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

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# RIA Survey & Ranking 2023

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# FA's TOP 50 FASTEST-GROWING FIRMS

Firms with more than \$500 million in AUM

GROWTH RANK	FIRM NAME	LOCATION	2022 CLIENTS	YEAR END 2022 ASSETS (\$MM)*	% GROWTH IN ASSETS 2021-2022	% GROWTH IN ASSETS PER CLIENT
1	Palisade Asset Management	Minneapolis, Minn.	263	1,012.21	402.21%	388.85%
2	Catalyst Financial Partners	Boston, Mass.	139	547.29	195.33%	-12.89%
3	Wedmont Private Capital	West Chester, Pa.	215	984.07	96.29%	18.69%
4	Circle Wealth Management	Summit, N.J.	61	6,551.18	91.52%	85.24%
5	Connectus Wealth Advisers	Hunt Valley, Md.	5,200	6,773.79	74.52%	45.59%
6	Kowal Investment Group	Waukesha, Wis.	1,399	1,839.00	67.18%	51.41%
7	Cerity Partners	New York, N.Y.	11,327	40,433.57	51.38%	6.92%
8	Fermata Advisors	Sonoma, Calif.	800	733.00	47.78%	-26.11%
9	Perigon Wealth Management	San Francisco, Calif.	1,490	4,830.37	45.11%	1.96%
10	High Net Worth Advisory Group	Naples, Fla.	375	579.04	43.56%	-4.30%
11	Miracle Mile Advisors	Los Angeles, Calif.	1,500	4,130.63	39.79%	-2.14%
12	SignatureFD	Atlanta, Ga.	1,685	6,146.77	34.27%	23.91%
13	Shorepoint Capital Partners	Norwood, Mass.	382	618.34	31.29%	-5.83%
14	Dakota Wealth	Palm Beach Gardens, Fla.	1,746	2,548.15	30.61%	-14.87%
15	Souders Financial Advisors	Cincinnati, Ohio	900	697.06	27.82%	27.82%
16	Choreo	Minneapolis, Minn.	6,276	12,190.11	26.60%	-22.38%
17	Duncan Williams Asset Management	Memphis, Tenn.	586	632.03	26.10%	10.39%
18	Meritas Wealth Management	Larkspur, Calif.	245	560.57	23.32%	21.81%
19	Waverly Advisors	Birmingham, Ala.	2,650	5,510.88	23.32%	-34.15%
20	Sather Financial Group	Victoria, Texas	471	1,764.38	23.30%	19.90%
21	Red Door Wealth Management	Memphis, Tenn.	620	1,443.69	21.53%	15.84%
22	Mariner Wealth Advisors	Overland Park, Kan.	36,367	65,874.57	18.84%	-1.64%
23	CAPTRUST	Raleigh, N.C.	27,205	777,297.74	18.66%	-2.55%
24	Lido Advisors	Los Angeles, Calif.	4,703	13,102.07	18.55%	-8.19%
25	Bogart Wealth	McLean, Va.	1,226	2,282.22	18.55%	-0.98%
26	Financial Insights Wealth Management	Tacoma, Wash.	892	621.06	16.38%	-2.01%
27	AlphaCore Wealth Advisory	La Jolla, Calif.	995	1,497.53	16.01%	0.27%
28	Mayflower Advisors	Boston, Mass.	796	1,243.57	15.71%	28.65%
29	Glassman Wealth Services	Vienna, Va.	355	1,907.22	14.73%	-2.40%
30	Homrich Berg	Atlanta, Ga.	3,695	12,528.31	13.04%	-12.41%
31	Wealthcare Capital Management	Richmond, Va.	4,212	2,603.04	12.47%	20.83%
32	Meyer Capital Group	Marlton, N.J.	800	1,484.00	11.89%	3.49%
33	Element Pointe Family Office	Miami, Fla.	38	636.74	11.40%	23.13%
34	Simon Quick Advisors	Morristown, N.J.	706	5,103.98	11.39%	-27.11%
35	Yale Capital Corp.	Saint Petersburg, Fla.	120	2,722.85	11.10%	8.32%
36	Glass Jacobson Wealth Advisors	Owings Mills, Md.	735	770.08	10.97%	-17.27%
37	Altium Wealth Management	Purchase, N.Y.	1,010	2,942.45	10.95%	2.60%
38	TrinityPoint Wealth	Milford, Conn.	1,007	1,149.03	10.84%	-15.13%
39	Marcum Wealth	Cleveland, Ohio	2,613	2,250.83	10.43%	2.65%
40	Pathstone	Englewood, N.J.	1,548	24,835.86	9.87%	-28.39%
41	Clarfeld Financial Advisors	Tarrytown, N.Y.	1,240	7,105.62	9.81%	-2.59%
42	MAI Capital Management	Cleveland, Ohio	7,069	15,773.43	9.64%	-25.81%
43	Schechter Investment Advisors	Birmingham, Mich.	721	2,847.05	9.56%	-9.73%
44	Chequers Financial Management	San Francisco, Calif.	175	642.94	8.88%	-12.89%
45	Connecticut Wealth Management	Farmington, Conn.	1,081	2,589.91	8.58%	-10.10%
46	Evermay Wealth Management	Arlington, Va.	418	799.52	8.51%	-8.10%
47	Fi3 Financial Advisors	Indianapolis, Ind.	183	657.21	8.42%	20.26%
48	Allworth Financial	Folsom, Calif.	19,500	14,880.81	7.97%	-14.05%
49	Capital Wealth Advisors	Naples, Fla.	1,333	2,177.94	7.88%	-8.22%
50	Wealthspire Advisors	New York, N.Y.	7,075	18,772.10	7.59%	-1.81%

\*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV.

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# FA's 2023 RIA RANKING

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
<b>ASSET CATEGORY: \$1 BILLION AND OVER</b>							
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	MAI Capital Management	Cleveland, Ohio	15,773.43	9.64%	2.23	-25.81%	47.79%
31	Oxford Financial Group	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%	25.62%
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.

