

TOP 150 RIA FIRMS

RANK	FIRM	LOCATION	AUM (000)	CLIENT ACCOUNTS	ADVISERS	EMPLOYEES
1	Oxford Financial Group	Carmel, Ind.	\$13,576.98	8,468	35	145
2	Brownson Rehmus & Foxworth	Chicago	\$10,127.87	532	50	57
3	Shepherd Kaplan	Boston	\$8,350.89	2,260	18	51
4	Pathstone Federal Street	Fort Lee, N.J.	\$8,275.50	5,347	36	65
5	Ronald Blue	Roswell, Ga.	\$6,636.50	16,436	155	275
6	Athena Capital Advisors	Lincoln, Mass.	\$5,998.71	446	21	47
7	Ballentine Partners	Waltham, Mass.	\$5,989.73	3,376	43	55
8	WE Family Offices	Miami	\$5,015.06	69	25	43
9	Mill Creek Capital Advisors	Conshohocken, Pa.	\$4,706.11	307	22	25
10	RGT Wealth Advisors	Dallas	\$4,361.60	4,930	24	72
11	Ferguson Wellman Capital Management	Portland, Ore.	\$4,311.94	2,414	19	44
12	CV Advisors	Aventura, Fla.	\$4,231.84	103	4	27
13	Savant Capital Management	Rockford, Ill.	\$4,224.36	3,946	66	136
14	Seven Post Investment Office	San Francisco	\$4,178.89	372	12	14
15	Homrich Berg	Atlanta	\$4,081.97	5,801	26	80
16	Wetherby Asset Management	San Francisco	\$3,839.69	3,193	27	60
17	Halbert Hargrove	Long Beach, Calif.	\$3,817.84	3,259	38	43
18	Iron Capital Advisors	Atlanta	\$3,520.48	907	1	5
19	Evanson Asset Management	Carmel, Calif.	\$3,408.05	4,913	4	8
20	Bartlett	Cincinnati	\$3,358.33	1,159	20	47
21	Dowling & Yahnke	San Diego	\$3,332.81	3,953	15	34
22	Signature Family Wealth Advisors	Norfolk, Va.	\$3,316.47	1,024	25	38
23	Brighton Jones	Seattle	\$3,292.43	1,132	36	89
24	R. M. Davis	Portland, Maine	\$3,161.37	4,514	19	41
25	Balasa Dinverno Foltz	Itasca, Ill.	\$3,071.92	4,665	37	37

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26	RegentAtlantic	Morristown, N.J.	\$3,032.26	1,536	27	28
27	Orgel Wealth Management	Altoona, Wis.	\$3,031.97	7,026	14	34
28	Plancorp	St. Louis	\$3,026.11	5,624	25	48
29	WMS Partners	Towson, Md.	\$2,887.49	421	18	48
30	Personal Capital	San Francisco	\$2,853.46	19,522	98	123
31	Threshold Group	Seattle	\$2,829.80	1,476	10	40
32	Ropes Wealth Advisors	Boston	\$2,822.32	2,102	9	18
33	South Texas Money Management	San Antonio	\$2,759.06	2,848	30	60
34	Index Fund Advisors	Irvine, Calif.	\$2,727.01	5,598	20	40
35	Northeast Financial Consultants	Westport, Conn.	\$2,689.24	1,881	3	6
36	Sullivan Bruyette Speros & Blayney	McLean, Va.	\$2,673.00	933	26	47
37	Hartland	Cleveland	\$2,526.51	2,350	18	67
38	Miller Investment Management	Conshohocken, Pa.	\$2,514.11	236	14	17
39	CM Wealth Advisors	Cleveland	\$2,471.23	380	8	19
40	Alesco Advisors	Pittsford, N.Y.	\$2,445.72	941	6	14
41	Clifford Swan Investment Counselors	Pasadena, Calif.	\$2,391.89	2,310	14	31
42	MRA Associates	Phoenix	\$2,364.93	1,577	23	41
43	Paul Comstock Partners	Houston	\$2,280.42	159	5	5
44	Matter Family Office	Clayton, Mo.	\$2,209.54	219	18	30
45	Meristem	Minnetonka, Minn.	\$2,200.98	323	19	36
46	EP Wealth Advisors	Torrance, Calif.	\$2,180.00	5,598	35	48
47	Zhang Financial	Portage, Mich.	\$2,154.00	3,814	8	14
48	Adviser Investments	Newton, Mass.	\$2,094.90	5,505	29	60
49	Northwest Capital Management	Portland, Ore.	\$2,061.02	963	11	16
50	McCutchen Group	Seattle	\$2,048.81	546	3	16

