

FINANCIAL ADVISOR



KNOWLEDGE FOR THE SOPHISTICATED ADVISOR

July/August 2022 • www.fa-mag.com

SPONSORED BY



FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	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.	655,054.29	45.30%	29.32	-6.80%	55.89%
2	Edelman Financial Engines	Boston, Mass.	290,354.75	11.63%	0.22	10.77%	0.78%
3	Creative Planning	Overland Park, Kan.	133,830.63	92.61%	2.78	63.76%	17.62%
4	Global Retirement Partners	San Rafael, Calif.	107,120.21	37.66%	5.38	-63.53%	277.45%
5	Hightower Advisors	Chicago, Ill.	103,620.35	39.09%	2.82	22.75%	13.31%
6	Fort Washington Investment Advisors	Cincinnati, Ohio	78,334.22	12.95%	43.49	10.07%	2.62%
7	CIBC Private Wealth Advisors	Atlanta, Ga.	73,775.46	60.77%	8.27	49.12%	7.81%
8	Mariner Wealth Advisors	Overland Park, Kan.	55,432.64	58.55%	1.84	20.50%	31.58%
9	Wealth Enhancement Advisory Services	Plymouth, Minn.	52,608.71	116.82%	1.34	30.45%	66.21%
10	Kayne Anderson Rudnick Investment Mgmt	Los Angeles, Calif.	47,269.30	19.42%	1.93	-16.62%	43.22%
11	Cerity Partners	New York, N.Y.	44,670.53	67.25%	7.82	11.62%	49.83%
12	Chevy Chase Trust	Bethesda, Md.	39,184.72	9.25%	33.58	2.60%	6.48%
13	Fiducient Advisors	Chicago, Ill.	37,875.89	33.82%	65.30	36.59%	-2.03%
14	Mercer Global Advisors	Denver, Colo.	34,011.52	71.17%	1.44	23.17%	38.97%
15	Moneta	St. Louis, Mo.	32,888.76	19.95%	5.16	2.55%	16.97%
16	Silvercrest Asset Management Group	New York, N.Y.	32,319.68	16.18%	37.02	8.46%	7.12%
17	Advanced Capital Group	Minneapolis, Minn.	29,775.39	27.03%	92.76	17.92%	7.72%
18	BBR Partners	New York, N.Y.	25,967.70	25.40%	149.24	16.03%	8.07%
19	Segall Bryant & Hamill	Chicago, Ill.	25,642.77	12.02%	14.07	6.61%	5.07%
20	Evoke Advisors	Los Angeles, Calif.	25,460.46	24.46%	42.86	-14.51%	45.59%
21	Beacon Pointe Advisors	Newport Beach, Calif.	23,674.54	90.28%	1.90	-10.07%	111.58%
22	Cresset Capital	Chicago, Ill.	22,967.86	96.69%	14.34	16.64%	68.63%
23	Buckingham Strategic Wealth	St. Louis, Mo.	22,858.70	20.56%	2.13	7.91%	11.73%
24	Pathstone	Englewood, N.J.	22,604.85	-4.57%	22.65	-4.38%	-0.20%
25	Tiedemann Advisors	New York, N.Y.	21,232.90	15.30%	53.62	11.23%	3.66%
26	1919 Investment Counsel	New York, N.Y.	20,363.15	16.00%	8.73	8.94%	6.48%
27	Carson Wealth	Omaha, Neb.	20,021.17	31.63%	2.50	-10.94%	47.79%
28	Plante Moran Financial Advisors	Southfield, Mich.	19,826.27	21.49%	6.02	8.35%	12.13%
29	AE Wealth Management	Topeka, Kan.	19,640.09	55.42%	0.29	58.92%	-2.20%
30	Johnson Investment Counsel	Cincinnati, Ohio	18,763.71	20.86%	4.30	22.21%	-1.11%
31	The Colony Group	Boston, Mass.	18,638.72	42.78%	3.30	16.57%	22.49%
32	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	18,001.52	9.77%	23.26	6.22%	3.34%
33	Wealthspire Advisors	New York, N.Y.	17,448.09	37.22%	1.89	-32.44%	103.10%
34	Oxford Financial Group	Carmel, Ind.	17,063.96	15.15%	23.63	11.16%	3.59%
35	Newport Capital Group	Red Bank, N.J.	16,570.34	10.50%	82.85	13.26%	-2.44%
36	Aspiriant	Los Angeles, Calif.	15,477.03	12.30%	7.37	-7.00%	20.76%
37	LeafHouse Financial	Austin, Texas	15,453.59	19.77%	6.32	-6.63%	28.28%
38	MAI Capital Management	Cleveland, Ohio	14,386.11	55.55%	3.05	-14.47%	81.85%
39	Allworth Financial	Folsom, Calif.	13,782.22	36.21%	0.89	14.94%	18.50%
40	WE Family Offices	Miami, Fla.	13,382.46	31.19%	139.40	17.53%	11.63%
41	Savant Wealth Management	Rockford, Ill.	13,130.28	46.63%	1.68	20.94%	21.24%
42	Signature Estate & Investment Advisors	Los Angeles, Calif.	12,726.44	24.66%	0.81	13.27%	10.05%
43	Appleton Partners	Boston, Mass.	12,509.80	0.63%	1.89	-1.07%	1.72%
44	Evercore Wealth Management	New York, N.Y.	12,183.59	19.84%	17.76	18.62%	1.03%
45	myCIO Wealth Partners	Philadelphia, Pa.	11,840.13	19.44%	14.20	17.29%	1.83%
46	Clearstead Advisors	Cleveland, Ohio	11,225.68	56.72%	10.25	17.65%	33.21%
47	Homrich Berg	Atlanta, Ga.	11,082.92	24.12%	3.89	-4.19%	29.55%
48	Williams Jones Wealth Management	New York, N.Y.	10,953.35	17.27%	8.01	14.79%	2.17%
49	Ballentine Partners	Waltham, Mass.	10,519.79	21.29%	38.96	7.36%	12.97%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ††Pan Global Advisors is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
50	GW & Wade	Wellesley, Mass.	10,403.99	25.47%	3.03	14.13%	9.94%
51	Sequoia Financial Group	Akron, Ohio	10,090.92	81.90%	1.82	22.14%	48.93%
52	Brighton Jones	Seattle, Wash.	10,050.81	19.04%	4.17	12.32%	5.99%
53	Choreo	Minneapolis, Minn.	9,977.99	33.67%	2.49	25.32%	6.67%
54	Investment Research & Advisory Group	Atlanta, Ga.	9,657.00	27.60%	45.99	18.49%	7.69%
55	Mill Creek Capital Advisors	Conshohocken, Pa.	9,436.96	17.22%	25.85	12.08%	4.58%
56	CV Advisors	Aventura, Fla.	9,406.62	22.79%	90.45	0.36%	22.35%
57	Freestone Capital Management	Seattle, Wash.	8,929.18	23.61%	3.94	13.86%	8.56%
58	Johnson Wealth	Milwaukee, Wis.	8,804.22	10.48%	9.69	8.42%	1.91%
59	The Mather Group	Chicago, Ill.	8,579.76	58.17%	2.74	9.34%	44.66%
60	Douglas C. Lane & Associates	New York, N.Y.	8,475.47	23.24%	6.84	20.66%	2.14%
61	Brookstone Capital Management	Wheaton, Ill.	8,404.35	19.79%	0.22	5.79%	13.24%
62	Tolleson Wealth Management	Dallas, Texas	8,181.88	18.96%	43.06	11.44%	6.74%
63	Bartlett Wealth Management	Cincinnati, Ohio	8,178.56	13.76%	3.94	4.51%	8.86%
64	Welch & Forbes	Boston, Mass.	7,806.73	24.62%	9.47	23.41%	0.98%
65	Kovitz Investment Group Partners	Chicago, Ill.	7,801.47	21.14%	3.61	16.77%	3.74%
66	Conrad Siegel Investment Advisors	Harrisburg, Pa.	7,618.02	23.47%	20.10	0.99%	22.26%
67	Cornerstone Advisors Asset Management	Bethlehem, Pa.	7,611.77	10.71%	16.66	-2.86%	13.97%