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50	GW & Wade	Wellesley, Mass.	8,902.73	-14.43%	2.53	-16.52%	2.50%
51	The Mather Group	Chicago, Ill.	8,718.72	1.62%	2.16	-21.35%	29.21%
52	CV Advisors	Aventura, Fla.	8,415.39	-10.54%	76.50	-15.42%	5.77%
53	Freestone Capital Management	Seattle, Wash.	8,221.07	-7.93%	3.30	-15.03%	8.36%
54	TAG Associates	New York, N.Y.	8,071.49	-15.00%	73.38	-15.00%	0.00%
55	Anchor Capital Advisors	Boston, Mass.	8,008.06	-18.21%	7.33	-16.72%	-1.80%
56	Mill Creek Capital Advisors	Conshohocken, Pa.	7,876.36	-16.54%	20.30	-21.48%	6.30%
57	Johnson Wealth	Racine, Wis.	7,746.24	-12.02%	5.02	-48.20%	69.86%
58	Tolleson Wealth Management	Dallas, Texas	7,593.00	-90.21%	35.99	-91.18%	11.05%
59	Brookstone Capital Management	Wheaton, Ill.	7,514.38	-10.54%	0.16	-13.32%	3.21%
60	Kovitz Investment Group Partners	Chicago, Ill.	7,293.64	-6.51%	3.27	-9.40%	3.19%
61	Clarfeld Financial Advisors	Tarrytown, N.Y.	7,105.62	9.81%	5.73	-2.59%	12.73%
62	Valeo Financial Services	Carmel, Ind.	7,103.71	-2.39%	4.13	11.44%	-12.41%
63	Douglas C. Lane & Associates	New York, N.Y.	7,045.88	-16.87%	5.57	-18.57%	2.10%
64	Forum Financial Management	Lombard, Ill.	7,005.56	-5.32%	1.40	-13.66%	9.66%
65	Conrad Siegel Investment Advisors	Harrisburg, Pa.	6,987.64	-8.27%	16.06	-20.08%	14.78%
66	Bartlett Wealth Management	Cincinnati, Ohio	6,948.87	-15.04%	2.97	-24.68%	12.81%
67	Welch & Forbes	Boston, Mass.	6,810.84	-12.76%	8.44	-10.92%	-2.06%
68	Modera Wealth Management	Westwood, N.J.	6,800.79	-2.15%	3.01	-14.23%	14.08%
69	Connectus Wealth Advisers	Hunt Valley, Md.	6,773.79	74.52%	1.30	45.59%	19.87%
70	Cornerstone Advisors Asset Management	Bethlehem, Pa.	6,637.58	-12.80%	14.21	-14.67%	2.19%
71	Circle Wealth Management	Summit, N.J.	6,551.18	91.52%	107.40	85.24%	3.39%
72	Wetherby Asset Management	San Francisco, Calif.	6,531.45	-0.62%	11.22	0.57%	-1.19%
73	Coldstream Wealth Management	Bellevue, Wash.	6,498.24	-9.99%	2.48	-18.41%	10.33%
74	Ropes Wealth Advisors	Marblehead, Mass.	6,498.20	-13.39%	4.80	-16.91%	4.24%
75	Adviser Investments	Newton, Mass.	6,450.16	-11.03%	1.62	-11.17%	0.15%
76	RMB Capital	Chicago, Ill.	6,370.89	-18.81%	2.67	-16.37%	-2.93%
77	SignatureFD	Atlanta, Ga.	6,146.77	34.27%	3.65	23.91%	8.36%
78	Altair Advisors	Chicago, Ill.	6,014.19	-10.01%	16.52	-13.47%	4.00%
79	Greenspring Advisors	Towson, Md.	6,000.12	-2.06%	5.28	-46.68%	83.68%
80	Caprock	Boise, Idaho	5,919.85	3.11%	20.34	-8.23%	12.36%
81	Joel Isaacson & Co.	New York, N.Y.	5,911.34	-12.48%	4.89	-13.64%	1.34%
82	Parallel Advisors	San Francisco, Calif.	5,708.13	4.87%	1.62	-17.80%	27.58%
83	Bradley, Foster & Sargent	Hartford, Conn.	5,629.52	-7.72%	3.02	-4.35%	-3.53%
84	Heck Capital Advisors	Rhineland, Wis.	5,620.33	-15.80%	4.86	-14.85%	-1.11%
85	Advisors Capital Management	Ridgewood, N.J.	5,601.71	4.78%	1.33	-18.90%	29.19%
86	Plancorp	St. Louis, Mo.	5,545.42	-8.76%	3.63	-12.88%	4.73%
87	Waverly Advisors	Birmingham, Ala.	5,510.88	23.32%	2.08	-34.15%	87.28%
88	WMS Partners	Towson, Md.	5,155.00	-9.15%	11.11	-8.56%	-0.64%
89	Simon Quick Advisors	Morristown, N.J.	5,103.98	11.39%	7.23	-27.11%	52.81%
90	Bailard	Foster City, Calif.	5,083.39	-9.76%	5.03	-22.18%	15.96%
91	Thrivent Advisor Network	Minneapolis, Minn.	5,058.43	-22.53%	0.44	-19.49%	-3.77%
92	HBKS Wealth Advisors	Erie, Pa.	4,991.76	-6.54%	0.88	-5.76%	-0.82%
93	First Foundation Advisors	Irvine, Calif.	4,985.28	-12.24%	3.21	-5.80%	-6.84%
94	Mission Wealth Management	Santa Barbara, Calif.	4,975.56	3.33%	2.09	-11.53%	16.80%
95	Beacon Capital Management	Dayton, Ohio	4,922.30	3.76%	0.41	-11.33%	17.02%
96	Perigon Wealth Management	San Francisco, Calif.	4,830.37	45.11%	3.24	1.96%	42.31%
97	Ingalls & Snyder	New York, N.Y.	4,757.49	-12.64%	1.08	-15.67%	3.59%
98	Wilbanks, Smith & Thomas Asset Mgmt.	Norfolk, Va.	4,754.54	-4.34%	1.84	-10.17%	6.48%
99	Alesco Advisors	Pittford, N.Y.	4,700.91	-13.99%	9.38	-16.22%	2.66%

