

RIA LEADERS 2021

TOP 150 FEE-ONLY RIAs IN AUM

2021 rank	FIRM NAME	LOCATION	AUM	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
1	Financial Engines Advisors	Santa Clara, CA	\$260,100,000,000	1,293,354	590	1,489
2	Fisher Investments	Camas, WA	\$159,611,530,686	84,394	1493	2,329
3	Creative Planning	Overland Park, KS	\$75,589,120,012	44,959	413	610
4	Chevy Chase Trust	Bethesda, MD	\$35,867,217,775	1,097	31	97
5	Fiducient Advisors	Chicago, IL	\$28,304,259,860	1,038	29	172
6	Moneta Group Investment Advisors	St. Louis, MO	\$27,417,700,987	5,444	145	370
7	Comprehensive Financial Management	Los Gatos, CA	\$22,758,025,923	39	0	33
8	TD Ameritrade Investment Management	Omaha, NE	\$22,296,147,352	168,719	23	23
9	Pathstone	Englewood, NJ	\$19,598,088,292	1,015	65	198
10	Veritable	Newtown Square, PA	\$17,635,674,729	381	30	84
11	Capital Strategies Investment Group	Oakbrook Terrace, IL	\$17,398,632,253	282	5	20
12	Bahl & Gaynor	Cincinnati, OH	\$16,408,936,565	765	0	29
13	Personal Capital Advisors	San Francisco, CA	\$16,150,573,227	25,704	193	289
14	Oxford Financial Group	Carmel, IN	\$14,819,498,058	684	35	117
15	Boston Private Wealth	Boston, MA	\$14,427,653,173	3,189	67	144
16	Advanced Research Investment Solutions	Los Angeles, CA	\$12,752,266,498	102	3	7
17	FCI Advisors	Overland Park, KS	\$12,404,221,285	4,617	38	65
18	Baker Street Advisors	San Francisco, CA	\$11,800,000,000	434	0	48
19	Cresset Asset Management	Chicago, IL	\$11,677,076,288	550	69	146
20	IEQ Capital	Foster City, CA	\$11,591,748,729	784	39	71
21	EP Wealth Advisors	Torrance, CA	\$11,225,000,000	6,432	62	160
22	Wealthspire Advisors	New York, NY	\$10,943,379,771	3,337	82	144
23	Loring, Wolcott & Coolidge Fiduciary Advisors	Boston, MA	\$10,566,010,436	3,054	12	96
24	Eaton Vance Wateroak Advisors	Boston, MA	\$10,364,186,929	5,265	14	68
25	We Family Offices	Miami, FL	\$10,200,640,735	132	29	46

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26	Evercore Wealth Management	New York, NY	\$10,166,559,382	680	3	80
27	Mycio Wealth Partners	Philadelphia, PA	\$9,913,015,185	798	34	48
28	Savant Wealth Management	Rockford, IL	\$9,591,019,191	6,580	89	205
29	Fiduciary Counselling	St Paul, MN	\$9,116,006,224	1,608	18	76
30	Homrich Berg	Atlanta, GA	\$8,929,223,000	2,517	49	125
31	Ballentine Partners	Waltham, MA	\$8,673,380,006	239	60	85
32	Brighton Jones	Seattle, WA	\$8,443,257,340	2,272	106	150
33	Mill Creek Capital Advisors	Conshohocken, PA	\$8,050,914,709	392	25	35
34	Johnson Wealth	Milwaukee, WI	\$7,968,761,778	892	55	105
35	Arnerich Massena	Portland, OR	\$7,892,100,460	324	7	46
36	Shepherd Kaplan Krochuk	Boston, MA	\$7,751,272,639	138	8	48
37	CV Advisors	Aventura, FL	\$7,660,773,107	82	0	47
38	IRA Group	Atlanta, GA	\$7,620,749,433	207	8	11
39	Bartlett & Co. Wealth Management	Cincinnati, OH	\$7,189,167,636	1,924	28	67
40	Clearstead; Hartland	Cleveland, OH	\$7,162,977,375	822	7	91
41	Ferguson Wellman Capital Management	Portland, OR	\$6,854,828,294	884	22	49
42	Pinnacle Associates	New York, NY	\$6,657,766,030	2,161	17	58
43	Wetherby Asset Management	San Francisco, CA	\$6,572,333,559	612	26	70
44	Churchill Management Group	Los Angeles, CA	\$6,566,607,331	7,126	39	57
45	Valeo Financial Advisors	Carmel, IN	\$6,391,630,633	1,966	61	99
46	Ropes Wealth Advisors	Boston, MA	\$6,331,323,298	1,213	10	33
47	East End Advisors	New York, NY	\$6,297,197,144	18	0	17
48	Welch & Forbes	Boston, MA	\$6,264,286,855	816	0	56
49	Conrad Siegel Investment Advisors	Harrisburg, PA	\$6,170,054,239	349	24	24
50	The Bollard Group	Boston, MA	\$6,100,746,952	24	1	33