68	Ropes Wealth Advisors	Boston, Mass.	7,502.87	18.50%	5.78	11.38%	6.39%
69	Forum Financial Management	Lombard, Ill.	7,399.29	37.90%	1.62	21.70%	13.31%
70	Valeo Financial Advisors	Carmel, Ind.	7,277.85	13.87%	4.37	-1.60%	15.72%
71	Wetherby Asset Management	San Francisco, Calif.	7,272.83	10.66%	12.50	10.09%	0.52%
72	Adviser Investments	Newton, Mass.	7,249.88	10.83%	1.85	7.07%	3.51%
73	Coldstream Wealth Management	Bellevue, Wash.	7,219.30	67.02%	3.04	6.89%	56.26%
74	Monroe Vos Consulting	Houston, Texas	7,149.25	9.29%	67.45	8.26%	0.95%
75	Modera Wealth Management	Westwood, N.J.	6,950.53	40.20%	3.51	22.79%	14.18%
76	Joel Isaacson & Co.	New York, N.Y.	6,754.22	22.46%	5.66	17.64%	4.10%
77	Altair Advisers	Chicago, Ill.	6,683.26	10.94%	19.10	6.18%	4.48%
78	Heck Capital Advisors	Rhineland, Wis.	6,674.67	12.11%	5.70	-1.40%	13.70%
79	Plancorp	St. Louis, Mo.	6,605.20	30.34%	4.85	39.82%	-6.78%
80	Thrivent Advisor Network	Minneapolis, Minn.	6,529.17	23.33%	0.55	3.01%	19.72%
81	Gofen and Glossberg	Chicago, Ill.	6,479.22	16.62%	5.11	7.15%	8.84%
82	Clarfeld Financial Advisors	Tarrytown, N.Y.	6,471.11	28.96%	5.88	-3.63%	33.82%
83	RegentAtlantic	Morristown, N.J.	6,205.19	20.34%	3.47	14.69%	4.92%
84	Zeke Capital Advisors	Berwyn, Pa.	6,164.65	12.08%	55.04	-1.93%	14.29%
85	SignatureFD	Atlanta, Ga.	6,143.96	34.21%	3.95	19.79%	12.03%
86	Greenspring Advisors	Towson, Md.	6,126.23	16.73%	9.90	10.13%	5.99%
87	Bradley, Foster & Sargent	Hartford, Conn.	6,124.65	25.52%	3.75	17.30%	7.01%
88	Dowling & Yahnke Wealth Advisors	San Diego, Calif.	6,113.33	11.55%	4.34	5.94%	5.30%
89	BDF	Itasca, Ill.	5,917.75	10.27%	4.09	9.13%	1.05%
90	RGT Wealth Advisors	Dallas, Texas	5,751.17	18.33%	8.07	4.06%	13.72%
91	Caprock	Boise, Idaho	5,741.56	21.17%	22.17	4.32%	16.14%
92	WMS Partners	Towson, Md.	5,674.25	29.89%	12.15	18.49%	9.62%
93	Northside Capital Management	Hood River, Ore.	5,634.10	-3.59%	160.97	-9.10%	6.06%
94	Bailard, Inc.	Foster City, Calif.	5,633.15	27.45%	6.47	18.52%	7.53%
95	Alesco Advisors	Pittsford, N.Y.	5,465.58	12.57%	11.20	9.80%	2.52%
96	Ingalls & Snyder	New York, N.Y.	5,445.93	38.56%	1.29	28.92%	7.48%
97	Parallel Advisors	San Francisco, Calif.	5,443.16	42.81%	1.99	25.92%	13.41%
98	CI Brightworth	Atlanta, Ga.	5,364.75	17.00%	3.17	8.91%	7.43%
99	Advisors Capital Management	Ridgewood, N.J.	5,346.41	37.66%	0.66	11.54%	23.41%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-adviser to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
100	HBKS Wealth Advisors	Erie, Pa.	5,341.13	5.70%	0.94	3.05%	2.57%
101	GYL Financial Synergies	West Hartford, Conn.	5,316.70	12.33%	3.32	-5.41%	18.75%
102	Allegheny Financial Group	Pittsburgh, Pa.	5,129.02	32.21%	1.15	17.05%	12.95%
103	Fort Pitt Capital Group	Pittsburgh, Pa.	4,999.22	23.19%	1.65	12.49%	9.51%
104	Wilbanks, Smith & Thomas Asset Mgmt	Norfolk, Va.	4,970.41	23.82%	2.05	14.26%	8.37%
105	Crestwood Advisors	Boston, Mass.	4,963.45	25.24%	5.60	17.47%	6.62%
106	Index Fund Advisors	Irvine, Calif.	4,937.68	19.47%	2.08	18.42%	0.89%
107	Edge Capital Group	Atlanta, Ga.	4,884.23	12.98%	16.96	5.14%	7.46%
108	Geller Advisors	New York, N.Y.	4,837.44	5.00%	38.09	-5.75%	11.40%
109	Mission Wealth Management	Santa Barbara, Calif.	4,815.11	29.24%	2.36	3.67%	24.66%
110	Retirement Planners of America	Plano, Texas	4,804.87	3.81%	0.53	-3.82%	7.94%
111	Zhang Financial	Portage, Mich.	4,784.38	23.97%	2.94	15.66%	7.19%
112	Badgley Phelps Wealth Managers	Seattle, Wash.	4,769.43	24.91%	5.62	15.04%	8.58%
113	Beacon Capital Management	Dayton, Ohio	4,744.09	41.92%	0.47	33.69%	6.16%
114	JMG Financial Group	Downers Grove, Ill.	4,716.00	24.50%	3.58	9.09%	14.12%
115	Cassaday & Company	McLean, Va.	4,647.15	26.19%	1.71	20.38%	4.83%
116	Truepoint Wealth Counsel	Cincinnati, Ohio	4,642.98	20.14%	2.89	8.10%	11.14%
117	Annex Wealth Management	Elm Grove, Wis.	4,595.18	21.39%	0.79	10.93%	9.43%
118	Kovack Advisors	Fort Lauderdale, Fla.	4,547.28	29.24%	0.47	13.21%	14.15%
119	F.L.Putnam Investment Mgmt Company	Wellesley, Mass.	4,547.18	29.90%	3.21	-4.82%	36.48%
120	Camden Capital	North Palm Beach, Fla.	4,504.00	14.86%	10.70	-5.87%	22.03%
121	Inverness Counsel	New York, N.Y.	4,468.95	26.65%	11.92	58.40%	-20.04%
122	WA Asset Management	Birmingham, Ala.	4,465.84	28.25%	3.16	16.83%	9.78%
123	Finaccess Advisors	Miami, Fla.	4,446.18	-3.16%	39.70	-13.54%	12.00%
124	Gradient Investments	Arden Hills, Minn.	4,375.74	35.15%	0.24	14.32%	18.22%
125	Exencial Wealth Advisors	Oklahoma City, Okla.	4,360.55	24.95%	1.67	14.60%	9.03%
126	Crescent Grove Advisors	Lake Forest, Ill.	4,354.81	17.84%	13.20	-2.16%	20.44%
127	Brownson, Rehms & Foxworth	Chicago, Ill.	4,298.88	-28.65%	19.02	35.45%	-47.32%
128	Parsec Financial	Asheville, N.C.	4,226.30	23.29%	2.16	15.55%	6.70%
129	Covington Capital Management	Los Angeles, Calif.	4,204.19	17.30%	8.96	8.79%	7.82%
130	Clifford Swan Investment Counselors	Pasadena, Calif.	4,187.00	18.48%	4.49	14.67%	3.32%
131	Crestone Capital	Boulder, Colo.	4,174.50	34.19%	20.36	16.52%	15.17%
132	Bordeaux Wealth Advisors	Menlo Park, Calif.	4,107.87	18.38%	21.51	-1.45%	20.13%
133	Frontier Wealth Management	Kansas City, Mo.	4,102.34	12.01%	2.22	13.35%	-1.18%
134	Beacon Investment Advisory Services	Morristown, N.J.	4,093.00	10.47%	3.95	2.57%	7.70%
135	Prio Wealth	Boston, Mass.	4,081.46	16.06%	5.98	14.19%	1.64%
136	Advance Capital Management	Southfield, Mich.	4,069.54	17.92%	0.62	9.27%	7.92%
137	Pure Financial Advisors	San Diego, Calif.	4,003.36	30.37%	1.40	28.87%	1.17%
138	Carnegie Investment Counsel	Pepper Pike, Ohio	3,981.84	35.30%	1.64	17.21%	15.43%