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100	GYL Financial Synergies	West Hartford, Conn.	4,646.95	-12.60%	3.03	-8.84%	-4.12%
101	Northside Capital Management	Hood River, Ore.	4,635.69	-17.72%	115.89	-28.01%	14.29%
102	Sendero Wealth Management	San Antonio, Texas	4,515.99	-7.14%	15.52	-17.03%	11.92%
103	JMG Financial Group	Downers Grove, Ill.	4,501.00	-4.56%	3.09	-13.61%	10.48%
104	Zhang Financial	Portage, Mich.	4,464.46	-6.69%	2.51	-14.81%	9.53%
105	Shuster Advisory Group	Pasadena, Calif.	4,383.11	-0.81%	14.32	-43.27%	74.86%
106	Pure Financial Advisors	San Diego, Calif.	4,361.73	4.04%	1.23	-10.76%	16.59%
107	Index Fund Advisors	Irvine, Calif.	4,353.56	-11.83%	1.78	-14.49%	3.11%
108	Klingenstein Fields Advisors	New York, N.Y.	4,314.28	-17.47%	8.16	-17.31%	-0.19%
109	Fort Pitt Capital Group	Pittsburgh, Pa.	4,302.94	-13.93%	1.33	-19.63%	7.10%
110	F.L.Putnam Investment Management Co.	Wellesley, Mass.	4,302.70	-5.38%	2.57	-19.80%	17.98%
111	Linscomb & Williams	Houston, Texas	4,256.70	-12.29%	2.31	-15.67%	4.01%
112	Iron Capital Advisors	Atlanta, Ga.	4,225.02	-22.51%	24.28	-19.84%	-3.33%
113	Truepoint Wealth Counsel	Cincinnati, Ohio	4,210.57	-9.31%	2.41	-16.78%	8.97%
114	Palisade Capital Management	Fort Lee, N.J.	4,206.86	-23.73%	13.88	-32.79%	13.48%
115	Badgley Phelps Wealth Managers	Seattle, Wash.	4,206.19	-11.81%	4.60	-17.98%	7.53%
116	Annex Wealth Management	Elm Grove, Wis.	4,204.03	-8.54%	0.76	-13.53%	5.77%
117	Permanens Capital Partners	Charleston, S.C.	4,193.71	-6.18%	89.23	-12.17%	6.82%
118	Empirical Wealth Management	Seattle, Wash.	4,178.93	0.29%	2.35	-13.49%	15.93%
119	Grimes & Company	Westborough, Mass.	4,177.58	-5.58%	1.17	-13.29%	8.89%
120	Finaccess Advisors	Miami, Fla.	4,139.67	-6.89%	39.43	-0.69%	-6.25%
121	Miracle Mile Advisors	Los Angeles, Calif.	4,130.63	39.79%	2.75	-2.14%	42.86%
122	Crestwood Advisors Group	Boston, Mass.	4,057.19	-18.26%	4.64	-17.14%	-1.35%
123	Cassaday & Company	McLean, Va.	4,033.82	-13.20%	1.40	-18.43%	6.41%
124	Gradient Investments	Arden Hills, Minn.	4,017.97	-8.18%	0.19	-18.20%	12.25%
125	Bordeaux Wealth Advisors	Menlo Park, Calif.	4,006.68	-2.46%	20.98	12.86%	-13.57%
126	Crescent Grove Advisors	Lake Forest, Ill.	3,912.91	-10.15%	11.18	-15.28%	6.06%
127	Chicago Partners Wealth Advisors	Chicago, Ill.	3,900.92	4.68%	2.10	-19.13%	29.45%
128	Allegheny Financial Group	Pittsburgh, Pa.	3,789.86	-14.20%	1.16	-19.93%	7.15%
129	Exencial Wealth Advisors	Oklahoma City, Okla.	3,769.64	-13.55%	1.39	-16.65%	3.72%
130	Hamilton Capital	Columbus, Ohio	3,757.88	3.39%	1.41	-3.10%	6.71%
131	Brownson, Rehms & Foxworth	Chicago, Ill.	3,722.14	-13.42%	14.60	-23.26%	12.83%
132	Robertson Stephens Wealth Management	San Francisco, Calif.	3,694.03	-6.03%	3.55	-42.98%	64.82%
133	Kovack Advisors	Fort Lauderdale, Fla.	3,650.70	-19.72%	0.33	-29.19%	13.38%
134	Crestone Capital	Boulder, Colo.	3,646.52	-12.65%	17.04	-16.32%	4.39%
135	Certuity (formerly Camden Capital)	North Palm Beach, Fla.	3,641.79	-19.14%	8.00	-20.21%	1.34%
136	Clifford Swan Investment Counselors	Pasadena, Calif.	3,630.00	-13.30%	3.86	-13.95%	0.75%
137	Kingsview Wealth Management	Grants Pass, Ore.	3,584.12	2.78%	0.58	-19.98%	28.44%
138	Advance Capital Management	Southfield, Mich.	3,569.93	-12.28%	0.53	-14.45%	2.54%
139	Westmount Asset Management	Los Angeles, Calif.	3,565.63	-7.08%	2.61	-8.51%	1.56%
140	Callan Family Office††	Radnor, Pa.	3,540.97	NA	32.19	NA	NA
141	Mainstay Capital Management	Grand Blanc, Mich.	3,437.34	-10.92%	0.91	-9.17%	-1.93%
142	TCI Wealth Advisors	Tucson, Ariz.	3,431.53	-8.84%	1.25	-14.48%	6.59%
143	Axxcess Wealth Management	Carlsbad, Calif.	3,399.62	-5.26%	0.69	-12.02%	7.68%
144	Wescott Financial Advisory Group	Philadelphia, Pa.	3,386.14	-3.25%	6.51	-23.72%	26.83%
145	TFO Phoenix	Phoenix, Ariz.	3,340.45	-6.59%	14.15	-23.61%	22.28%
146	Retirement Planners of America	Plano, Texas	3,339.63	-30.49%	0.50	-13.48%	-19.67%
147	Merriman Wealth Management	Seattle, Wash.	3,297.16	-9.51%	1.39	-11.46%	2.20%
148	TFO-TDC dba TDC Investment Advisory	Maumee, Ohio	3,223.54	-9.22%	2.06	-13.69%	5.17%
149	Family Management Corporation	New York, N.Y.	3,155.27	0.20%	5.06	16.42%	-13.93%