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51	Clear Investment Research	Alpharetta, GA	\$6,095,420,559	76	3	6
52	Seven Post Investment Office	San Francisco, CA	\$6,065,697,287	41	12	19
53	Brownson, Rehms & Foxworth	Chicago, IL	\$6,024,774,223	429	35	42
54	Altair Advisers	Chicago, IL	\$6,024,307,243	747	-	53
55	Heck Capital Advisors	Rhineland, WI	\$5,959,673,065	1,029	16	19
56	Choate Investment Advisors	Boston, MA	\$5,740,825,671	388	4	14
57	Dowling & Yahnke	San Diego, CA	\$5,699,173,134	1,370	25	54
58	Northwest Capital Management	Portland, OR	\$5,660,880,241	457	8	15
59	Orgel Wealth Management	Altoona, WI	\$5,618,834,000	3,137	21	56
60	The Mather Group	Chicago, IL	\$5,613,688,137	2,278	56	96
61	RSM US Wealth Management	Minneapolis, MN	\$5,588,986,655	3,680	91	123
62	Guided Choice Asset Management	San Diego, CA	\$5,577,829,656	100,380	-	22
63	Gofen And Glossberg	Chicago, IL	\$5,555,829,642	3,355	14	35
64	Joel Isaacson & Co.	New York, NY	\$5,515,350,075	1,147	-	47
65	R M Davis	Portland, OR	\$5,380,525,208	2,474	19	47
66	BMO Family Office	Chicago, IL	\$5,379,811,542	46	14	120
67	Balasa Dinverno Foltz	Itasca, IL	\$5,366,480,585	1,433	43	45
68	Arlington Partners	Birmingham, AL	\$5,314,485,039	136	12	30
69	Greenspring Advisors	Towson, MD	\$5,248,230,568	584	13	19
70	H.M. Payson	Portland, ME	\$5,186,371,052	3,166	15	27
71	Regentatlantic	Morristown, NJ	\$5,156,329,282	2,020	37	67
72	Plancorp	Saint Louis, MO	\$5,067,823,661	1,295	33	68
73	SBSB Financial Advisors	McLean, VA	\$5,062,963,936	1,171	31	66
74	Iron Capital Advisors	Atlanta, GA	\$5,046,955,853	191	2	6
75	Marcuard Family Office	Zurich	\$5,027,497,457	122	-	31

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76	BIOJS	San Francisco, CA	\$5,023,099,233	899	27	40
77	Portola Partners	Menlo Park, CA	\$4,998,501,584	48	19	28
78	Aureus Asset Management	Boston, MD	\$4,997,711,832	156	3	11
79	Modera Wealth Management	Westwood, NJ	\$4,957,474,109	2,014	54	81
80	First Foundation Advisors	Irvine, CA	\$4,926,790,498	1,402	33	63
81	Bradley Foster & Sargent	Hartford, CT	\$4,879,423,390	1,527	9	37
82	RGT Wealth Advisors	Dallas, TX	\$4,860,323,776	633	22	57
83	Evanston Asset Management	Carmel, CA	\$4,742,103,231	1,123	6	6
84	TCG Advisory Services	Austin, TX	\$4,601,946,387	1,191	30	118
85	Finaccess Advisors	Miami, FL	\$4,591,321,000	100	10	14
86	Brightworth	Atlanta, GA	\$4,583,516,499	2,224	27	76
87	QCI Asset Management	Pittsford, NY	\$4,541,809,080	1,412	-	32
88	Retirement Planners Of America	Plano, TX	\$4,504,485,677	8,678	37	100
89	Adviceperiod	Los Angeles, CA	\$4,458,760,534	1,162	67	92
90	Sepio Capital	Alamo, CA	\$4,422,858,591	188	19	25
91	Investment Management Group	Billings, MT	\$4,391,732,852	1,149	18	22
92	Pension Consultants	Springfield, MO	\$4,383,801,274	96	9	20
93	WMS Partners	Towson, MD	\$4,374,397,680	607	29	65
94	Alesco Advisors	Pittsford, NY	\$4,249,736,239	562	1	21
95	Linscomb & Williams	Houston, TX	\$4,218,658,522	6,866	27	54
96	Kore Private Wealth	New York, NY	\$4,189,712,433	1,083	6	21
97	Laird Norton Wealth Management	Seattle, WA	\$4,170,894,450	457	38	84
98	Index Fund Advisors	Irvine, CA	\$4,132,878,908	2,352	15	41
99	Cambridge Associates	Boston, MA	\$4,092,521,805	16	-	11
100	Pacific Portfolio Consulting	Seattle, WA	\$4,051,891,789	290	9	20