139	Cary Street Partners Investment Advisory	Richmond, Va.	3,946.15	21.25%	1.23	16.83%	3.78%
140	Robertson Stephens Wealth Management	San Francisco, Calif.	3,930.99	87.53%	6.23	24.82%	50.24%
141	Mainstay Capital Management	Grand Blanc, Mich.	3,858.74	12.84%	1.01	9.75%	2.81%
142	Westmount Asset Management	Los Angeles, Calif.	3,837.49	23.05%	2.85	20.95%	1.74%
143	TCI Wealth Advisors	Tucson, Ariz.	3,764.47	18.30%	1.49	9.39%	8.15%
144	Merriman Wealth Management	Seattle, Wash.	3,694.33	21.79%	1.60	16.06%	4.94%
145	Hamilton Capital	Columbus, Ohio	3,634.51	24.85%	1.45	18.27%	5.56%
146	Heritage Investors Management Corporation	Bethesda, Md.	3,615.92	17.28%	5.05	15.15%	1.85%
147	Axxcess Wealth Management	Carlsbad, Calif.	3,588.52	71.15%	0.78	138.44%	-28.22%
148	TFO Phoenix	Phoenix, Ariz.	3,575.98	23.68%	18.53	6.38%	16.27%
149	TFO-TDC, LLC dba TDC Investment Advisory	Maumee, Ohio	3,551.09	22.47%	2.64	14.55%	6.92%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. †††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-adviser to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
150	JFS Wealth Advisors	Hermitage, Pa.	3,534.57	26.00%	1.69	26.90%	-0.71%
151	CM Wealth Advisors	Beachwood, Ohio	3,533.97	16.36%	19.74	10.51%	5.29%
152	Gratus Capital	Atlanta, Ga.	3,499.40	45.16%	3.97	17.81%	23.22%
153	Kingsview Partners	Grants Pass, Ore.	3,479.62	54.26%	0.73	15.57%	33.47%
154	Wescott Financial Advisory Group	Philadelphia, Pa.	3,452.85	41.48%	4.56	-3.56%	46.71%
155	Lake Street Advisors	Portsmouth, N.H.	3,395.38	16.66%	42.44	-0.84%	17.65%
156	Foster Group	West Des Moines, Iowa	3,393.38	28.57%	1.99	18.34%	8.65%
157	Accredited Investors Wealth Management	Edina, Minn.	3,383.26	26.44%	5.80	19.06%	6.19%
158	Telemus Capital	Southfield, Mich.	3,361.84	5.15%	2.11	6.27%	-1.06%
159	HoyleCohen	San Diego, Calif.	3,236.70	17.01%	2.70	40.90%	-16.96%
160	Foundations Investment Advisors	Phoenix, Ariz.	3,177.66	70.84%	0.26	17.77%	45.05%
161	Carlson Capital Management	Northfield, Minn.	3,164.54	21.88%	2.59	11.52%	9.29%
162	Chicago Capital	Chicago, Ill.	3,154.51	17.78%	5.51	6.06%	11.05%
163	Family Management Corporation	New York, N.Y.	3,148.96	19.86%	4.32	11.15%	7.84%
164	GM Advisory Group	Melville, N.Y.	3,141.40	12.03%	5.62	2.61%	9.18%
165	Klingman & Associates	New York, N.Y.	3,120.21	15.54%	5.67	2.09%	13.17%
166	Wellesley Asset Management	Wellesley, Mass.	3,118.89	11.94%	1.70	1.02%	10.80%
167	Miracle Mile Advisors	Los Angeles, Calif.	3,067.35	52.39%	3.07	-43.62%	170.27%
168	Halbert Hargrove	Long Beach, Calif.	3,030.98	9.70%	4.10	1.10%	8.50%
169	Beaumont Financial Partners	Needham, Mass.	3,027.04	23.42%	5.50	12.20%	10.00%
170	Constellation Wealth Advisors	Cincinnati, Ohio	3,018.11	50.48%	11.74	66.87%	-9.82%
171	Sage Financial Group	Conshohocken, Pa.	3,015.93	17.81%	3.84	9.56%	7.53%
172	LaSalle St. Investment Advisors	Elmhurst, Ill.	2,947.62	38.34%	0.38	4.62%	32.23%
173	Barrett Asset Management	New York, N.Y.	2,937.34	38.22%	5.23	33.06%	3.88%
174	Wealthcare Capital Management	Richmond, Va.	2,916.98	26.03%	0.64	10.24%	14.33%
175	True North Advisors	Dallas, Texas	2,871.74	22.82%	4.62	15.32%	6.51%
176	AJ Wealth	New York, N.Y.	2,856.39	40.23%	10.39	22.89%	14.11%
177	Coastal Bridge Advisors	Westport, Conn.	2,854.86	3.46%	9.52	-5.16%	9.09%
178	Connectus Wealth Advisers [‡]	Greenwich, Conn.	2,845.10	33.49%	0.73	18.56%	12.60%
179	Radnor Financial Advisors	Wayne, Pa.	2,814.39	20.70%	4.65	2.34%	17.93%
180	Henssler Financial	Kennesaw, Ga.	2,775.78	18.77%	1.96	6.10%	11.94%
181	JFG Wealth Management ^{††}	Denver, Colo.	2,750.62	66.81%	23.71	39.48%	19.59%
182	Arnerich Massena	Portland, Ore.	2,749.52	-65.16%	8.41	-64.63%	-1.51%
183	GenTrust	Miami, Fla.	2,744.35	18.05%	9.87	7.86%	9.45%
184	Evensky & Katz	Coral Gables, Fla.	2,741.46	15.85%	2.63	8.84%	6.44%
185	MCF Advisors	Covington, Ky.	2,695.57	24.32%	3.30	13.97%	9.08%
186	IFG Advisory	Atlanta, Ga.	2,691.76	24.63%	0.50	46.94%	-15.19%
187	Altium Wealth Management	Purchase, N.Y.	2,686.67	35.84%	2.83	27.42%	6.61%
188	SJS Investment Services	Sylvania, Ohio	2,675.95	6.61%	3.08	0.48%	6.10%
189	Resource Consulting Group	Orlando, Fla.	2,642.74	20.48%	5.08	9.83%	9.70%
190	Zemenick & Walker	St. Louis, Mo.	2,557.98	16.01%	10.79	9.16%	6.28%
191	Birch Hill Investment Advisors	Boston, Mass.	2,511.07	15.95%	13.72	14.68%	1.10%
192	Chesley, Taft & Associates	Chicago, Ill.	2,492.79	16.16%	6.91	15.84%	0.28%
193	Cabana Asset Management	Fayetteville, Ark.	2,487.88	67.93%	6.72	3200.43%	-94.91%
194	Greenwich Wealth Management	Greenwich, Conn.	2,482.10	12.97%	11.99	-2.86%	16.29%
195	Schneider Downs Wealth Mgmt Advisors	Pittsburgh, Pa.	2,471.84	16.88%	3.53	11.03%	5.26%
196	The Welch Group	Birmingham, Ala.	2,449.94	28.23%	2.11	21.61%	5.44%
197	Pittenger & Anderson	Lincoln, Neb.	2,423.73	18.44%	3.12	7.18%	10.51%
198	Morton Wealth	Calabasas, Calif.	2,416.28	9.29%	2.26	3.55%	5.54%
199	Financial Advisory Service	Leawood, Kan.	2,411.29	28.16%	1.98	19.63%	7.14%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. †††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-adviser to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
 For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
200	Retirement Income Solutions	Ann Arbor, Mich.	2,403.82	12.81%	1.93	9.37%	3.15%
201	Connecticut Wealth Management	Farmington, Conn.	2,385.20	13.81%	2.67	4.40%	9.01%
202	Summitry	Foster City, Calif.	2,382.31	21.66%	2.01	16.33%	4.59%
203	Apella Capital	Glastonbury, Conn.	2,357.00	41.82%	0.97	16.86%	21.36%
