

TOP 150 RIA FIRMS

RANK	FIRM NAME	LOCATION	AUM (000)	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
1	Chevy Chase Trust Company	Bethesda, Md.	\$33,997,884	4,055	33	90
2	Moneta Group Investment Advisors	St. Louis	\$20,257,469	25,379	120	300
3	Mercer Global Advisors	Denver	\$15,848,966	32,709	265	403
4	Capital Strategies Investment Group	Oakbrook Terrace, Ill.	\$15,713,795	1,194	4	20
5	Oxford Financial Group	Carmel, Ind.	\$13,097,234	9,273	31	113
6	Personal Capital Advisors Corporation	San Francisco	\$12,240,728	62,594	164	247
7	Advanced Research Investment Solutions	Los Angeles	\$12,072,556	88	3	7
8	Guided Choice Asset Management	San Diego	\$11,910,338	170,472	0	16
9	Pathstone	Englewood, N.J.	\$10,251,422	5,660	31	113
10	Loring, Wolcott & Coolidge Fiduciary Advisors	Boston	\$9,016,820	2,902	11	95
11	WE Family Offices	Miami	\$8,537,565	78	25	47
12	Ballentine Partners	Waltham, Mass.	\$7,927,997	4,374	56	79
13	Americh Massena	Portland, Ore.	\$7,177,257	328	7	50
14	IRA Group	Atlanta	\$7,044,548	464	7	10
15	EP Wealth Advisors	Torrance, Calif.	\$6,930,000	13,238	62	160
16	CV Advisors	Aventura, Fla.	\$6,810,504	926	0	45
17	Mill Creek Capital Advisors	Conshohocken, Pa.	\$6,729,368	336	25	32
18	Savant Capital Management	Rockford, Ill.	\$6,688,128	5,253	79	174
19	Athena Capital Advisors	Lincoln, Mass.	\$6,253,700	438	19	47
20	Pinnacle Associates	New York	\$6,245,050	4,417	17	56
21	LSIA	Bloomfield Hills, Mich.	\$6,030,379	632	8	14
22	East End Advisors	New York	\$6,010,695	32	0	16
23	Ferguson Wellman Capital Management	Portland, Ore.	\$5,961,638	3,156	24	51
24	Conrad Siegel Investment Advisors	Harrisburg, Pa.	\$5,834,056	616	26	26
25	Clearstead	Cleveland	\$5,777,114	3,099	7	80

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26	Heck Capital Advisors	Rhineland, Wis.	\$5,710,105	2,888	13	18
27	Brownson, Rehms & Foxworth	Chicago	\$5,570,744	3,973	35	40
28	The Bollard Group	Boston	\$5,570,525	580	1	32
29	Arlington Partners	Birmingham, Ala.	\$5,421,911	707	10	27
30	Wetherby Asset Management	San Francisco	\$5,340,919	3,763	28	69
31	Clear Investment Research	Alpharetta, Ga.	\$5,241,176	134	3	6
32	Seven Post Investment Office	San Francisco	\$5,215,179	168	11	18
33	Choate Investment Advisors	Boston	\$5,146,991	2,371	4	14
34	Altair Advisers	Chicago	\$5,097,476	718	0	54
35	Orgel Wealth Management	Altoona, Wis.	\$5,068,194	7,797	10	50
36	Ropes Wealth Advisors	Boston	\$5,013,721	2,693	10	36
37	Fiduciary Investment Advisors	Windsor, Conn.	\$4,978,415	224	31	60
38	Gofen And Glossberg	Chicago	\$4,968,004	3,218	13	35
39	Valeo Financial Advisors	Indianapolis	\$4,922,455	11,351	53	62
40	Regentatlantic	Morristown, N.J.	\$4,900,760	1,851	34	67
41	R M Davis	Portland, Maine	\$4,856,533	5,108	18	47
42	Iron Capital Advisors	Atlanta	\$4,838,057	177	2	6
43	Dowling & Yahnke	San Diego	\$4,730,371	4,490	23	54
44	Finaccess Advisors	Miami	\$4,711,487	155	11	15
45	Greenspring Advisors	Towson, Md.	\$4,689,199	1,827	16	22
46	Evanson Asset Management	Carmel, Calif.	\$4,640,476	4,881	6	6
47	B O S	San Francisco	\$4,627,347	3,471	30	44
48	Permanens Capital	New York	\$4,625,575	80	0	15
49	Balasa Dinverno Foltz	Itasca, Ill.	\$4,595,063	5,734	42	45
50	Plancorp	Saint Louis	\$4,538,741	6,463	33	65