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# FA's 2023 RIA RANKING

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
150	Heritage Investors Management Corporation	Bethesda, Md.	3,126.80	-13.53%	4.35	-13.77%	0.28%
151	Foster Group	West Des Moines, Iowa	3,083.30	-9.14%	1.69	-15.01%	6.90%
152	Constellation Wealth Advisors	Cincinnati, Ohio	3,047.34	0.97%	12.70	19.90%	-15.79%
153	Sand Hill Global Advisors	Palo Alto, Calif.	3,037.94	-15.72%	6.16	-25.98%	13.86%
154	True North Advisors	Dallas, Texas	3,006.40	4.69%	6.19	8.14%	-3.19%
155	Carlson Capital Management	Northfield, Minn.	2,993.36	-5.41%	2.38	-8.11%	2.94%
156	CM Wealth Advisors	Beachwood, Ohio	2,984.53	-15.55%	15.15	-23.26%	10.06%
157	JFS Wealth Advisors	Hermitage, Pa.	2,983.68	-15.59%	1.41	-16.54%	1.15%
158	Telemus Capital	Southfield, Mich.	2,972.20	-11.59%	1.80	-14.80%	3.77%
159	Accredited Investors Wealth Management	Edina, Minn.	2,956.36	-12.62%	4.99	-14.09%	1.72%
160	Altium Wealth Management	Purchase, N.Y.	2,942.45	10.95%	2.91	2.60%	8.14%
161	Sowell Management	North Little Rock, Ark.	2,892.76	3.57%	0.19	36.81%	-24.30%
162	Lake Street Advisors	Portsmouth, N.H.	2,888.38	-14.93%	32.82	-15.90%	1.15%
163	CreativeOne Wealth	Overland Park, Kan.	2,879.55	-11.16%	0.21	-21.46%	13.11%
164	AGW Capital Advisors	Tampa, Fla.	2,858.78	-6.15%	22.87	-15.16%	10.62%
165	Schechter Investment Advisors	Birmingham, Mich.	2,847.05	9.56%	3.95	-9.73%	21.38%
166	Abacus Wealth Partners	Santa Monica, Calif.	2,834.45	-17.38%	1.85	0.70%	-17.95%
167	GenTrust	Miami, Fla.	2,802.47	2.12%	9.07	-8.13%	11.15%
168	Bragg Financial Advisors	Charlotte, N.C.	2,798.67	-8.87%	7.00	NA	NA
169	The Wealth Consulting Group	Las Vegas, Nev.	2,795.80	-2.66%	0.38	-8.40%	6.27%
170	Klingman & Associates	New York, N.Y.	2,777.26	-10.99%	4.74	-16.46%	6.55%
171	HoyleCohen	San Diego, Calif.	2,739.82	-15.35%	1.89	-17.81%	2.99%
172	Halbert Hargrove	Long Beach, Calif.	2,735.03	-9.76%	3.40	-17.28%	9.09%
173	Beaumont Financial Partners	Needham, Mass.	2,726.50	-9.93%	4.74	-13.84%	4.55%
174	Yale Capital Corp.	Saint Petersburg, Fla.	2,722.85	11.10%	22.69	8.32%	2.56%
175	Smith Salley Wealth Management	Greensboro, N.C.	2,709.59	-0.28%	3.46	-7.78%	8.14%
176	Sage Financial Group	Conshohocken, Pa.	2,702.00	-8.10%	3.60	-13.00%	5.63%
177	Evensky Katz	Coral Gables, Fla.	2,640.71	-3.68%	2.46	-6.72%	3.27%
178	Henssler Financial	Kennesaw, Ga.	2,639.37	-4.91%	1.69	-13.58%	10.03%
179	Coastal Bridge Advisors	Westport, Conn.	2,620.18	-8.22%	8.14	-6.51%	-1.83%
180	Wealthcare Capital Management	Richmond, Va.	2,603.04	12.47%	0.62	20.83%	-6.92%
181	Connecticut Wealth Management	Farmington, Conn.	2,589.91	8.58%	2.40	-10.10%	20.78%
182	Dakota Wealth	Palm Beach Gardens, Fla.	2,548.15	30.61%	1.46	-14.87%	53.43%
183	IFG Advisory	Atlanta, Ga.	2,532.64	-5.91%	0.36	-28.60%	31.78%
184	The Welch Group	Birmingham, Ala.	2,522.23	2.95%	2.07	-1.94%	4.99%
185	GM Advisory Group	Melville, N.Y.	2,514.70	-19.95%	4.31	-23.38%	4.47%
186	Wellesley Asset Management	Wellesley, Mass.	2,394.52	-23.23%	1.32	-22.29%	-1.20%
187	Morton Wealth	Calabasas, Calif.	2,377.71	-1.60%	2.16	-4.81%	3.37%
188	MCF Advisors	Covington, Ky.	2,326.11	-13.71%	2.68	-18.19%	5.47%
189	XML Financial Group	Bethesda, Md.	2,323.03	2.89%	0.40	-64.13%	186.84%
190	Resource Consulting Group	Orlando, Fla.	2,316.72	-12.34%	4.31	-15.11%	3.27%
191	Bogart Wealth	McLean, Va.	2,282.22	18.55%	1.86	-0.98%	19.73%
192	Chicago Capital	Chicago, Ill.	2,257.87	-28.42%	3.83	-30.49%	2.97%
193	Marcum Wealth	Cleveland, Ohio	2,250.83	10.43%	0.86	2.65%	7.58%
194	Cardiff Park Advisors	Carlsbad, Calif.	2,206.30	-8.81%	5.84	-8.32%	-0.53%
195	Vigilant Wealth Management	Portland, Maine	2,200.86	-1.75%	4.37	-10.14%	9.33%
196	BakerAvenue Wealth Management	San Francisco, Calif.	2,200.00	4.76%	2.99	3.91%	0.82%
197	Capital Wealth Advisors	Naples, Fla.	2,177.94	7.88%	1.63	-8.22%	17.55%
198	Schneider Downs Wealth Mgmt. Advisors	Pittsburgh, Pa.	2,175.01	-12.01%	2.93	-16.99%	6.00%
199	Team Hewins	Redwood City, Calif.	2,173.72	-11.24%	6.16	-18.28%	8.62%