204	Relative Value Partners	Northbrook, Ill.	2,309.02	45.20%	7.22	18.88%	22.14%
205	West Financial Services	McLean, Va.	2,283.30	17.54%	2.59	8.36%	8.48%
206	XML Financial Group	Rockville, Md.	2,257.74	77.54%	1.12	24.50%	42.60%
207	Osborne Partners Capital Management	San Francisco, Calif.	2,243.25	27.24%	3.44	11.43%	14.19%
208	Vigilant Capital Management	Portland, Maine	2,240.16	28.28%	4.85	16.90%	9.74%
209	Heritage Financial Services	Westwood, Mass.	2,228.36	22.10%	2.10	12.53%	8.50%
210	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	2,216.80	29.01%	2.09	13.58%	13.58%
211	LWV Advisors	Pittsford, N.Y.	2,201.07	5.92%	5.13	3.70%	2.14%
212	Beirne Wealth Consulting Services	Shelton, Conn.	2,196.43	15.90%	5.37	4.28%	11.14%
213	RTD Financial Advisors	Philadelphia, Pa.	2,191.56	16.76%	3.39	12.79%	3.52%
214	Principle Wealth Partners	Madison, Conn.	2,190.00	24.50%	2.44	10.79%	12.38%
215	Courier Capital	Buffalo, N.Y.	2,180.33	6.67%	2.68	6.01%	0.62%
216	Certified Advisory Corp	Altamonte Springs, Fla.	2,178.85	21.92%	1.98	N/A	N/A
217	CPS Investment Advisors	Lakeland, Fla.	2,172.88	27.63%	0.70	12.07%	13.89%
218	Marcum Wealth	Cleveland, Ohio	2,171.46	110.40%	0.89	22.97%	71.10%
219	SteelPeak Wealth	Woodland Hills, Calif.	2,163.66	96.01%	1.37	79.22%	9.37%
220	BerganKDV Wealth Management	Bloomington, Minn.	2,142.63	59.55%	2.21	39.81%	14.12%
221	Capstone Financial Advisors	Downers Grove, Ill.	2,098.96	14.28%	3.71	6.81%	6.99%
222	McKinley Carter Wealth Services	Wheeling, W.Va.	2,094.89	15.44%	1.31	4.62%	10.34%
223	CFS Investment Advisory Services	Totowa, N.J.	2,083.42	22.25%	3.79	11.13%	10.00%
224	Legacy Wealth Management	Memphis, Tenn.	2,076.49	19.51%	1.68	5.85%	12.90%
225	BLB&B Advisors	Montgomeryville, Pa.	2,065.09	22.31%	1.69	16.79%	4.73%
226	Regal Investment Advisors	Kentwood, Mich.	2,058.02	6.30%	0.34	19.24%	-10.85%
227	Foster & Motley	Cincinnati, Ohio	2,057.59	19.13%	2.73	8.70%	9.59%
228	Fairway Wealth Management	Independence, Ohio	2,023.38	9.55%	7.55	2.19%	7.20%
229	Capital Wealth Advisors	Naples, Fla.	2,018.79	21.48%	1.78	17.83%	3.09%
230	Colorado Financial Management	Boulder, Colo.	2,000.00	25.00%	2.22	11.11%	12.50%
231	Pinnacle Wealth Planning Services	Mansfield, Ohio	1,991.86	32.58%	2.27	19.58%	10.87%
232	Gamble Jones Investment Counsel	Pasadena, Calif.	1,986.88	15.79%	3.28	14.26%	1.34%
233	Guyasuta Investment Advisors	Pittsburgh, Pa.	1,985.80	19.23%	4.96	14.76%	3.90%
234	Inspire Investing	Meridian, Idaho	1,984.84	51.02%	0.91	9.57%	37.83%
235	SFMG Wealth Advisors	Plano, Texas	1,975.36	18.40%	3.11	12.81%	4.95%
236	Polaris Wealth Advisory Group	San Rafael, Calif.	1,962.33	40.45%	1.39	0.03%	40.42%
237	Main Street Research	Sausalito, Calif.	1,957.76	40.50%	2.35	-2.34%	43.87%
238	Artemis Wealth Advisors	New York, N.Y.	1,946.39	12.83%	92.69	7.46%	5.00%
239	Glassman Wealth Services	Vienna, Va.	1,942.82	16.88%	6.48	12.98%	3.45%
240	Windsor Wealth Management	Indianapolis, Ind.	1,941.42	15.55%	2.02	10.38%	4.68%
241	Bogart Wealth	McLean, Va.	1,925.11	46.76%	1.87	22.44%	19.86%
242	LBMC Investment Advisors	Brentwood, Tenn.	1,896.87	25.07%	3.99	16.12%	7.71%
243	IPI Wealth Management	Decatur, Ill.	1,883.81	55.71%	0.23	24.05%	25.52%
244	Ashfield Capital Partners	San Francisco, Calif.	1,861.13	25.44%	10.95	25.44%	0.00%
245	Sadoff Investment Management	Milwaukee, Wis.	1,859.84	26.18%	3.05	26.39%	-0.16%
246	Strategic Financial Services	Utica, N.Y.	1,838.07	16.18%	1.66	10.73%	4.92%
247	Ensemble Capital	San Francisco, Calif.	1,821.91	30.21%	6.37	11.54%	16.73%
248	Stonebridge Capital Advisors	Saint Paul, Minn.	1,805.01	16.85%	1.42	10.67%	5.58%
249	ProVise Management Group	Clearwater, Fla.	1,769.26	2.86%	1.28	-12.66%	17.78%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ††Pan Global Advisors is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
 For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
250	Prosperity Capital Advisors ^{†††}	Westlake, Ohio	1,737.14	16.79%	0.49	6.83%	9.32%
251	Independent Asset Advisors	Wynnewood, Pa.	1,717.39	22.78%	107.34	15.11%	6.67%
252	Cornerstone Advisory	Hunt Valley, Md.	1,702.23	19.09%	2.01	1.35%	17.50%
253	Condor Capital Wealth Management	Martinsville, N.J.	1,675.86	24.05%	2.15	14.35%	8.48%
254	Wealthquest	Cincinnati, Ohio	1,673.99	24.16%	1.20	17.38%	5.78%
255	Trilogy Capital	Huntington Beach, Calif.	1,668.53	22.14%	0.23	16.39%	4.95%
256	California Financial Advisors	San Ramon, Calif.	1,649.11	13.21%	1.25	10.20%	2.73%
257	Fairview Capital	Greenbrae, Calif.	1,646.33	18.97%	7.73	12.83%	5.45%
258	Round Table Wealth Management	Westfield, N.J.	1,636.57	24.98%	4.93	3.15%	21.17%
259	Meyer Capital Group	Marlton, N.J.	1,635.85	23.33%	2.07	17.09%	5.33%
260	Patriot Investment Management	Knoxville, Tenn.	1,610.71	20.81%	0.85	11.78%	8.07%
261	Durbin Bennett Private Wealth Management	Austin, Texas	1,605.14	24.83%	5.46	23.98%	0.68%
262	Van Hulzen Asset Management	El Dorado Hills, Calif.	1,601.87	22.36%	0.80	12.80%	8.47%
263	Baltimore Washington Financial Advisors	Columbia, Md.	1,600.00	28.00%	1.78	10.93%	15.38%
264	Elsner Financial Planning	Indianapolis, Ind.	1,579.10	48.58%	5.33	25.49%	18.40%
265	Altfest Personal Wealth Management	New York, N.Y.	1,555.26	3.67%	2.39	1.27%	2.36%
266	United Asset Strategies	Garden City, N.Y.	1,542.90	20.77%	1.33	10.59%	9.20%
267	Beard Harris Wealth Management	Dallas, Texas	1,522.71	20.65%	2.15	15.55%	4.42%
268	ML&R Wealth Management	Austin, Texas	1,502.17	12.39%	2.47	1.30%	10.95%
269	Cable Hill Partners	Portland, Ore.	1,499.00	24.92%	3.07	15.19%	8.44%