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51	Marcuard Family Office	Zurich	\$4,449,352	287	0	28
52	RGT Wealth Advisors	Dallas	\$4,335,439	4,059	23	56
53	Sullivan, Bruyette, Speros & Blayney	Mclean, Va.	\$4,294,682	4,259	31	66
54	Camden Capital	El Segundo, Calif.	\$4,089,066	3,645	14	26
55	Index Fund Advisors	Irvine, Calif.	\$4,042,587	6,519	16	41
56	Brightworth	Atlanta	\$4,034,376	6,984	27	64
57	Northwest Capital Management	Portland, Ore.	\$3,976,186	1,133	8	15
58	Cornerstone Advisors	Bellevue, Wash.	\$3,960,600	4,178	35	55
59	WMA Partners	Towson, Md.	\$3,956,943	567	23	63
60	Aureus Asset Management	Boston	\$3,833,825	580	3	12
61	The Mather Group	Chicago	\$3,684,522	6,394	40	72
62	TCG Advisors	Austin, Texas	\$3,602,908	1,774	15	99
63	Kore Private Wealth	New York	\$3,571,189	3,047	5	17
64	Alesco Advisors	Pittsford, N.Y.	\$3,540,630	1,263	1	21
65	Sepio Capital	San Francisco	\$3,526,857	1,382	16	19
66	Inverness Counsel	New York	\$3,523,370	1,189	0	36
67	Adviceperiod	Los Angeles	\$3,467,736	3,607	56	78
68	Karpus Investment Management	Pittsford, N.Y.	\$3,443,416	2,237	1	35
69	Truepoint	Cincinnati	\$3,377,150	6,095	26	64
70	R H Bluestein	Birmingham, Mich.	\$3,374,452	1,641	8	25
71	JMG Financial Group	Downers Grove, Ill.	\$3,327,423	3,202	28	53
72	Mozaic	Beverly Hills, Calif.	\$3,326,771	67	0	13
73	Northeast Financial	Westport, Conn.	\$3,319,705	1,327	2	8
74	Anchor Capital Advisors	Boston	\$3,260,497	4,192	18	47
75	Clifford Swan Investment Counselors	Pasadena, Calif.	\$3,253,015	2,392	11	28

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76	Zhang Financial	Portage, Mich.	\$3,217,727	4,372	9	31
77	Badgley Phelps Wealth Managers	Seattle	\$3,195,692	1,726	17	20
78	Parallel Advisors	San Francisco	\$3,168,592	7,409	34	58
79	Lamco Advisory Services	Lake Mary, Fla.	\$3,154,634	657	6	14
80	Smith Shellnut Wilson	Ridgeland, Miss.	\$3,093,798	584	8	13
81	Prio Wealth Limited Partnership	Boston	\$3,088,616	1,521	11	27
82	Westmount Asset Management	Los Angeles	\$3,062,871	4,037	16	30
83	Mccutchen Group	Seattle	\$3,006,187	969	0	21
84	Parsec Financial	Asheville, N.C.	\$2,992,247	5,799	37	64
85	TCI Wealth Advisors	Tucson, Ariz.	\$2,973,413	8,203	25	70
86	Advance Capital Management	Southfield, Mich.	\$2,955,347	10,734	25	49
87	HM Capital Management	Clayton, Moss.	\$2,951,904	572	6	8
88	CM Wealth Advisors	Beachwood, Ohio	\$2,937,698	500	3	21
89	Matter Family Office	Clayton, Mo.	\$2,909,777	216	13	38
90	Twin Focus Capital Partners	Boston	\$2,889,113	103	21	31
91	Boston Financial Management	Boston	\$2,846,901	2,147	20	42
92	Hamilton Capital	Columbus, Ohio	\$2,813,696	6,456	44	58
93	Heritage Investors Management Corp	Bethesda, Md.	\$2,791,860	1,259	7	15
94	F L Putnam Investment Management	Wellesley, Mass.	\$2,785,373	2,958	25	47
95	Corient Capital Partners	Newport Beach, Calif.	\$2,780,257	3,312	10	21
96	Destination Wealth Management	Walnut Creek, Calif.	\$2,752,282	4,700	30	50
97	Modera Wealth Management	Westwood, N.J.	\$2,746,157	5,711	39	64
98	Sym Financial Advisors	Winona Lake, Ind.	\$2,743,371	3,662	25	57
99	Budros, Ruhlin & Roe	Columbus, Ohio	\$2,732,675	6,455	28	40
100	Abacus Wealth Partners	Santa Monica, Calif.	\$2,725,665	5,704	48	64