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200	FAS Wealth Partners	Leawood, Kan.	2,155.59	-10.60%	1.64	-17.29%	8.08%
201	Retirement Income Solutions	Ann Arbor, Mich.	2,145.73	-10.74%	1.70	-12.08%	1.53%
202	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	2,111.00	0.63%	1.82	-10.21%	12.08%
203	Gratus Capital	Atlanta, Ga.	2,103.07	-39.90%	2.11	-46.84%	13.05%
204	Birch Hill Investment Advisors	Boston, Mass.	2,064.58	-17.78%	11.10	-18.22%	0.54%
205	Arnerich Massena	Portland, Ore.	2,064.37	-24.92%	7.02	-16.49%	-10.09%
206	Chesley, Taft & Associates	Chicago, Ill.	2,059.31	-17.39%	5.57	-19.40%	2.49%
207	Regal Investment Advisors	Kentwood, Mich.	2,042.75	-0.74%	0.30	-13.94%	15.34%
208	Inspire Investing	Meridian, Idaho	2,031.61	2.36%	4.23	48.84%	-31.23%
209	SJS Investment Services	Sylvania, Ohio	2,028.89	-24.18%	2.26	-26.54%	3.22%
210	Osborne Partners Capital Management	San Francisco, Calif.	1,998.29	-10.92%	3.04	-11.60%	0.77%
211	Summitry	Foster City, Calif.	1,988.68	-16.52%	1.76	-12.31%	-4.81%
212	CPS Investment Advisors	Lakeland, Fla.	1,988.22	-8.50%	0.57	78.67%	-48.79%
213	GHP Investment Advisors	Denver, Colo.	1,984.69	-8.48%	1.91	-13.40%	5.69%
214	Foster & Motley	Cincinnati, Ohio	1,961.37	-4.68%	2.47	-9.36%	5.17%
215	Zemenick & Walker	Saint Louis, Mo.	1,959.09	-23.41%	8.48	-21.42%	-2.53%
216	CoreCap Advisors	Southfield, Mich.	1,957.27	2.53%	0.25	-17.87%	24.84%
217	LWV Advisors	Pittsford, N.Y.	1,933.79	-12.14%	4.14	-19.29%	8.86%
218	Heritage Financial Services	Westwood, Mass.	1,930.82	-13.35%	1.70	-19.37%	7.46%
219	RTD Financial Advisors	Philadelphia, Pa.	1,924.54	-12.18%	2.98	-9.46%	-3.01%
220	Certified Advisory Corp.	Altamonte Springs, Fla.	1,921.93	-11.79%	0.84	-16.14%	5.19%
221	Glassman Wealth Services	Vienna, Va.	1,907.22	14.73%	5.37	-2.40%	17.55%
222	Performance Wealth	Hinsdale, Ill.	1,901.03	-22.37%	6.79	-27.09%	6.46%
223	West Financial Services	McLean, Va.	1,898.69	-16.84%	2.08	-19.40%	3.17%
224	Courier Capital	Buffalo, N.Y.	1,898.01	-12.95%	2.25	-15.95%	3.57%
225	Obermeyer Wood Investment Counsel	Aspen, Colo.	1,886.99	-23.01%	3.02	-27.94%	6.84%
226	SFMG Wealth Advisors	Plano, Texas	1,884.95	-3.40%	2.88	-6.20%	2.99%
227	BLB&B Advisors	Montgomeryville, Pa.	1,878.94	-9.01%	1.47	-13.42%	5.09%
228	Kowal Investment Group	Waukesha, Wis.	1,839.00	67.18%	1.31	51.41%	10.42%
229	Capstone Financial Advisors	Downers Grove, Ill.	1,824.85	-13.06%	2.91	-21.64%	10.95%
230	Guyasuta Investment Advisors	Pittsburgh, Pa.	1,814.72	-8.62%	4.22	-13.29%	5.39%
231	CFS Investment Advisory Services	Totowa, N.J.	1,794.47	-13.87%	3.20	-15.41%	1.82%
232	Legacy Wealth Management	Memphis, Tenn.	1,778.42	-14.35%	1.36	-19.32%	6.16%
233	IPI Wealth Management	Decatur, Ill.	1,776.79	-5.68%	0.45	-20.41%	18.50%
234	Sather Financial Group	Victoria, Texas	1,764.38	23.30%	3.75	19.90%	2.84%
235	Stonebridge Capital Advisors	Saint Paul, Minn.	1,760.36	-2.47%	1.40	8.22%	-9.88%
236	Stokes Family Office	New Orleans, La.	1,732.06	-5.94%	2.78	-18.19%	14.97%
237	Lutz Financial	Omaha, Neb.	1,731.48	-4.79%	2.32	-9.25%	4.92%
238	Prosperity Capital Advisors	Westlake, Ohio	1,712.43	-3.30%	0.44	-12.71%	10.78%
239	Fairway Wealth Management	Independence, Ohio	1,652.49	-18.33%	6.21	-17.72%	-0.75%
240	LBMC Investment Advisors	Brentwood, Tenn.	1,623.66	-14.40%	3.33	-17.39%	3.62%
241	ProVise Management Group	Clearwater, Fla.	1,616.43	-8.64%	1.14	-10.96%	2.61%
242	Pinnacle Wealth Planning Services	Mansfield, Ohio	1,609.40	-19.20%	1.71	-24.70%	7.30%
243	Fairview Capital Investment Management	Greenbrae, Calif.	1,540.98	-6.40%	6.79	-12.17%	6.57%
244	ML&R Wealth Management	Austin, Texas	1,538.10	2.39%	2.18	-11.82%	16.12%
245	Conservest Capital Advisors	Wynnewood, Pa.	1,536.66	-4.76%	5.73	-8.66%	4.28%
246	Tom Johnson Investment Management	Oklahoma City, Okla.	1,519.43	-7.52%	7.91	-5.59%	-2.04%
247	Cornerstone Advisory	Hunt Valley, Md.	1,515.98	-10.94%	1.91	-4.87%	-6.38%
248	Van Hulzen Asset Management	El Dorado Hills, Calif.	1,513.03	-8.73%	1.45	-21.31%	15.98%
249	Abacus Planning Group	Columbia, S.C.	1,507.41	-9.76%	5.02	-14.28%	5.26%