270	Tschetter Group	Bellevue, Wash.	1,471.83	33.44%	4.91	15.65%	15.38%
271	UMAFS	Salt Lake City, Utah	1,468.61	12.08%	1.36	1.53%	10.40%
272	Diversified Portfolios	Bloomfield Hills, Mich.	1,466.34	21.88%	2.80	15.83%	5.22%
273	Aveo Capital Partners	Englewood, Colo.	1,453.32	41.41%	1.32	63.48%	-13.50%
274	AlphaCore Wealth Advisory	La Jolla, Calif.	1,440.00	11.55%	1.67	-1.16%	12.86%
275	Sather Financial Group	Victoria, Texas	1,430.98	36.52%	3.12	26.68%	7.76%
276	RKL Wealth Management	Lancaster, Pa.	1,430.35	16.56%	1.67	13.96%	2.28%
277	Paragon Capital Management	Denver, Colo.	1,423.04	27.47%	9.06	20.16%	6.08%
278	Quadrant Private Wealth	Bethlehem, Pa.	1,410.01	42.15%	2.12	36.81%	3.91%
279	TFC Financial Management	Boston, Mass.	1,394.09	15.52%	3.66	9.76%	5.25%
280	Per Stirling Capital Management	Austin, Texas	1,372.99	11.26%	1.26	17.08%	-4.97%
281	Austin Asset	Austin, Texas	1,366.01	16.08%	3.24	7.81%	7.67%
282	3EDGE Asset Management	Boston, Mass.	1,365.18	18.73%	2.14	-23.14%	54.48%
283	SAX Wealth Advisors	Parsippany, N.J.	1,360.87	24.48%	1.76	15.97%	7.34%
284	Nadler Financial Group	Deerfield, Ill.	1,360.47	17.46%	1.54	11.20%	5.63%
285	R W Investment Management	Boise, Idaho	1,356.05	8.77%	1.61	5.54%	3.06%
286	Smith Anglin Financial	Dallas, Texas	1,307.93	30.57%	1.17	18.77%	9.94%
287	Madison Wealth Management	Cincinnati, Ohio	1,293.78	24.30%	2.41	13.42%	9.59%
288	Azzad Asset Management	Falls Church, Va.	1,276.91	20.06%	0.97	15.33%	4.10%
289	RK Capital	Knoxville, Tenn.	1,271.37	20.22%	1.29	10.47%	8.82%
290	Valley National Financial Advisors	Bethlehem, Pa.	1,254.69	13.49%	0.53	4.51%	8.60%
291	Romano Wealth Management	Evanston, Ill.	1,254.16	14.71%	1.70	13.00%	1.51%
292	Prism Financial Group	Overland Park, Kan.	1,252.84	29.81%	1.88	19.90%	8.27%
293	Prudent Investor Advisors	Folsom, Calif.	1,248.04	39.15%	9.91	15.96%	20.00%
294	Diversified	Wilmington, Del.	1,235.00	35.01%	1.01	10.16%	22.56%
295	Rollins Financial Advisors	Atlanta, Ga.	1,225.52	17.14%	1.27	11.45%	5.11%
296	TrinityPoint Wealth	Milford, Conn.	1,224.80	18.15%	1.38	3.48%	14.18%
297	Weatherly Asset Management	Del Mar, Calif.	1,218.85	20.43%	3.28	14.60%	5.08%
298	Avitas Wealth Management	Los Angeles, Calif.	1,214.83	16.65%	5.70	3.51%	12.70%
299	Segment Wealth Management	Houston, Texas	1,210.37	34.06%	6.34	36.17%	-1.55%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. †††AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ††††Pan Global Advisors is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. ††††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
300	JB Capital	Wethersfield, Conn.	1,208.95	34.83%	0.25	16.99%	15.24%
301	Telos Capital Management	San Diego, Calif.	1,197.35	17.68%	1.57	4.14%	13.00%
302	Red Door Wealth Management	Memphis, Tenn.	1,187.95	44.11%	2.01	3.39%	39.39%
303	Patton Albertson Miller Group	Chattanooga, Tenn.	1,184.31	35.90%	2.10	8.24%	25.56%
304	Magnus Financial Group	New York, N.Y.	1,180.02	-35.16%	1.67	-38.18%	4.89%
305	StraightLine Group	Troy, Mich.	1,179.19	11.58%	0.45	-14.20%	30.04%
306	Intelligence Driven Advisers	Carlsbad, Calif.	1,169.50	10.29%	1.00	-5.75%	17.02%
307	Traphagen Investment Advisors	Oradell, N.J.	1,161.12	25.90%	0.76	16.79%	7.79%
308	Wealthstream Advisors	New York, N.Y.	1,157.00	19.43%	3.01	11.96%	6.67%
309	Financial Synergies Wealth Advisors	Houston, Texas	1,155.37	19.00%	1.71	8.77%	9.40%
310	BigSur Partners	Miami, Fla.	1,153.34	13.71%	60.70	19.70%	-5.00%
311	SPC Financial	Rockville, Md.	1,145.12	19.89%	0.94	9.58%	9.41%
312	Cahaba Wealth Management	Atlanta, Ga.	1,142.78	20.30%	1.65	1.20%	18.87%
313	Retirement Investment Advisors	Oklahoma City, Okla.	1,131.46	17.87%	0.91	27.92%	-7.86%
314	PDS Planning	Dublin, Ohio	1,131.18	20.12%	1.90	18.70%	1.19%
315	The Advisory Group San Francisco	San Francisco, Calif.	1,114.73	5.00%	7.01	5.66%	-0.63%
316	BFSG	Irvine, Calif.	1,104.64	16.17%	1.48	9.93%	5.67%
317	Blue Chip Partners	Farmington Hills, Mich.	1,098.78	27.46%	1.64	0.11%	27.32%
318	Corrigan Financial	Middletown, R.I.	1,086.61	15.11%	1.04	10.04%	4.60%
319	Delta Financial Group	Basking Ridge, N.J.	1,076.24	18.07%	1.76	36.43%	-13.46%
320	Mayflower Advisors	Boston, Mass.	1,074.74	19.20%	1.35	-10.15%	32.67%
321	Virtue Capital Management	Brentwood, Tenn.	1,071.52	53.00%	0.16	84.21%	-16.94%
322	Agili	Richmond, Va.	1,066.54	20.57%	3.31	17.57%	2.55%
323	Christopher Weil & Company	San Diego, Calif.	1,062.28	19.02%	2.05	25.47%	-5.14%
324	Titleist Asset Management	San Antonio, Texas	1,059.17	27.43%	0.84	3.87%	22.68%
325	NEIRG Wealth Management	North Andover, Mass.	1,027.57	34.15%	1.22	21.53%	10.38%
326	Beacon Financial Group	Dallas, Texas	1,020.14	17.81%	1.23	12.68%	4.55%
327	Pinkerton Retirement Specialists	Coeur D'Alene, Idaho	1,020.00	14.29%	1.30	9.77%	4.11%
328	Petersen Hastings Investment Management	Kennewick, Wash.	1,011.69	20.73%	1.16	6.48%	13.38%
329	Nilsine Partners	Greenwood Village, Colo.	1,009.27	N/A†	2.82	N/A†	N/A†
330	Apriem Advisors	Irvine, Calif.	1,007.89	15.07%	1.41	7.51%	7.03%
331	Financial Planning & Information Services	De Pere, Wis.	1,007.52	15.23%	0.92	8.14%	6.55%
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION							
332	Janiczek Wealth Management	Denver, Colo.	985.25	26.29%	6.16	6.56%	18.52%
333	Spectrum Wealth Management	Indianapolis, Ind.	977.12	37.37%	4.23	32.02%	4.05%
334	MJP Wealth Advisors	Farmington, Conn.	967.28	40.56%	1.39	30.48%	7.73%
335	Kowal Investment Group	Waukesha, Wis.	960.97	1.16%	0.80	-7.27%	9.09%
336	REDW Wealth	Albuquerque, N.M.	955.10	16.07%	2.49	6.40%	9.09%
