

FINANCIAL ADVISOR

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**FA's RIA
Survey &
Ranking
2023**

FA's 2023 RIA RANKING

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2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)*	% GROWTH IN ASSETS 2021-2022	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.	777,297.74	18.66%	28.57	-2.55%	21.77%
2	Edelman Financial Engines	Boston, Mass.	241,970.18	-16.66%	0.18	-17.30%	0.76%
3	SageView Advisory Group	Newport Beach, Calif.	156,399.42	-11.31%	35.50	-25.52%	19.08%
4	Hightower Advisors	Chicago, Ill.	105,230.21	1.55%	2.39	-15.33%	19.94%
5	Fort Washington Investment Advisors	Cincinnati, Ohio	71,037.80	3.76%	137.67	-0.67%	4.45%
6	Mariner Wealth Advisors	Overland Park, Kan.	65,874.57	18.84%	1.81	-1.64%	20.82%
7	Wealth Enhancement Advisory Services	Plymouth, Minn.	56,392.71	7.19%	1.15	-14.26%	25.02%
8	CIBC Private Wealth Advisors	Atlanta, Ga.	47,518.25	-31.87%	4.93	-36.92%	8.00%
9	Cerity Partners	New York, N.Y.	40,433.57	51.38%	3.57	6.92%	41.59%
10	Fiducient Advisors	Chicago, Ill.	40,020.77	5.66%	62.73	-3.94%	10.00%
11	Kayne Anderson Rudnick Investment Mgmt.	Los Angeles, Calif.	33,531.27	-29.06%	1.26	-34.93%	9.01%
12	Moneta	St. Louis, Mo.	30,651.38	-6.80%	4.46	-13.65%	7.93%
13	Silvercrest Asset Management Group	New York, N.Y.	28,904.99	-10.57%	34.37	-7.06%	-3.78%
14	Evoke Advisors†	Los Angeles, Calif.	24,940.07	-2.04%	28.87	-9.41%	8.14%
15	Pathstone	Englewood, N.J.	24,835.86	9.87%	16.04	-28.39%	53.42%
16	Advanced Capital Group	Minneapolis, Minn.	24,700.48	-17.04%	72.22	-22.14%	6.54%
17	Cresset Asset Management	Chicago, Ill.	24,611.93	7.16%	9.79	-31.72%	56.93%
18	BBR Partners	New York, N.Y.	24,081.60	-7.26%	136.83	-8.32%	1.15%
19	Beacon Pointe Advisors	Newport Beach, Calif.	23,245.73	-1.81%	1.66	-12.45%	12.15%
20	Segall Bryant & Hamill	Chicago, Ill.	22,239.08	-13.27%	12.11	-13.89%	0.71%
21	Buckingham Strategic Wealth	Saint Louis, Miss.	22,079.59	-3.41%	1.78	-16.36%	15.49%
22	Carson Wealth	Omaha, Neb.	19,943.56	-0.03%	2.19	-12.09%	13.72%
23	AE Wealth Management	Topeka, Kan.	19,248.84	-1.99%	0.23	-18.72%	20.57%
24	The Colony Group	Boston, Mass.	18,829.21	1.02%	2.78	-12.81%	15.86%
25	Wealthspire Advisors	New York, N.Y.	18,772.10	7.59%	2.65	-1.81%	9.57%
26	1919 Investment Counsel	New York, N.Y.	17,378.99	-14.65%	9.41	7.81%	-20.84%
27	Bahl & Gaynor	Cincinnati, Ohio	17,102.53	-4.99%	20.46	-12.04%	8.01%
28	Plante Moran Financial Advisors	Southfield, Mich.	16,742.52	-15.55%	4.85	-19.54%	4.95%
29	Johnson Investment Counsel	Cincinnati, Ohio	16,313.91	-13.06%	3.46	-19.39%	7.85%
30	MAJ Capital Management	Cleveland, Ohio	15,773.43	9.64%	2.23	-25.81%	47.79%
31	Oxford Financial Group, Ltd.	Carmel, Ind.	15,587.91	-8.65%	21.92	-10.71%	2.30%
32	Allworth Financial	Folsom, Calif.	14,880.81	7.97%	0.76	-14.05%	25.82%
33	Newport Capital Group	Red Bank, N.J.	14,665.99	-11.49%	63.77	-23.04%	15.00%
34	Lido Advisors	Los Angeles, Calif.	13,102.07	18.55%	2.79	-8.19%	29.13%
35	Aspiriant	Los Angeles, Calif.	12,969.47	-16.20%	5.90	-20.01%	4.76%
36	Homrich Berg	Atlanta, Ga.	12,528.31	13.04%	3.39	-12.41%	29.06%
37	Choreo	Minneapolis, Minn.	12,190.11	26.60%	1.94	-22.38%	63.10%
38	Appleton Partners	Boston, Mass.	12,139.35	-2.97%	1.78	-5.66%	2.85%
39	WE Family Offices	Miami, Fla.	12,056.43	-9.91%	113.74	-18.41%	10.42%
40	myCIO Wealth Partners	Philadelphia, Pa.	12,007.38	1.41%	13.88	-2.22%	3.72%
41	Signature Estate & Investment Advisors	Los Angeles, Calif.	11,665.90	-5.75%	0.68	-12.04%	7.15%
42	Evercore Wealth Management	New York, N.Y.	10,537.12	-13.51%	14.68	-17.25%	4.51%
43	Clearstead Advisors	Cleveland, Ohio	10,227.85	-8.89%	8.95	-12.72%	4.38%
44	Mason Investment Advisory Services	Reston, Va.	10,094.48	5.95%	10.72	1.68%	4.20%
45	CliftonLarsonAllen Wealth Advisors	Minneapolis, Minn.	10,090.00	-3.35%	1.55	-9.30%	6.56%
46	Gresham Partners	Chicago, Ill.	9,527.15	0.11%	78.74	-8.99%	10.00%
47	Brighton Jones	Seattle, Wash.	9,458.38	-5.89%	3.64	-12.81%	7.93%
48	Williams Jones Wealth Management	New York, N.Y.	9,325.07	-14.87%	6.73	-16.03%	1.39%
49	IRA Group	Atlanta, Ga.	9,075.04	-7.85%	35.73	-10.02%	2.42%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of May 2020). ††Firm started in 2022. †††Halpern Financial's % Growth in Assets 2021-2022 and % Growth in Assets per Client have been revised, due to an error by Halpern.

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