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250	AlphaCore Wealth Advisory	La Jolla, Calif.	1,497.53	16.01%	1.51	0.27%	15.70%
251	Wealthquest	Cincinnati, Ohio	1,493.99	-10.75%	1.03	-14.02%	3.80%
252	California Financial Advisors	San Ramon, Calif.	1,489.95	-9.65%	1.13	-10.06%	0.46%
253	Meyer Capital Group	Marlton, N.J.	1,484.00	11.89%	1.86	3.49%	8.11%
254	Cabana Asset Management	Fayetteville, Ark.	1,476.78	-40.64%	3.90	-42.05%	2.43%
255	Red Door Wealth Management	Memphis, Tenn.	1,443.69	21.53%	2.33	15.84%	4.91%
256	Baltimore Washington Financial Advisors	Columbia, Md.	1,442.58	-7.59%	0.57	NA	NA
257	RKL Wealth Management	Lancaster, Pa.	1,431.85	0.11%	1.30	-20.85%	26.47%
258	Condor Capital Wealth Management	Martinsville, N.J.	1,429.53	-14.70%	1.97	-8.35%	-6.92%
259	Patriot Investment Management Group	Knoxville, Tenn.	1,414.83	-12.16%	0.75	-11.74%	-0.47%
260	Ensemble Capital Management	San Francisco, Calif.	1,410.95	-22.56%	4.52	-29.01%	9.09%
261	RZH Advisors	Stamford, Conn.	1,401.65	-7.54%	3.55	-12.93%	6.18%
262	Berger Financial Group	Plymouth, Minn.	1,400.00	-6.67%	0.47	-12.89%	7.14%
263	Beaird Harris Wealth Management	Dallas, Texas	1,398.92	-8.13%	1.97	-8.13%	0.00%
264	Altfest Personal Wealth Management	New York, N.Y.	1,390.09	-10.62%	2.06	-13.93%	3.85%
265	Elsner Financial Planning	Indianapolis, Ind.	1,379.85	-12.62%	4.02	-24.59%	15.88%
266	HCR Wealth Advisors	Los Angeles, Calif.	1,374.50	-5.29%	1.53	-1.40%	-3.95%
267	Rebalance	Bethesda, Md.	1,360.00	1.19%	2.00	-2.83%	4.13%
268	SilverOak Wealth Management	Edina, Minn.	1,354.80	2.73%	3.59	-2.45%	5.31%
269	Tschetter Group	Bellevue, Wash.	1,336.06	-11.37%	4.61	-20.23%	11.11%
270	3EDGE Asset Management	Naples, Fla.	1,332.68	-2.38%	1.69	-20.96%	23.51%
271	HUB Investment Advisors	Omaha, Neb.	1,315.10	0.27%	4.85	-26.00%	35.50%
272	Nottingham Advisors	Amherst, N.Y.	1,301.01	-7.03%	0.82	-1.85%	-5.28%
273	Narwhal Capital Management	Marietta, Ga.	1,296.30	-5.24%	4.63	-22.84%	22.81%
274	Diversified	Wilmington, Del.	1,289.65	4.43%	0.92	-17.53%	26.62%
275	SAX Wealth Advisors	Parsippany, N.J.	1,287.69	-5.38%	1.56	-11.22%	6.58%
276	Austin Asset	Austin, Texas	1,265.58	-7.35%	2.94	-9.50%	2.38%
277	Magnus Financial Group	New York, N.Y.	1,260.52	6.82%	1.43	-14.06%	24.29%
278	Diversified Portfolios	Bloomfield Hills, Mich.	1,253.46	-14.52%	2.28	-18.56%	4.96%
279	Atwood & Palmer	Kansas City, Mo.	1,251.94	-3.72%	6.26	-9.50%	6.38%
280	Smith Anglin Financial	Dallas, Texas	1,245.09	-4.81%	1.11	0.73%	-5.50%
281	Mayflower Advisors	Boston, Mass.	1,243.57	15.71%	1.56	28.65%	-10.06%
282	Bitterroot Capital Advisors	Bozeman, Mont.	1,228.72	1.82%	68.26	-3.83%	5.88%
283	TFC Financial Management	Boston, Mass.	1,226.53	-12.02%	3.22	-10.17%	-2.06%
284	Azzad Asset Management	Falls Church, Va.	1,225.89	-4.00%	0.80	-17.06%	15.76%
285	Per Stirling Capital Management	Westlake Hills, Texas	1,184.82	-13.71%	1.05	-16.76%	3.67%
286	Investment Counsel Company	Las Vegas, Nev.	1,180.74	-11.71%	3.80	-16.25%	5.42%
287	Segment Wealth Management	Houston, Texas	1,171.64	-3.20%	5.61	-11.54%	9.42%
288	Bloom Advisors	Farmington Hills, Mich.	1,155.07	-20.26%	0.96	-19.47%	-0.99%
289	R W Investment Management	Eagle, Idaho	1,154.85	-14.84%	1.47	-8.54%	-6.89%
290	BigSur Wealth Management	Miami, Fla.	1,154.40	0.09%	54.97	-9.44%	10.53%
291	Traphagen Investment Advisors	Oradell, N.J.	1,151.99	-0.79%	0.67	-11.46%	12.05%
292	TrinityPoint Wealth	Milford, Conn.	1,149.03	10.84%	1.14	-15.13%	30.61%
293	Valley National Adviser	Bethlehem, Pa.	1,129.29	-9.99%	0.50	-10.36%	0.40%
294	Madison Wealth Management	Cincinnati, Ohio	1,123.86	-13.13%	1.95	-19.02%	7.26%
295	The Weil Company dba Christopher Weil & Co.	San Diego, Calif.	1,107.18	4.23%	2.04	-0.58%	4.84%
296	Telos Capital Management	San Diego, Calif.	1,101.82	-7.98%	1.42	-9.76%	1.97%
297	Financial Synergies Wealth Advisors	Houston, Texas	1,091.13	-1.93%	1.40	-7.20%	5.68%
298	Wealthstream Advisors	New York City, N.Y.	1,075.08	-7.08%	2.65	-10.98%	4.38%
299	Titleist Asset Management	San Antonio, Texas	1,072.64	1.27%	0.81	-4.30%	5.82%