337	Seasons of Advice Wealth Management	New York, N.Y.	944.11	17.07%	1.26	10.53%	5.92%
338	Hemington Wealth Management	Falls Church, Va.	934.28	23.60%	4.56	6.11%	16.48%
339	Total Wealth Planning	Cincinnati, Ohio	932.51	27.19%	1.82	11.79%	13.78%
340	Destiny Wealth Partners	Tavares, Fla.	931.15	37.14%	1.04	22.00%	12.41%
341	DiNuzzo Private Wealth	Beaver, Pa.	929.49	16.92%	1.13	7.01%	9.26%
342	Vintage Financial Services	Ann Arbor, Mich.	923.41	18.50%	1.74	16.27%	1.92%
343	Moisand Fitzgerald Tamayo	Orlando, Fla.	921.97	24.13%	1.26	4.21%	19.12%
344	Willis Johnson & Associates	Houston, Texas	914.87	26.72%	2.46	13.44%	11.71%
345	WPWealth	Fort Worth, Texas	914.56	25.97%	2.09	16.75%	7.90%
346	LS Investment Advisors dba LSIA	Bloomfield Hills, Mich.	912.86	-85.85%	4.93	-79.57%	-30.71%
347	Fusion Family Wealth	Woodbury, N.Y.	912.21	11.52%	2.94	4.32%	6.90%
348	Regatta Capital Group	El Segundo, Calif.	906.87	32.84%	1.00	14.28%	16.24%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-adviser to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
349	SoundPath Investment Advisors	Ridgeland, Miss.	904.36	12.58%	1.70	10.47%	1.91%
350	Delegate Advisors	Chapel Hill, N.C.	903.33	-4.58%	23.16	-16.82%	14.71%
351	HCM Wealth Advisors	Cincinnati, Ohio	894.57	16.49%	1.25	12.58%	3.48%
352	Archford	Swansea, Ill.	889.99	9.83%	1.54	9.45%	0.35%
353	Lake Street	Chicago, Ill.	880.78	72.78%	1.68	14.20%	51.30%
354	Halpern Financial	Ashburn, Va.	863.21	25.68%	2.94	15.42%	8.89%
355	Financial Advisory Corporation	Grand Rapids, Mich.	854.33	16.83%	3.90	12.03%	4.29%
356	Yeske Buie	San Francisco, Calif.	852.39	18.04%	3.27	18.04%	0.00%
357	Southern Financial Group	Birmingham, Ala.	837.33	18.70%	0.89	28.70%	-7.77%
358	Stage Harbor Financial	Needham, Mass.	836.37	16.45%	3.19	6.23%	9.62%
359	WorthPointe	San Diego, Calif.	816.83	18.20%	1.48	8.99%	8.45%
360	Concentus Wealth Advisors	Newtown Square, Pa.	794.76	36.30%	3.18	30.84%	4.17%
361	Abound Wealth Management	Franklin, Tenn.	791.40	57.84%	1.83	26.78%	24.50%
362	Blankinship & Foster	Solana Beach, Calif.	786.49	8.90%	2.61	7.09%	1.69%
363	Buckingham Advisors	Dayton, Ohio	785.57	18.75%	0.67	11.80%	6.22%
364	Canal Capital Management	Richmond, Va.	785.01	24.85%	2.07	30.12%	-4.05%
365	Ullmann Wealth Partners	Jacksonville Beach, Fla.	765.23	31.43%	2.10	27.83%	2.82%
366	Claro Advisors	Boston, Mass.	762.99	29.69%	1.01	6.96%	21.25%
367	Insight Wealth Partners	Plano, Texas	760.13	33.48%	1.01	17.59%	13.51%
368	CapSouth Wealth Management	Dothan, Ala.	759.00	15.53%	1.77	5.83%	9.16%
369	Rappaport Reiches Capital Management	Skokie, Ill.	745.00	13.74%	2.28	0.18%	13.54%
370	Socius Family Office	Fort Lauderdale, Fla.	733.69	25.60%	6.67	19.89%	4.76%
371	Omega Wealth Partners	Fort Worth, Texas	732.55	21.45%	2.25	30.79%	-7.14%
372	William Mack & Associates	Troy, Mich.	726.57	9.29%	0.89	-0.50%	9.84%
373	Fairhaven Wealth Management	Wheaton, Ill.	718.97	-0.78%	1.50	-2.02%	1.27%
374	Asset Management Group	Stamford, Conn.	704.16	18.16%	2.68	17.26%	0.77%
375	Financial Enhancement Group	Anderson, Ind.	703.48	19.51%	0.23	13.03%	5.73%
376	Glass Jacobson Investment Advisors	Owings Mills, Md.	693.97	30.34%	1.27	29.87%	0.37%
377	Great Lakes Retirement	Sheffield Village, Ohio	691.51	27.64%	0.40	19.95%	6.41%
378	Droms Strauss Wealth Management	St. Louis, Mo.	686.98	31.17%	1.88	24.71%	5.19%
379	Briaud Financial Advisors	College Station, Texas	683.31	2.06%	2.55	0.92%	1.13%
380	The L. Warner Companies	Timonium, Md.	681.96	26.58%	2.12	6.53%	18.82%
381	Omnia Family Wealth	Aventura, Fla.	677.92	11.04%	9.04	0.68%	10.29%
382	Klaas Financial Asset Advisors	Loves Park, Ill.	675.00	11.57%	0.61	11.57%	0.00%
383	Next Level Private	Harrison, N.Y.	670.00	0.00%	2.03	0.00%	0.00%
384	Spectrum Investment Advisors	Mequon, Wis.	667.52	44.73%	1.99	34.39%	7.69%
385	Frisch Financial Group	Melville, N.Y.	660.58	16.93%	1.36	13.32%	3.18%
386	Investmark Advisory Group	Shelton, Conn.	653.48	42.29%	1.12	35.21%	5.23%
387	KMH Wealth Management	Victoria, Texas	650.77	14.32%	1.28	7.14%	6.69%
388	Tobias Financial Advisors	Plantation, Fla.	650.00	26.71%	2.22	11.14%	14.01%
389	Optas Capital	Austin, Texas	647.53	8.18%	5.14	-4.70%	13.51%
390	McIlrath & Eck	Arlington, Wash.	645.00	29.00%	0.72	21.83%	5.88%
391	Dopkins Wealth Management	Williamsville, N.Y.	637.19	8.11%	2.16	11.78%	-3.28%
392	Mirador Capital Partners	Pleasanton, Calif.	632.11	17.93%	1.15	7.21%	10.00%
393	BlueSky Wealth Advisors	New Bern, N.C.	628.19	12.02%	1.85	5.43%	6.25%
394	Nelson Capital Management	Menlo Park, Calif.	626.08	5.71%	4.20	-2.09%	7.97%
395	Sterling Financial Planning	Sparta, N.J.	621.70	15.09%	1.15	5.31%	9.29%
396	Greystone Financail Group	Bloomfield Hills, Mich.	617.55	13.67%	0.90	10.01%	3.32%
397	Rowling & Associates	San Diego, Calif.	615.51	16.46%	1.77	8.07%	7.76%
398	Financial Management Strategies	Broadview Heights, Ohio	608.03	15.78%	0.42	21.98%	-5.08%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. †††Pan Global Advisors is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-adviser to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
399	Fi3 Financial Advisors	Indianapolis, Ind.	606.19	79.96%	3.89	134.18%	-23.15%
400	Frazier Financial Advisors	Upper Arlington, Ohio	595.00	16.67%	1.32	3.70%	12.50%
401	Carolina Wealth Management	Greenville, N.C.	589.48	32.69%	1.21	27.81%	3.82%
402	Birchwood Financial Partners	Edina, Minn.	583.81	30.82%	1.46	28.85%	1.53%
403	Grand Wealth Management	Grand Rapids, Mich.	582.33	19.45%	3.45	8.85%	9.74%
