

JULY 11, 2025

FA's 2025  
**RIA**  
SURVEY AND  
RANKING

# FA's 2025 RIA RANKING

2024 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2024 ASSETS (\$MM)*	% GROWTH IN ASSETS 2023-2024	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
ASSET CATEGORY: 1 BILLION AND OVER							
1	CAPTRUST Financial Advisors	Raleigh, N.C.	1,083,051.01	33.68%	29.40	15.46%	15.78%
2	Edelman Financial Engines	Boston, Mass.	292,902.97	8.17%	0.23	9.01%	-0.77%
3	SageView Advisory Group	Newport Beach, Calif.	238,552.02	17.76%	50.15	12.88%	4.32%
4	Creative Planning †	Overland Park, Kan.	234,610.38	33.86%	2.18	-5.51%	41.67%
5	Hightower Advisors	Chicago, Ill.	164,789.47	26.53%	2.99	7.26%	17.96%
6	Corient ¶	Miami, Fla.	143,628.53	21.52%	5.98	N/A	N/A
7	Cerity Partners	New York, N.Y.	122,848.69	52.47%	3.26	14.28%	33.42%
8	Pathstone	Englewood, N.J.	100,444.14	108.14%	47.18	85.46%	12.23%
9	Focus Partners Wealth	Boston, Mass.	95,889.89	346.57%	2.74	-28.75%	526.77%
10	Wealth Enhancement Advisory Services	Plymouth, Minn.	94,632.03	31.39%	1.34	11.54%	17.79%
11	Fiducient Advisors	Chicago, Ill.	67,638.98	21.01%	101.41	14.66%	5.54%
12	CIBC Private Wealth Advisors	Atlanta, Ga.	61,112.97	10.50%	6.08	-1.05%	11.67%
13	Mercer Advisors	Denver, Colo.	60,256.27	32.87%	1.84	25.44%	5.92%
14	Cresset Asset Management ††	Chicago, Ill.	52,506.64	28.91%	17.15	58.98%	-18.91%
15	Innovest Portfolio Solutions ‡‡	Denver, Colo.	50,616.98	11.74%	114.52	-4.19%	16.62%
16	Kayne Anderson Rudnick Investment Mgmt.	Los Angeles, Calif.	45,493.86	10.46%	1.66	13.06%	-2.30%
17	Moneta	St. Louis, Mo.	42,795.58	14.18%	5.34	5.11%	8.63%
18	Beacon Pointe Advisors	Newport Beach, Calif.	39,839.76	27.37%	1.81	-13.16%	46.67%
19	AE Wealth Management **	Topeka, Kan.	37,525.71	38.56%	0.33	17.78%	17.65%
20	Silvercrest Asset Management Group	New York, N.Y.	36,454.73	9.54%	43.82	9.93%	-0.36%
21	First Manhattan Co.	New York, N.Y.	34,439.57	8.21%	12.51	9.00%	-0.72%
22	Kovitz Investment Group Partners §	Chicago, Ill.	31,731.80	181.04%	2.65	-42.31%	387.18%
23	Wealthspire Advisors	New York, N.Y.	29,298.36	15.94%	3.08	11.26%	4.21%
24	Savant Wealth Management	Rockford, Ill.	29,094.58	19.25%	1.73	15.78%	3.00%
25	MAI Capital Management	Cleveland, Ohio	29,060.28	50.95%	2.34	-0.01%	50.97%
26	AITi Tiedemann Global	New York, N.Y.	29,043.17	38.47%	66.61	29.57%	6.86%
27	Evoke Advisors	Los Angeles, Calif.	27,695.49	5.56%	30.01	-3.71%	9.62%
28	Steward Partners	New York, N.Y.	26,873.41	25.01%	0.97	11.01%	12.62%
29	Allworth Financial	Folsom, Calif.	25,097.13	29.94%	0.87	4.14%	24.78%
30	Clearstead Advisors	Cleveland, Ohio	24,294.18	58.56%	5.06	-50.39%	219.59%
31	1919 Investment Counsel	Baltimore, Md.	23,984.81	12.84%	12.21	13.47%	-0.56%
32	Johnson Investment Counsel	Cincinnati, Ohio	20,872.14	12.16%	4.07	7.52%	4.32%
33	Oxford Financial Group	Carmel, Ind.	19,650.38	7.96%	28.94	11.62%	-3.28%
34	Newport Capital Group	Red Bank, N.J.	18,953.44	14.72%	86.15	11.07%	3.29%
35	Homrich Berg	Atlanta, Ga.	18,591.40	22.32%	4.39	15.82%	5.61%
36	Choreo	Rockford, Ill.	18,232.36	13.73%	2.52	7.64%	5.66%
37	RWA Wealth Partners	Newton, Mass.	17,255.24	11.88%	2.81	17.03%	-4.40%
38	Waverly Advisors	Birmingham, Ala.	16,130.19	60.37%	1.60	-33.21%	140.12%
39	Aspiriant	Los Angeles, Calif.	15,532.93	4.73%	6.87	2.83%	1.85%
40	Modera Wealth Management	Westwood, N.J.	15,510.48	23.76%	2.54	5.40%	17.42%
41	WE Family Offices	Coral Gables, Fla.	15,364.80	10.46%	143.60	11.50%	-0.93%
42	myCIO Wealth Partners	Philadelphia, Pa.	14,415.67	11.16%	15.88	9.20%	1.79%
43	Evercore Wealth Management	New York, N.Y.	13,898.60	13.26%	18.48	10.40%	2.59%
44	Appleton Partners	Boston, Mass.	13,452.68	6.30%	1.81	2.07%	4.14%
45	Mason Investment Advisory Service	Reston, Va.	13,204.25	8.63%	11.90	0.51%	8.08%
46	Investment Research & Advisory Group	Atlanta, Ga.	13,197.61	14.78%	46.47	9.93%	4.41%
47	CV Advisors	Aventura, Fla.	12,855.52	32.83%	102.03	23.34%	7.69%
48	CliftonLarsonAllen Wealth Advisors	Minneapolis, Minn.	12,327.82	54.53%	1.76	45.70%	6.06%
49	Gresham Partners	Chicago, Ill.	11,650.77	12.22%	94.72	7.66%	4.24%

Opinions and estimates contained in this article are subject to change without notice, as are statements of financial market trends, which are based on current market conditions. This article originally appeared on *Financial Advisor* magazine's website on July 11, 2025.

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