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300	Blue Chip Partners	Farmington Hills, Mich.	1,052.01	-4.26%	1.57	5.30%	-9.08%
301	Sheaff Brock Investment Advisors	Indianapolis, Ind.	1,049.68	-25.61%	1.16	-24.87%	-0.98%
302	Nilsine Partners	Greenwood Village, Colo.	1,048.57	3.89%	2.39	-15.08%	22.35%
303	PDS Planning	Dublin, Ohio	1,045.59	-7.57%	1.76	-8.34%	0.85%
304	Weatherly Asset Management	Del Mar, Calif.	1,013.76	-16.83%	2.78	-15.23%	-1.88%
305	Palisade Asset Management	Minneapolis, Minn.	1,012.21	402.21%	3.85	388.85%	2.73%
306	Paragon Capital Management	Denver, Colo.	1,002.80	-29.53%	6.43	-29.08%	-0.64%
307	StraightLine Group	Troy, Mich.	1,002.56	-14.98%	0.38	-14.85%	-0.15%
308	SPC Financial	Rockville, Md.	1,000.15	-12.66%	0.75	-20.00%	9.17%
<b>ASSET CATEGORY: \$500 MILLION TO &lt; \$1 BILLION</b>							
309	Delta Financial Group	Basking Ridge, N.J.	996.31	-7.43%	1.34	-12.27%	5.52%
310	Destiny Wealth Partners	Tavares, Fla.	986.97	-4.29%	1.04	-9.81%	6.13%
311	Wedmont Private Capital	West Chester, Pa.	984.07	96.29%	4.58	18.69%	65.38%
312	BFSG	Irvine, Calif.	976.97	-11.56%	1.24	-16.49%	5.91%
313	Agili	Richmond, Va.	972.54	-8.81%	2.79	-15.87%	8.39%
314	CJM Wealth Advisers	Falls Church, Va.	970.25	-12.21%	1.14	-16.23%	4.80%
315	Virtue Capital Management	Brentwood, Tenn.	941.39	-12.14%	0.12	-25.68%	18.21%
316	Janiczek Wealth Management	Denver, Colo.	940.87	-4.50%	5.53	-10.12%	6.25%
317	Cadinha & Co.	Honolulu, Hawaii	939.35	-10.78%	1.36	-11.43%	0.73%
318	Regatta Capital Group	El Segundo, Calif.	931.43	2.71%	0.93	-4.90%	8.00%
319	Retirement Investment Advisors	Oklahoma City, Okla.	929.85	-17.82%	0.70	-22.85%	6.52%
320	Petersen Hastings Investment Management	Kennewick, Wash.	927.09	-8.36%	0.99	-14.26%	6.87%
321	Delegate Advisors	Chapel Hill, N.C.	902.44	-4.68%	20.99	-13.54%	10.26%
322	Moisand Fitzgerald Tamayo	Orlando, Fla.	901.42	-2.23%	1.13	-10.57%	9.33%
323	NEIRG Wealth Management	North Andover, Mass.	899.33	-12.48%	1.10	-10.24%	-2.50%
324	REDW Wealth	Albuquerque, N.M.	896.40	-6.15%	2.33	5.83%	-11.32%
325	Willis Johnson & Associates	Houston, Texas	894.23	-2.26%	2.17	-11.75%	10.75%
326	Total Wealth Planning	Blue Ash, Ohio	865.82	6.14%	1.55	-14.02%	23.45%
327	MJP Wealth Advisors	Farmington, Conn.	864.38	-10.64%	1.12	-19.63%	11.19%
328	Apriem Advisors	Irvine, Calif.	862.06	-14.47%	1.15	-18.35%	4.75%
329	DiNuzzo Private Wealth	Beaver, Pa.	842.11	-9.40%	1.03	-8.85%	-0.61%
330	Signet Financial Management	Parsippany, N.J.	839.65	-12.49%	1.16	-15.99%	4.17%
331	Halpern Financial	Ashburn, Va.	828.83	-90.40%	2.72	-90.74%	3.74%
332	Austin Private Wealth	Austin, Texas	823.11	-3.58%	0.72	-15.25%	13.78%
333	Spectrum Wealth Management	Indianapolis, Ind.	810.00	-17.10%	3.51	-17.10%	0.00%
334	Evermay Wealth Management	Arlington, Va.	799.52	8.51%	1.91	-8.10%	18.08%
335	Lake Street	Chicago, Ill.	796.37	-9.58%	1.47	-12.09%	2.85%
336	Financial Advisory Corporation	Grand Rapids, Mich.	795.72	-6.86%	3.39	-13.20%	7.31%
337	Seasons of Advice Wealth Management	New York, N.Y.	789.28	-16.40%	1.02	-18.67%	2.79%
338	Abound Wealth Management	Franklin, Tenn.	787.15	-0.54%	1.38	-24.48%	31.71%
339	WPWealth	Fort Worth, Texas	779.27	-14.79%	1.93	-18.59%	4.66%
340	Stage Harbor Financial	Needham, Mass.	775.23	-7.03%	2.54	-13.13%	7.02%
341	HCM Wealth Advisors	Cincinnati, Ohio	771.84	-9.85%	1.09	-11.51%	1.87%
342	Glass Jacobson Wealth Advisors	Owings Mills, Md.	770.08	10.97%	1.05	-17.27%	34.12%
343	Yeske Buie	San Francisco, Calif.	767.66	-9.94%	2.89	-11.63%	1.92%
344	Rappaport Reiches Capital Management	Skokie, Ill.	765.00	2.68%	1.96	-14.43%	20.00%
345	Southern Financial Group	Birmingham, Ala.	741.14	-11.49%	0.60	-12.27%	0.90%
346	WorthPointe	San Diego, Calif.	733.35	-10.24%	1.29	-12.77%	2.90%
347	Fermata Advisors	Sonoma, Calif.	733.00	47.78%	0.92	-26.11%	100.00%
348	The Advisory Group of San Francisco	San Francisco, Calif.	730.00	-31.24%	4.53	-31.67%	0.63%

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# FA's 2023 RIA RANKING



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
349	Socius Family Office	Fort Lauderdale, Fla.	728.19	-0.75%	4.52	-4.45%	3.87%
350	Omnia Family Wealth	Aventura, Fla.	722.10	6.52%	9.50	5.12%	1.33%
351	Aufman Associates	Sewickley, Pa.	716.06	-18.23%	2.98	-17.21%	-1.23%
352	Ullmann Wealth Partners	Jacksonville Beach, Fla.	706.79	-7.64%	1.72	-18.00%	12.64%
353	Concentus Wealth Advisors	Newtown Square, Pa.	700.00	7.50%	2.46	3.73%	3.64%
354	Souders Financial Advisors	Cincinnati, Ohio	697.06	27.82%	0.77	27.82%	0.00%
355	Chemistry Wealth Management	New York, N.Y.	693.23	-3.04%	1.41	-10.51%	8.35%
356	Blankinship & Foster	Solana Beach, Calif.	690.04	-12.26%	2.27	-13.13%	1.00%
357	Rainey & Randall Investment Management	Celebration, Fla.	677.11	-8.78%	2.06	-16.54%	9.30%
358	The Arkansas Financial Group	Little Rock, Ark.	668.25	-10.14%	1.99	-15.49%	6.33%
359	Briaud Financial Advisors	College Station, Texas	664.29	-2.78%	2.06	-8.20%	5.90%
360	Leisure Capital Management	Costa Mesa, Calif.	664.27	1.40%	2.16	-1.56%	3.01%
361	CapSouth Wealth Management	Dothan, Ala.	661.01	-12.93%	1.50	-15.49%	3.03%
362	Fi3 Financial Advisors	Indianapolis, Ind.	657.21	8.42%	3.59	20.26%	-9.85%
363	Next Level Private	Harrison, N.Y.	656.22	-85.91%	1.64	-88.44%	21.95%
364	Financial Enhancement Group	Anderson, Ind.	650.00	0.00%	0.58	-4.26%	4.44%
365	Chequers Financial Management	San Francisco, Calif.	642.94	8.88%	3.67	-12.89%	25.00%
366	Tobias Financial Advisors	Plantation, Fla.	641.00	-1.38%	2.05	-7.69%	6.83%
367	Porter White Investment Advisors	Birmingham, Ala.	640.66	1.22%	5.48	-1.37%	2.63%
368	StrategicPoint Investment Advisors	Providence, R.I.	637.57	-15.19%	0.94	-16.07%	1.04%
369	PJS Investment Management	Cedarburg, Wis.	637.53	-16.61%	1.42	-17.91%	1.58%
370	Element Pointe Family Office	Miami, Fla.	636.74	11.40%	16.76	23.13%	-9.52%
371	Opal Wealth Advisors	Jericho, N.Y.	633.10	-6.09%	1.02	-15.82%	11.55%
372	Duncan Williams Asset Management	Memphis, Tenn.	632.03	26.10%	1.08	10.39%	14.23%
373	Great Lakes Retirement	Sheffield Village, Ohio	624.94	-9.63%	0.36	-11.84%	2.51%
374	Investmark Advisory Group	Shelton, Conn.	623.17	-4.64%	0.97	-13.81%	10.63%
375	Financial Insights Wealth Management	Tacoma, Wash.	621.06	16.38%	0.70	-2.01%	18.77%
376	Mirador Capital Partners	Pleasanton, Calif.	620.00	-1.90%	1.03	-10.07%	9.09%
377	Shorepoint Capital Partners	Norwood, Mass.	618.34	31.29%	1.62	-5.83%	39.42%
378	BlueSky Wealth Advisors	New Bern, N.C.	612.43	-2.51%	1.74	-4.45%	2.03%
379	KMH Wealth Management	Victoria, Texas	607.04	-6.72%	1.21	-5.23%	-1.57%
380	Fairhaven Wealth Management	Wheaton, Ill.	606.68	-15.62%	1.22	-21.57%	7.59%
381	The L. Warner Companies	Timonium, Md.	605.99	-11.14%	1.97	-7.10%	-4.35%
382	Droms Strauss Wealth Management	Saint Louis, Mo.	592.63	-13.73%	1.50	-20.08%	7.95%
383	Asset Management Group	Stamford, Conn.	590.75	-16.11%	2.26	-15.46%	-0.76%
384	Spectrum Investment Advisors	Mequon, Wis.	590.28	-11.57%	1.52	-17.71%	7.46%
385	Frazier Financial Advisors	Columbus, Ohio	590.00	-4.07%	1.24	-12.14%	9.20%
386	Klaas Financial Asset Advisors	Loves Park, Ill.	587.38	-12.98%	0.55	-11.93%	-1.19%
387	Diesslin Group	Fort Worth, Texas	583.40	-20.10%	2.00	-15.72%	-5.19%
388	High Net Worth Advisory Group	Naples, Fla.	579.04	43.56%	1.54	-4.30%	50.00%
389	McIlrath & Eck	Arlington, Wash.	566.20	-12.27%	0.62	-16.03%	4.47%
390	Summit Wealth Partners	Orlando, Fla.	565.72	-12.82%	0.68	-16.69%	4.65%
391	Greystone Financial Group	Bloomfield Hills, Mich.	564.91	-8.44%	0.81	-17.06%	10.39%
392	Elwood & Goetz Wealth Advisory Group	Athens, Ga.	564.49	1.08%	1.01	-9.97%	12.27%
393	Meritas Wealth Management	Larkspur, Calif.	560.57	23.32%	2.29	21.81%	1.24%
394	Optas Capital	Austin, Texas	548.23	-15.34%	3.94	-23.25%	10.32%
395	Catalyst Financial Partners	Boston, Mass.	547.29	195.33%	3.94	-12.89%	239.02%
396	Excalibur Management Corp.	Newton, Mass.	540.96	-5.42%	1.76	-10.34%	5.48%
397	Rowling & Associates	San Diego, Calif.	529.98	-13.90%	1.46	-17.69%	4.61%
398	Marotta Wealth Management	Charlottesville, Va.	524.76	-7.87%	1.29	0.51%	-8.33%