404	Net Worth Advisory Group	Sandy, Utah	581.69	16.60%	0.88	6.69%	9.29%
405	The High Net Worth Advisory Group	Naples, Fla.	581.00	44.04%	1.79	-0.28%	44.44%
406	Excalibur Management Corp.	Newton Lower Falls, Mass.	571.99	10.21%	1.90	7.65%	2.38%
407	Marotta Wealth Management	Charlottesville, Va.	569.58	21.00%	1.59	37.56%	-12.04%
408	Peavine Capital	Reno, Nev.	569.00	5.76%	21.07	5.76%	0.00%
409	Elwood & Goetz Wealth Advisory Group	Athens, Ga.	558.46	33.13%	1.12	7.68%	23.63%
410	Level Financial Advisors	Amherst, N.Y.	545.20	14.35%	0.89	15.84%	-1.29%
411	Financial Insights Wealth Management	Tacoma, Wash.	533.63	25.21%	1.07	18.95%	5.26%
412	Hopwood Financial Services	Reston, Va.	531.77	17.68%	1.93	6.98%	10.00%
413	Jentner Wealth Management	Akron, Ohio	529.60	17.07%	1.74	12.08%	4.45%
414	NBC Capital Advisors	Beaverton, Ore.	515.00	31.04%	1.17	13.17%	15.79%
415	J.W. Coons Advisors	Columbus, Ohio	514.55	12.85%	3.55	17.52%	-3.97%
416	Gradient Capital Advisors	San Diego, Calif.	512.65	21.80%	1.20	20.94%	0.71%
417	Woodward Financial Advisors	Chapel Hill, N.C.	511.25	29.55%	2.84	22.35%	5.88%
418	Sikich Capital Management	Springfield, Ill.	504.18	14.47%	0.67	5.30%	8.71%
419	Morling Financial Advisors	Fremont, Calif.	501.41	39.46%	1.76	26.74%	10.04%
ASSET CATEGORY: \$250 MILLION TO <\$500 MILLION							
420	Mission Creek Capital Partners	San Francisco, Calif.	493.16	5.74%	1.54	1.44%	4.23%
421	Wealth Care	Merritt Island, Fla.	488.00	10.88%	2.27	3.15%	7.50%
422	Perspective Wealth Partners	Boise, Idaho	476.36	29.67%	2.25	6.42%	21.84%
423	Ballast, Inc	Lexington, Ky.	462.99	29.18%	1.22	21.66%	6.18%
424	Pinnacle Financial Group	Western Springs, Ill.	458.81	18.93%	1.37	14.30%	4.05%
425	Financial Alternatives	La Jolla, Calif.	458.55	87.04%	1.79	6.67%	75.34%
426	WJ Interests	Sugar Land, Texas	455.00	16.67%	2.09	16.13%	0.46%
427	Meritas Wealth Management	Larkspur, Calif.	454.56	6.93%	1.88	3.39%	3.42%
428	Falcon Wealth Planning	Ontario, Calif.	452.00	54.79%	0.58	18.31%	30.83%
429	Asset Planning	Cypress, Calif.	446.70	18.44%	1.33	10.68%	7.01%
430	Wilsey Asset Management	San Diego, Calif.	443.94	23.22%	0.62	11.52%	10.49%
431	Resolute Financial	Newburyport, Mass.	443.78	18.42%	1.34	14.83%	3.13%
432	Clune & Associates	Chicago, Ill.	438.50	18.71%	2.28	12.52%	5.49%
433	Winch Financial	Appleton, Wis.	433.31	20.73%	0.51	13.49%	6.38%
434	Monument Wealth Management	Alexandria, Va.	424.89	36.02%	2.04	24.25%	9.47%
435	Transitions Wealth Management	Denver, Colo.	423.41	21.56%	1.12	16.09%	4.71%
436	QP Consulting	Takoma Park, Md.	422.51	16.13%	7.16	-1.58%	18.00%
437	Palisade Investments	Zephyr Cove, Nev.	421.01	13.68%	0.86	-4.80%	19.42%
438	Fiduciary Wealth Management	Reston, Va.	420.54	4.46%	1.11	20.13%	-13.04%
439	Regency Wealth Management	Ramsey, N.J.	416.26	9.98%	1.61	11.68%	-1.52%
440	THOR Wealth Management	Cincinnati, Ohio	414.80	15.35%	1.05	24.70%	-7.49%
441	Day and Ennis	Macon, Ga.	412.48	14.23%	1.53	9.14%	4.67%
442	Alpha Financial Advisors	Charlotte, N.C.	412.34	20.45%	1.76	13.76%	5.88%
443	ARQ Wealth Advisors	Scottsdale, Ariz.	412.00	27.22%	1.46	12.33%	13.25%
444	Family Office Research	bethesda, Md.	403.80	12.71%	5.18	5.48%	6.85%
445	Andrews, Lucia Wealth Management	Danville, Calif.	402.99	19.36%	2.18	13.55%	5.11%
446	Manske Wealth Management	Houston, Texas	395.83	28.50%	1.06	10.93%	15.84%
447	KCS Wealth Advisory	Los Angeles, Calif.	386.83	42.11%	1.29	32.63%	7.14%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-adviser to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
448	Poehling Capital Management	Madison, Wis.	381.27	20.61%	1.10	27.56%	-5.45%
449	ShoreHaven Wealth Partners	Red Bank, N.J.	381.03	10.14%	1.25	-4.35%	15.15%
450	Sandbox Financial Partners	Bethesda, Md.	380.54	50.52%	1.09	33.75%	12.54%
451	Allodium Investment Consultants	Minneapolis, Minn.	374.65	10.15%	1.69	9.15%	0.91%
452	McCarthy Asset Management, Inc.	Redwood Shores, Calif.	374.03	13.22%	1.67	13.73%	-0.44%
453	Searcy Financial Services	Overland Park, Kan.	364.28	17.64%	1.89	5.45%	11.56%
454	Trinity Financial Advisors	Columbus, Ohio	360.57	26.00%	2.37	7.76%	16.92%
455	Socha Financial Group	Corning, N.Y.	357.37	17.32%	N/A	N/A	N/A
456	Baron Financial Group	Fair Lawn, N.J.	347.04	20.22%	1.05	8.52%	10.77%
457	Harbor Financial Grp dba Harbor Wealth Mgmt	Boulder, Colo.	341.17	23.72%	1.85	8.93%	13.58%
458	Tim Looney Investments	Lake Mary, Fla.	338.32	17.47%	0.87	11.45%	5.41%
459	Asset Planning Corporation	Knoxville, Tenn.	326.56	23.93%	1.44	12.47%	10.19%
460	Samalin Wealth	Chappaqua, N.Y.	325.49	19.63%	0.69	3.95%	15.09%
461	Legacy Consulting Group	Plano, Texas	325.11	14.73%	2.15	1.81%	12.69%
462	Fiduciary Financial Advisors	Grand Rapids, Mich.	323.70	85.93%	0.37	-18.19%	127.27%
463	Fidato Wealth	Middleburg Heights, Ohio	311.12	20.42%	1.13	16.04%	3.77%
464	Sebold Capital Management	Lisle, Ill.	305.96	19.33%	2.97	15.85%	3.00%
465	WealthCrest Financial Services	Springfield, Va.	305.75	16.92%	0.89	2.01%	14.62%
466	Sard Wealth Management Group	Atlanta, Ga.	305.65	18.21%	1.11	15.22%	2.60%
467	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	302.54	18.79%	1.94	10.42%	7.59%
468	Fortune Wealth Management	Dallas, Texas	300.01	3.48%	1.37	3.01%	0.46%
469	Hixon Zuercher Capital Management	Findlay, Ohio	299.72	35.11%	0.93	24.23%	8.75%
470	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	295.55	24.84%	0.80	13.34%	10.15%
471	TL Private Wealth	Southlake, Texas	292.00	26.96%	1.22	16.38%	9.09%
472	Family Wealth Advisory Group	Cincinnati, Ohio	265.92	14.88%	1.45	11.76%	2.79%