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51	Budros, Ruhlin & Roe	Columbus, Ohio	\$2,046.65	6,511	22	40
52	Columbia Pacific Wealth Management	Seattle	\$2,020.20	595	17	20
53	Wescott Financial Advisory Group	Philadelphia	\$2,013.90	2,254	13	33
54	Badgley Phelps Wealth Managers	Seattle	\$2,011.38	1,499	20	23
55	Valeo Financial Advisors	Indianapolis	\$2,005.47	7,839	37	46
56	TCI Wealth Advisors	Tucson, Ariz.	\$1,980.85	6,466	19	51
57	Heritage Investors Management	Bethesda, Md.	\$1,972.36	1,150	6	12
58	David Vaughan Investments	Peoria, Ill.	\$1,967.89	1,872	18	22
59	Mainstay Capital Management	Grand Blanc, Mich.	\$1,930.31	3,800	15	22
60	Boston Financial Management	Boston	\$1,899.98	1,998	26	44
61	Zemenick & Walker	St. Louis	\$1,884.80	179	7	11
62	Retirement Advisors of America	Addison, Texas	\$1,865.76	3,931	17	35
63	JMG Financial Group	Oak Brook, Ill.	\$1,862.81	2,531	21	34
64	Green Square Capital	Memphis, Tenn.	\$1,841.71	1,855	15	23
65	Lake Street Advisors	Portsmouth, N.H.	\$1,817.46	1,079	18	31
66	Rinet	Boston	\$1,757.74	1,220	16	27
67	Twin Focus Capital Partners	Boston	\$1,741.90	82	15	20
68	SYM Financial Advisors	Winona Lake, Ind.	\$1,737.97	3,684	21	42
69	Parsec Financial Management	Asheville, N.C.	\$1,722.27	4,452	35	23
70	LBI Wealth Management	Saddle River, N.J.	\$1,709.81	200	1	3
71	Exencial Wealth Advisors	Oklahoma City	\$1,678.21	2,922	22	48
72	Mozaic	Beverly Hills, Calif.	\$1,677.02	63	1	11
73	Welch Hornsby	Montgomery, Ala.	\$1,673.56	452	13	25
74	Capital Directions	Atlanta	\$1,657.00	1,196	5	12
75	Modera Wealth Management	Westwood, N.J.	\$1,640.19	4,156	25	45

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76	Pinnacle Advisory Group	Columbia, Md.	\$1,600.00	3,801	22	51
77	Sand Hill Global Advisors	Palo Alto, Calif.	\$1,591.51	893	13	21
78	Foster Group	West Des Moines, Iowa	\$1,562.01	3,255	24	41
79	Sage Financial Group	Conshohocken, Pa.	\$1,545.38	2,629	12	17
80	Hamilton Capital Management	Columbus, Ohio	\$1,545.18	4,605	37	46
81	Destination Wealth Management	Walnut Creek, Calif.	\$1,537.58	3,710	23	39
82	Morton Capital Management	Calabasas, Calif.	\$1,535.83	2,327	23	24
83	Foster Dykema Cabot	Boston	\$1,156.61	506	9	16
84	Balentine	Atlanta	\$1,489.16	1,329	6	29
85	IWP Wealth Management	Denver	\$1,480.66	30	7	9
86	North American Management	Boston	\$1,471.15	1,177	18	32
87	Laird Norton Wealth Management	Seattle	\$1,466.33	1,323	34	80
88	Pure Financial Advisors	San Diego	\$1,465.98	7,312	27	52
89	Evensky & Katz/Foldes Financial	Coral Gables, Fla.	\$1,461.19	5,174	19	28
90	Patriot Wealth Management	Houston	\$1,450.78	1,777	12	15
91	Accredited Investors Wealth Mgmt.	Edina, Minn.	\$1,444.41	3,174	5	34
92	Chesley Taft	Chicago	\$1,439.03	1,407	7	12
93	Paratus Financial	Dallas	\$1,434.39	2,174	2	6
94	RCL Advisors	New York	\$1,433.17	135	3	6
95	Argent Wealth Management	Waltham, Mass.	\$1,430.58	1,763	15	26
96	Retirement Income Solutions	Ann Arbor, Mich.	\$1,416.12	1,144	12	16
97	Filament	Seattle	\$1,410.11	387	12	14
98	Vista Wealth Management	East Palo Alto, Calif.	\$1,363.99	1,638	14	27
99	BerganKDV Wealth Management	Bloomington, Minn.	\$1,351.53	1,722	20	24
100	Northeast Investment Management	Boston	\$1,322.74	1,203	8	22

