FA

RIA SURVEY & RANKING 2024

SPONSORED BY

Commonwealth

WisdomTree®

FA's 2024 RIA RANKING

Commonwealth

WisdomTree®

2023 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2023 ASSETS ($MM)*	% GROWTH IN ASSETS 2022-2023	ASSETS PER CLIENT ($MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
ASSET CATEGORY: $1 BILLION AND OVER							
1	**CAPTRUST**	Raleigh, N.C.	852,173.05	18.07%	26.78	-5.41%	24.83%
2	**Edelman Financial Engines**	Boston, Mass.	270,770.41	11.90%	0.21	13.62%	-1.52%
3	**SageView Advisory Group**	Newport Beach, Calif.	202,573.50	29.52%	44.42	25.04%	3.59%
4	**Creative Planning**	Overland Park, Kan.	175,271.68	34.28%	2.43	17.76%	14.03%
5	**Corient ‡‡**	Miami, Fla.	155,700.00	17.07%	N/A	N/A	N/A
6	**Hightower Advisors**	Chicago, Ill.	130,239.34	23.77%	2.49	4.26%	18.71%
7	**Mariner Wealth Advisors**	Overland Park, Kan.	81,106.93	12.29%	2.03	2.32%	9.75%
8	**Cerity Partners**	New York, N.Y.	80,573.11	51.08%	2.85	-39.50%	149.74%
9	**Fort Washington Investment Advisors**	Cincinnati, Ohio	79,457.68	11.85%	146.87	6.68%	4.84%
10	**Wealth Enhancement Advisory Services**	Plymouth, Minn.	72,024.61	27.72%	1.20	5.89%	20.62%
11	**CIBC Private Wealth, US**	Atlanta, Ga.	57,308.55	12.14%	6.13	15.46%	-2.88%
12	**Fiducient Advisors**	Chicago, Ill.	55,897.06	39.67%	88.44	41.00%	-0.94%
13	**Pathstone**	Englewood, N.J.	48,013.14	93.32%	25.31	57.65%	22.62%
14	**Mercer Advisors**	Denver, Colo.	45,350.20	33.34%	1.47	22.98%	8.42%
15	**Kayne Anderson Rudnick Investment Mgmt.**	Los Angeles, Calif.	41,186.29	22.83%	1.47	16.72%	5.24%
16	**Moneta**	St. Louis, Mo.	37,481.64	22.28%	5.08	13.82%	7.43%
17	**Silvercrest Asset Management Group**	New York, N.Y.	33,280.64	15.14%	39.86	15.97%	-0.71%
18	**Beacon Pointe Advisors**	Newport Beach, Calif.	31,279.96	34.56%	2.09	25.59%	7.14%
19	**AE Wealth Management ‡**	Topeka, Kan.	27,082.62	40.70%	0.28	21.68%	15.63%
20	**Buckingham Strategic Wealth**	Saint Louis, Mo.	27,027.68	22.41%	1.92	16.08%	5.46%
21	**Carson Group**	Omaha, Neb.	26,774.39	34.25%	0.55	22.81%	9.32%
22	**Wealthspire Advisors §**	New York, N.Y.	25,269.23	34.61%	2.77	11.54%	20.69%
23	**Savant Wealth Management**	Rockford, Ill.	24,397.51	81.70%	1.50	7.40%	69.18%
24	**Evoke Advisors****	Los Angeles, Calif.	23,665.26	-5.11%	28.11	-8.04%	3.19%
25	**The Colony Group**	Boston, Mass.	21,472.65	13.73%	3.10	11.32%	2.17%
26	**1919 Investment Counsel**	Baltimore, Md.	21,255.59	22.31%	5.80	3.38%	18.30%
27	**Lido Advisors**	Los Angeles, Calif.	19,656.37	50.02%	2.77	-0.40%	50.63%
28	**Plante Moran Financial Advisors**	Southfield, Mich.	19,432.09	16.06%	5.45	12.51%	3.16%
29	**Allworth Financial**	Folsom, Calif.	19,313.70	29.79%	0.84	10.04%	17.95%
30	**MAI Capital Management**	Cleveland, Ohio	19,251.36	22.05%	2.34	4.95%	16.30%
31	**Johnson Investment Counsel**	Cincinnati, Ohio	18,609.06	14.07%	3.79	9.38%	4.29%
32	**Oxford Financial Group, Ltd.**	Carmel, Ind.	18,201.05	16.76%	25.93	18.26%	-1.27%
33	**Newport Capital Group**	Red Bank, N.J.	16,521.22	12.65%	77.56	21.64%	-7.39%
34	**Choreo ‡**	Rockford, Ill.	16,030.87	31.51%	2.26	16.16%	13.21%
35	**Clearstead**	Cleveland, Ohio	15,321.61	49.80%	10.21	14.17%	31.21%
36	**Homrich Berg**	Atlanta, Ga.	15,199.30	21.32%	3.79	11.73%	8.58%
37	**Aspiriant**	Los Angeles, Calif.	14,659.63	13.03%	6.52	10.52%	2.27%
38	**WE Family Offices**	Coral Gables, Fla.	13,909.42	15.37%	128.79	13.23%	1.89%
39	**myCIO Wealth Partners**	Philadelphia, Pa.	12,968.14	8.00%	14.54	4.73%	3.12%
40	**Appleton Partners**	Boston, Mass.	12,842.31	5.79%	1.79	3.02%	2.69%

*Average assets per client relationship. **AUM is the combined totals for Evoke Advisors and Advanced Research Investment Solutions (merged as of 5/2020). †AUM based on fiscal year end 5/31/23. †† AUM as of 2/24 as reported on latest ADV form. ‡ AUM as of 3/24 as reported on latest ADV form. ‡‡AUM includes assets managed by Corient, and firms in which Corient has an investment. Not all assets are considered regulatory assets as defined in their Form ADV. §AUM and client numbers are as of 12/31/23 for Wealthspire Advisors and its subsidiaries, separately registered investment advisors and subsidiary companies of NFP, an Aon company. §§Cary Street Partners Financial is the parent company to Cary Street Partners Investment Advisory. §§§Monument Capital Management doing business as Monument Wealth Management. # Destiny Wealth Partners' 2023 and 2022 AUM and Assets Per Client have been revised because of participant error.

To be eligible for Financial Advisor's RIA Survey & Ranking, firms must be an independent registered investment advisor and file their own ADV statement with the SEC and provide financial planning and related services to individual clients. Firms complete and submit a survey, and each is represented in the final survey ranking. The annual ranking is based on the previous year's assets for discretionary and nondiscretionary assets reported on Form ADV. Oxford did not pay a fee for inclusion in the rankings but did purchase the rights to reprint and utilize the ranking and logo.