473	Artemis Financial Advisors	Boston, Mass.	265.37	21.49%	3.79	-1.08%	22.81%
474	Wealthview Capital	Jackson, Miss.	264.08	4.07%	1.44	1.81%	2.22%
475	MBM Wealth Consultants	Chesterfield, Mo.	258.68	20.56%	0.52	24.21%	-2.94%
476	Advisors Financial	Vienna, Va.	257.20	10.13%	1.21	-0.73%	10.94%
477	Pearson Creek Capital Management	Chicago, Ill.	257.00	19.53%	12.85	-10.35%	33.33%
478	Hanover Advisors	Greenville, S.C.	256.98	11.36%	0.40	-6.83%	19.52%
479	Life Planning Partners	Jacksonville, Fla.	256.29	10.11%	2.70	11.27%	-1.04%
480	Clay Northam Wealth Management	Long Beach, Calif.	253.91	21.00%	0.68	16.16%	4.17%
ASSET CATEGORY: \$150 MILLION TO <\$250 MILLION							
481	Empyryon Wealth Management	Roseville, Calif.	246.00	10.75%	2.83	5.66%	4.82%
482	Foresight Capital Management Advisors	Saline, Mich.	237.24	12.78%	0.52	0.22%	12.53%
483	Summit Place Financial Advisors	Summit, N.J.	231.95	29.06%	8.00	15.71%	11.54%
484	Centerline Wealth Advisors	Louisville, Ky.	231.14	15.33%	0.83	5.34%	9.49%
485	Sharper & Granite	El Segundo, Calif.	229.77	12.60%	2.30	6.97%	5.26%
486	Integrated Capital Management	Bloomfield Hills, Mich.	226.87	19.17%	0.63	13.21%	5.26%
487	Elite Retirement Planning	Grimes, Iowa	223.75	20.10%	0.37	6.51%	12.76%
488	Private Capital Management	Larkspur, Calif.	218.34	45.82%	4.55	33.67%	9.09%
489	Charleston Financial Advisors	Charleston, S.C.	216.57	15.16%	1.03	6.93%	7.69%
490	Canter Wealth	San Diego, Calif.	211.45	39.58%	1.02	9.23%	27.78%
491	Pan Global Advisers††	Costa Mesa, Calif.	209.82	20.41%	0.80	0.19%	20.18%
492	Professional Financial Strategies	Pittsford, N.Y.	203.58	12.71%	1.94	14.86%	-1.87%
493	FSA Advisors	Warren, Mich.	197.74	44.14%	0.21	40.13%	2.87%
494	Longview Financial Advisors	Huntsville, Ala.	192.21	3.99%	0.99	0.25%	3.72%
495	BCK Partners	Corning, N.Y.	191.52	23.59%	0.93	15.19%	7.29%
496	Investor's Capital Management	Menlo Park, Calif.	190.97	8.37%	2.77	14.65%	-5.48%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
 For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
497	Center For Asset Management	Palm Beach Gardens, Fla.	189.32	24.79%	0.86	8.26%	15.26%
498	RHS Financial	San Francisco, Calif.	185.33	25.38%	1.16	3.44%	21.21%
499	Granite Financial Group	Brookfield, Wis.	185.00	22.52%	0.41	21.71%	0.67%
500	Purtill Financial	Highland Heights, Ohio	182.50	15.46%	1.01	10.33%	4.65%
501	Kotys Wealth Professionals	Valparaiso, Ind.	181.49	33.24%	0.68	26.28%	5.51%
502	Westview Investment Advisors	Charlotte, Vt.	180.75	32.73%	1.25	24.49%	6.62%
503	TABR Capital Management	Orange, Calif.	179.96	8.58%	0.79	10.48%	-1.72%
504	Kahler Financial Group	Rapid City, S.D.	178.85	12.70%	1.70	11.62%	0.96%
505	Atwater Wealth Management	Boston, Mass.	176.21	19.14%	2.00	17.79%	1.15%
506	Gold Medal Waters	Boulder, Colo.	168.49	17.35%	1.22	16.50%	0.73%
507	Valpey Financial Planning	Concord, N.H.	164.20	21.85%	1.01	12.13%	8.67%
508	Smith Bruer Advisors	Tallahassee, Fla.	158.60	14.13%	0.66	10.83%	2.98%
509	Equita Financial Network	Fort Washington, Pa.	155.93	44.91%	0.59	11.13%	30.39%
ASSET CATEGORY: \$50 MILLION TO <\$150 MILLION							
510	Paragon Wealth Management	Provo, Utah	149.41	17.38%	1.01	11.83%	4.96%
511	Flagship Capital Management	Media, Pa.	148.00	17.46%	1.30	13.34%	3.64%
512	Elderado Financial	Montrose, Colo.	147.95	28.77%	0.46	22.83%	4.84%
513	Macke Financial Advisory Group	Fort Myers, Fla.	140.00	2.94%	1.40	2.94%	0.00%
514	Define Financial	San Diego, Calif.	139.72	48.51%	1.84	23.11%	20.63%
515	Ivy League Financial Advisors	Rockville, Md.	134.47	7.53%	1.40	6.41%	1.05%
516	Focus Financial Advisors	Rockford, Ill.	130.06	12.63%	0.87	5.12%	7.14%
517	Waverley Wealth Management	Mountain View, Calif.	119.68	29.99%	1.21	20.80%	7.61%
518	Steward Advisors	Chicago, Ill.	118.73	27.81%	1.20	13.61%	12.50%
519	Timmons Wealth Management	Attleboro, Mass.	100.08	30.43%	0.81	12.55%	15.89%
520	First and Main Financial	Piedmont, Calif.	94.70	29.90%	0.76	20.48%	7.83%
521	Townsend Financial Planning	Mount Sterling, Ky.	93.13	27.10%	0.80	21.67%	4.46%
522	Chilmark Financial Advisors	Miami, Fla.	89.42	14.57%	1.54	10.62%	3.57%
523	Meritas Advisors	San Rafael, Calif.	77.85	28.03%	1.34	19.20%	7.41%
524	Graf Financial	Baton Rouge, La.	76.22	24.43%	1.07	22.68%	1.43%
525	MTR Financial Services	Kingwood, Texas	73.72	24.51%	0.70	-22.92%	61.54%
526	Shriver Investments	Parker, Colo.	51.57	27.40%	0.74	31.04%	-2.78%
527	Ankerstar Wealth	Round Rock, Texas	44.81	43.00%	0.33	9.92%	30.10%
528	Safe Harbor Asset Management	Huntington, N.Y.	43.30	35.75%	0.59	10.07%	23.33%
529	DAIM Digital Asset Investment Management	Newport Beach, Calif.	32.90	172.92%	0.15	-23.48%	256.67%
530	Birch Investment Management	Brookings, S.D.	17.36	29.30%	0.30	27.07%	1.75%
531	Venn Wealth & Benefit Services	Altoona, Pa.	16.46	13.33%	0.27	49.89%	-24.39%
532	Aurora Strategic Advisors	Lumberton, N.C.	16.20	25.58%	0.07	14.07%	10.09%
533	Lindy S. Diamond, Personal Financial Services	San Marcos, Calif.	10.11	17.69%	0.92	6.99%	10.00%
534	Atherean Wealth Management	Jersey City, N.J.	8.07	31.91%	0.30	41.68%	-6.90%

*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. **Average assets per client relationship. †Firm started in 2021. ††AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ‡‡Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. ‡‡‡C2P Capital Advisor Group dba Prosperity Capital Advisors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
 For reprints of this PDF please contact **Aaron Deyang** at **FAMag@wrightsmedia.com**.