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101	Crestwood Advisors	Boston	\$1,321.96	1,596	8	23
102	Envoi	Minnetonka, Minn.	\$1,311.07	746	6	10
103	Resource Consulting Group	Orlando, Fla.	\$1,302.41	1,823	11	19
104	Brouwer & Janachowski	Mill Valley, Calif.	\$1,279.29	1,495	13	19
105	Salem Investment Counselors	Winston Salem, N.C.	\$1,276.00	950	8	12
106	Radnor Financial Advisors	Wayne, Pa.	\$1,266.35	1,775	7	12
107	Cypress Wealth Advisors	San Francisco	\$1,227.91	348	6	16
108	Brightworth	Atlanta	\$1,227.34	1,524	19	25
109	Waldron Private Wealth	Bridgeville, Pa.	\$1,216.05	162	18	19
110	North Star Asset Management	Menasha, Wis.	\$1,213.04	1,858	13	16
111	Carnegie Investment Counsel	Pepper Pike, Ohio	\$1,207.09	2,550	19	21
112	Financial Clarity	Mountain View, Calif.	\$1,203.00	28	1	10
113	Palisades Hudson Asset Management	Fort Lauderdale, Fla.	\$1,193.79	118	7	15
114	New England Private Wealth Advisors	Wellesley, Mass.	\$1,184.71	2,137	8	16
115	True North Advisors	Dallas	\$1,178.74	2,821	13	23
116	Cardiff Park Advisors	Carlsbad, Calif.	\$1,158.07	1,825	1	3
117	Dyson Capital Advisors	Alexandria, Va.	\$1,152.86	22	5	14
118	McQueen Ball	Bethlehem, Pa.	\$1,142.78	1,037	6	15
119	Bridgewater Advisors	New York	\$1,140.72	2,265	9	16
120	Altfest Personal Wealth Management	New York	\$1,110.20	2,837	7	20
121	Colony Family Offices	Charlotte, N.C.	\$1,104.95	322	8	9
122	Sheaff Brock Investment Advisors	Indianapolis	\$1,100.57	2,553	24	35
123	Smith, Salley	Greensboro, N.C.	\$1,086.35	581	10	10
124	Corient Capital Partners	Newport Beach, Calif.	\$1,085.73	1,211	8	12
125	Daintree Advisors	Boston	\$1,081.85	1,031	14	23

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126	Sweetwater Investments	Redmond, Wash.	\$1,074.69	233	4	4
127	Wellspring Financial Advisors	Cleveland	\$1,070.92	703	5	9
128	Sargent Bickham Lagudis	Boulder, Colo.	\$1,065.34	690	13	28
129	Capstone Financial Advisors	Downers Grove, Ill.	\$1,058.17	1,993	9	28
130	Pegasus Partners	Mequon, Wis.	\$1,055.75	1,294	7	11
131	Emery Howard	Burlingame, Calif.	\$1,054.62	1,639	3	5
132	Sadoff Investment Management	Milwaukee	\$1,052.68	1,187	4	6
133	Fairway Wealth Management	Independence, Ohio	\$1,052.65	160	4	12
134	Conservest Capital Advisors	Wynnewood, Pa.	\$1,046.00	221	6	7
135	Foster & Motley	Cincinnati	\$1,045.03	659	21	32
136	MG Financial	Braintree, Mass.	\$1,039.32	72	2	7
137	Circle Wealth Management	Summit, N.J.	\$1,037.51	663	5	11
138	Parallel Advisors	San Francisco	\$1,037.17	4,214	28	31
139	Citrin Cooperman Wealth Management	New York	\$1,035.35	507	4	2
140	Guyasuta Investment Advisors	Pittsburgh	\$1,021.24	950	12	14
141	TrueWealth Management	Atlanta	\$1,020.81	1,992	16	27
142	Soltis Investment Advisors	St. George, Utah	\$1,020.08	963	13	24
143	Mountain Capital Investment Advisors	Broomfield, Colo.	\$1,020.00	500	2	2
144	Legacy Wealth Management	Memphis, Tenn.	\$1,019.34	2,443	18	21
145	Acropolis Investment Management	St. Louis	\$1,012.79	2,341	25	28
146	Heritage Financial Services	Westwood, Mass	\$1,001.59	3,413	14	24
147	Trumbower Financial Advisors	Bethesda, Md.	\$1,000.71	691	5	11
148	Boys Arnold	Asheville, N.C.	\$995.98	1,009	8	24
149	RTD Financial Advisors	Philadelphia	\$979.94	470	19	33
150	Phillips & Company Advisors	Portland, Ore	\$979.41	2,011	17	22

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