90	77.27%	\$0.09	93.76%	-8.51%
703	THE RULE Wealth Management	Louisville, Ohio	3.89	2.48%	\$0.05	2.48%	0.00%
704	Atherean Wealth Management	Jersey City, N.J.	2.94	16.27%	\$0.15	4.64%	11.11%
705	Vassalotti Investment Management Corp (VIMCOR)	Duncansville, Pa.	2.13	25.16%	\$0.04	4.30%	20.00%
706	Minneapolis Portfolio Management Group	Minneapolis, Minn.	1.07	31.51%	\$0.00	25.53%	4.76%
707	Ferrell Wealth Management	Winter Park, Fla.	0.43	13.33%	\$0.00	2.00%	11.11%

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TOP 50 FASTEST-GROWING FIRMS

With More
Than \$250 Million
in AUM

GROWTH RANK	FIRM NAME	LOCATION	2017 CLIENTS	YEAR END 2017 ASSETS (\$MM)	% GROWTH IN ASSETS 2016-2017	% GROWTH IN ASSETS PER CLIENT
1	Cabana (dba Cabana Asset Management) †	Fayetteville, Ark.	2,298	301.19	926.66%	9.46%
2	AE Wealth Management	Topeka, Kan.	13,123	2,759.05	303.64%	72.61%
3	Per Stirling Capital Management	Austin, Texas	739	622.35	179.12%	39.75%
4	Lucia Capital Group	San Diego, Calif.	3,725	1,368.94	175.33%	100.31%
5	Inspire Investing	Hollister, Calif.	396	130.85	134.29%	77.50%
6	Brightworth	Atlanta, Ga.	1,300	3,334.40	133.02%	14.72%
7	Kingsview Asset Management	Grants Pass, Ore.	4,500	801.38	113.33%	65.93%
8	HoyleCohen	San Diego, Calif.	1,121	1,728.22	109.96%	-3.54%
9	Rainier Financial Group	Seattle, Wash.	120	262.33	108.77%	47.88%
10	Duncan Williams Asset Management	Memphis, Tenn.	262	277.44	88.86%	44.16%
11	Trilogy Capital	Huntington Beach, Calif.	5,431	658.23	87.79%	-22.13%
12	CIBC Atlantic Trust Private Wealth Management	Atlanta, Ga.	6,818	18,733.80	85.36%	12.01%
13	Altium Wealth Management	Purchase, N.Y.	675	911.42	82.46%	62.19%
14	Belpointe Asset Management	Greenwich, Conn.	2,957	1,016.56	77.79%	3.41%
15	Fulcrum Capital	Seattle, Wash.	75	479.46	72.55%	24.24%
16	Virtue Capital Management	Brentwood, Tenn.	4,716	340.36	71.48%	7.49%
17	Aurum Wealth Management	Mayfield Village, Ohio	741	860.00	70.43%	-47.79%
18	HM Capital Management	Clayton, Mo.	101	2,441.73	64.59%	54.81%
19	Joule Financial	Lexington, Ky.	425	139.54	62.74%	43.59%
20	Lido Advisors	Los Angeles, Calif.	900	2,772.83	60.64%	16.02%
21	Heritage Way Advisors	Rockford, Ill.	137	277.30	60.09%	32.04%
22	Bitterroot Capital Advisors	Bozeman, Mont.	15	1,083.11	59.90%	49.24%
23	Elser Financial Planning	Indianapolis, Ind.	147	300.02	59.70%	32.54%
24	Auour Investments	Wenham, Mass.	216	207.17	57.73%	16.83%
25	RMB Capital Management	Chicago, Ill.	1,683	8,226.71	57.54%	39.19%
26	Greenspring Advisors	Towson, Md.	408	3,228.44	57.13%	39.42%
27	6 Meridian	Wichita, Kan.	580	1,427.83	56.79%	17.32%
28	Fiduciary Wealth Management	Alexandria, Va.	199	177.51	56.72%	38.61%
29	Massey Quick Simon	Morristown, N.J.	270	3,027.74	56.59%	18.89%
30	Apex Financial Advisors	Yardley, Pa.	102	272.56	56.10%	45.39%
31	The Mather Group	Chicago, Ill.	897	1,512.14	55.12%	24.51%
32	Mercer Global Advisors	Santa Barbara, Calif.	7,147	11,053.47	51.95%	27.76%
33	Gradient Investments	Arden Hills, Minn.	10,829	1,903.05	51.26%	24.83%
34	Ritholtz Wealth Management	New York, N.Y.	575	708.00	49.68%	10.64%
35	Tiedemann Advisors	New York, N.Y.	452	12,301.60	49.57%	44.94%
36	Genovese Burford & Brothers	Sacramento, Calif.	1,174	2,019.02	46.69%	21.20%
37	SAX Wealth Advisors	Clifton, N.J.	673	895.33	45.96%	7.79%
38	Versant Capital Management	Phoenix, Ariz.	383	909.28	45.81%	-23.86%
39	Investmark Advisory Group	Stratford, Conn.	538	444.96	44.47%	34.26%
40	TFO-TDC	Maumee, Ohio	1,321	2,375.25	44.12%	45.75%
41	Creative Planning	Leawood, Kan.	20,500	32,017.25	44.01%	8.88%
42	Cahaba Wealth Management	Atlanta, Ga.	464	580.36	43.61%	27.83%
43	Capital Wealth Planning	Naples, Fla.	2,200	930.00	43.08%	0.80%
44	AJ Wealth	New York, N.Y.	173	764.00	42.35%	7.79%
45	Ensemble Capital Management	Burlingame, Calif.	148	718.47	42.26%	24.96%
46	Align Wealth Management	Oklahoma City, Okla.	185	295.60	42.25%	30.72%
47	Vivaldi Capital Management	Chicago, Ill.	537	1,205.68	41.70%	5.55%
48	Vestory	Bellevue, Wash.	644	417.04	41.67%	18.57%
49	Financial Management Strategies	Valley View, Ohio	1,070	375.24	41.11%	5.11%
50	Rand & Associates	San Francisco, Calif.	325	1,300.00	40.54%	29.73%

† Firm had significant increase in sub-advisory money management business.

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