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101	Berman Capital Advisors	Atlanta	\$2,719,355	773	16	27
102	Sand Hill Global Advisors	Palo Alto, Calif.	\$2,708,891	1,519	13	29
103	Roosevelt Investments	New York	\$2,697,235	4,710	6	33
104	Mainstay Capital Management	Grand Blanc, Mich.	\$2,675,672	3,653	17	26
105	MRA Associates	Phoenix	\$2,643,529	2,424	27	56
106	Willis Investment Counsel	Gainesville, Ga	\$2,612,436	309	6	13
107	Southeast Asset Advisors	Thomasville, Ga.	\$2,543,111	1,066	8	14
108	Halbert Hargrove	Long Beach, Calif.	\$2,539,397	3,682	33	44
109	Palladium Registered Investment Advisors	Norfolk, Va.	\$2,532,264	2,243	11	29
110	Evergreen Capital Management	Bellevue, Wash.	\$2,530,696	1,795	17	32
111	Waldron Private Wealth	Bridgeville, Pa.	\$2,508,922	223	28	28
112	Paul Comstock Partners	Houston	\$2,469,605	126	9	9
113	Dyson Capital Advisors	Alexandria, Va.	\$2,465,405	47	3	22
114	Interocean Capital	Chicago	\$2,452,885	3,106	11	18
115	Carnegie Investment Counsel	Pepper Pike, Ohio	\$2,445,156	2,115	33	49
116	Balentine	Atlanta	\$2,445,125	2,228	1	40
117	Exencial Wealth Advisors	Oklahoma City, Okla.	\$2,368,967	3,544	25	55
118	Foster Group	West Des Moines, Iowa	\$2,348,986	3,987	27	56
119	Wharton Business Group	Malvern, Pa.	\$2,345,203	111	3	5
120	Congress Wealth Management	Boston	\$2,332,213	2,484	14	28
121	Accredited Investors Wealth Management	Edina, Minn.	\$2,297,527	3,961	4	46
122	Private Ocean	San Rafael, Calif.	\$2,294,500	3,719	22	53
123	Heritage Wealth Advisors	Richmond, Va.	\$2,269,446	1,179	13	26
124	Pure Financial Advisors	San Diego	\$2,266,650	9,418	26	71
125	Water Oak Advisors	Winter Park, Fla.	\$2,246,113	2,020	11	16

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126	Beaumont Financial Partners	Needham, Mass.	\$2,222,592	2,823	14	24
127	Pagnatokarp Partners	Reston, Va.	\$2,204,970	2,621	9	27
128	Sage Financial Group	West Conshohocken, Pa.	\$2,195,381	2,978	14	22
129	Steele Capital Management	Dubuque, Iowa	\$2,173,351	3,586	9	11
130	Pinnacle Advisory Group	Columbia, Md.	\$2,135,909	5,840	20	48
131	Nextcapital Advisers	Chicago	\$2,129,384	20,527	1	25
132	New England Private Wealth Advisors	Wellesley, Mass.	\$2,121,078	2,457	7	18
133	Wescott Financial Advisory Group	Philadelphia	\$2,120,521	1,932	17	32
134	Dynamic Wealth Advisors	Phoenix	\$2,116,729	8,036	61	89
135	Evensky & Katz/Foldes Financial Wealth Management	Coral Gables, Fla.	\$2,096,140	4,399	20	30
136	Andersen	Mclean, Va.	\$2,088,213	344	10	1010
137	Envoi	Minneapolis	\$2,065,318	1,168	8	14
138	Logan Capital Management	Newtown Square, Pa.	\$2,059,687	1,456	17	37
139	The Burney Company	Reston, Va.	\$2,055,696	4,233	0	42
140	Geowalth Management	Chicago	\$2,048,089	12,601	10	29
141	Chicago Capital	Chicago	\$2,043,963	1,193	5	7
142	The Clarius Group	Seattle	\$2,039,356	568	8	21
143	Morton Capital Management	Calabasas, Calif.	\$2,036,505	2,749	0	40
144	IWP Wealth Management	Denver	\$2,031,525	50	9	21
145	Resource Consulting Group	Orlando, Fla.	\$2,030,370	2,283	14	27
146	Team Hewins	Redwood City, Calif.	\$2,023,288	1,086	15	24
147	Filament	Seattle	\$2,005,481	527	11	15
148	JNB Advisors	Albany, N.Y.	\$2,003,630	1,023	3	32
149	Cardiff Park Advisors	San Marcos, Calif.	\$1,995,181	2,190	1	5
150	Retirement Income Solutions	Ann Arbor, Mich.	\$1,966,617	1,204	11	18

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