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101	Zhang Financial	Portage, MI	\$4,003,179,936	1,517	13	31
102	Nextcapital Advisers	Chicago, IL	\$3,965,402,163	31,636	1	24
103	Camden Capital	El Segundo, CA	\$3,921,292,415	362	16	32
104	Smith Shellnut Wilson	Ridgeland, MS	\$3,911,862,280	419	7	12
105	Advisors Capital Management	Ridgewood, NJ	\$3,883,906,439	6,590	19	28
106	R H Bluestein & Co	Birmingham, MI	\$3,882,050,818	1,039	8	29
107	Truepoint	Cincinnati, OH	\$3,864,680,680	1,445	27	68
108	Inverness Counsel	New York, NY	\$3,850,490,843	1,255	-	34
109	Badgley Phelps Wealth Managers	Seattle, WA	\$3,818,379,798	794	18	22
110	Parallel Advisors	San Francisco, CA	\$3,811,586,295	2,409	35	65
111	Northeast Financial	Westport, CT	\$3,811,085,990	233	2	8
112	JMG Financial Group	Downers Grove, IL	\$3,788,219,000	1,154	31	54
113	Abacus Wealth Partners	Santa Monica, CA	\$3,749,645,000	1,665	58	64
114	Permanens Capital	New York, NY	\$3,726,101,932	81	-	15
115	F L Putnam Investment Management	Wellesley, MA	\$3,721,873,743	1,294	27	53
116	Beacon Trust	Morristown, NJ	\$3,705,000,000	2,424	27	45
117	BKD Wealth Advisors	Springfield, MO	\$3,703,993,084	1,590	44	70
118	ARGI Investment Services	Louisville, KY	\$3,700,382,256	3,808	76	141
119	Crescent Grove Advisors	Lake Forest, IL	\$3,695,568,091	274	14	29
120	HM Capital Management	Clayton, MO	\$3,678,816,885	133	5	8
121	Covington Capital Management	Los Angeles, CA	\$3,584,279,172	431	-	25
122	Becker Capital Management	Portland, OR	\$3,574,014,983	730	15	30
123	Lamco Advisory Services	Lake Mary, FL	\$3,541,041,993	238	6	13
124	Clifford Swan Investment Counselors	Pasadena, CA	\$3,533,971,121	903	12	29
125	Prio Wealth Limited Partnership	Boston, MA	\$3,516,709,222	671	10	25

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126	Exencial Wealth Advisors	Oklahoma City, OK	\$3,489,925,445	2,393	41	81
127	Formula Folio Investments	Grand Rapids, MI	\$3,467,023,250	22,837	30	30
128	Waldron Private Wealth	Bridgeville, PA	\$3,455,593,105	351	28	30
129	Advance Capital Management	Southfield, MI	\$3,451,072,833	6,103	26	50
130	Parsec Financial	Asheville, NC	\$3,427,806,357	1,836	31	68
131	Mainstay Capital Management	Grand Blanc, MI	\$3,419,797,573	3,728	19	29
132	Balentine	Atlanta, GA	\$3,348,156,610	322	1	37
133	Berman Capital Advisors	Atlanta, GA	\$3,340,175,884	246	15	30
134	Soltis Investment Advisors	St. George, UT	\$3,322,688,921	1,989	24	40
135	Kunath Karren Rinne & Atkin	Seattle, WA	\$3,304,103,913	81	3	7
136	Pure Financial Advisors	San Diego, CA	\$3,291,653,194	2,900	30	73
137	Warren Averett Asset Management	Birmingham, AL	\$3,291,010,494	1,278	25	49
138	Mccutchen Group	Seattle, WA	\$3,279,402,375	111	-	21
139	Reynders, Mcveigh Capital Management	Boston, MA	\$3,278,288,263	767	18	33
140	Boston Financial Management	Boston, MA	\$3,241,670,277	808	17	41
141	Destination Wealth Management	Walnut Creek, CA	\$3,226,536,075	1,907	31	52
142	David Vaughan Investments	Peoria, IL	\$3,217,482,536	1,109	15	35
143	Mid-Continent Capital	Chicago, IL	\$3,188,190,216	333	3	19
144	TCI Wealth Advisors	Tucson, AZ	\$3,182,065,274	2,343	21	55
145	Stelac Advisory Services	New York, NY	\$3,172,521,977	97	2	32
146	Mozaic	Beverly Hills, CA	\$3,150,873,899	66	-	15
147	SYM Financial Advisors	Winona Lake, IN	\$3,121,115,550	1,188	29	58
148	Westmount Asset Management	Los Angeles, CA	\$3,118,536,481	1,324	21	33
149	Crestone Asset Management	Boulder, CO	\$3,110,876,533	178	22	50
150	Heritage Investors Management	Bethesda, MD	\$3,083,050,755	703	7	15