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# FA's 2023 RIA RANKING

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
399	Net Worth Advisory Group	Sandy, Utah	524.43	-9.84%	0.74	-16.08%	7.44%
400	Financial Management Strategies	Broadview Hts., Ohio	522.31	-14.10%	0.32	-20.11%	7.52%
401	Level Financial Advisors	Amherst, N.Y.	519.65	-4.69%	NA	NA	NA
402	Carolina Wealth Management	Greenville, N.C.	515.88	-12.18%	0.99	-21.27%	11.54%
403	Grand Wealth Management	Grand Rapids, Mich.	509.77	-12.46%	2.74	-20.46%	10.06%
404	J.W. Coons Advisors	Columbus, Ohio	502.57	-2.33%	3.26	-8.04%	6.21%
<b>ASSET CATEGORY: \$250 MILLION TO &lt;\$500 MILLION</b>							
405	Arista Wealth Management	Las Vegas, Nev.	496.55	-9.73%	1.46	-17.72%	9.71%
406	NorthCape Wealth Management	Williamsville, N.Y.	492.81	-4.93%	0.78	-9.31%	4.83%
407	Sikich Financial	Springfield, Ill.	486.38	-3.53%	0.59	-11.88%	9.48%
408	Hopwood Financial Services	Reston, Va.	486.26	-8.56%	1.88	-3.60%	-5.15%
409	Jentner Wealth Management	Akron, Ohio	481.07	-9.16%	1.55	-10.63%	1.64%
410	Bridge Advisory	Pasadena, Calif.	459.17	-9.09%	0.85	-11.10%	2.26%
411	Financial Alternatives	La Jolla, Calif.	458.98	0.10%	1.78	-1.07%	1.18%
412	Gradient Capital Advisors	San Diego, Calif.	457.14	-10.83%	1.06	-11.66%	0.94%
413	Falcon Wealth Planning	Ontario, Calif.	456.45	-13.57%	0.46	-34.75%	32.45%
414	Vance Wealth	Santa Clarita, Calif.	448.75	-11.32%	1.47	-14.81%	4.10%
415	Wilsey Asset Management	San Diego, Calif.	445.97	0.46%	0.56	-10.31%	12.01%
416	Clune & Associates	Chicago, Ill.	433.70	-1.09%	2.15	-5.99%	5.21%
417	JVL Wealth Strategies	Wyoming, Mich.	431.74	-2.17%	3.22	-16.04%	16.52%
418	Manske Wealth Management	Houston, Texas	426.44	7.73%	1.05	-0.78%	8.58%
419	WJ Interests	Sugar Land, Texas	426.00	-6.37%	1.99	-9.00%	2.88%
420	Ballast	Lexington, Ky.	423.41	-8.55%	1.10	-12.84%	4.92%
421	Pinnacle Financial Group	Western Springs, Ill.	421.53	-8.13%	1.23	-10.80%	2.99%
422	Rose Capital Advisors	Miami Beach, Fla.	409.59	13.69%	1.39	-28.46%	58.92%
423	Trinity Financial Advisors	Columbus, Ohio	399.15	10.70%	2.85	-1.16%	12.00%
424	ARQ Wealth Advisors	Scottsdale, Ariz.	397.00	-3.64%	1.27	-12.57%	10.21%
425	Asio Capital	Lexington, Ky.	395.39	-2.44%	1.76	-11.11%	9.76%
426	Asset Planning	Cypress, Calif.	394.38	-11.48%	1.02	-15.60%	4.88%
427	Transitions Wealth Management	Denver, Colo.	391.58	-7.52%	1.00	-10.59%	3.44%
428	Andrews, Lucia Wealth Management	Danville, Calif.	387.62	-3.81%	2.00	-8.28%	4.86%
429	QP Consulting	Takoma Park, Md.	374.78	-11.30%	5.59	-20.56%	11.67%
430	Fiduciary Wealth Management	Reston, Va.	369.46	-12.14%	0.93	-16.12%	4.74%
431	Sandbox Financial Partners	Bethesda, Md.	364.46	-4.23%	0.92	-17.25%	15.74%
432	ShoreHaven Wealth Partners	Red Bank, N.J.	361.43	-5.16%	1.12	-11.01%	6.58%
433	Alpha Financial Advisors	Charlotte, N.C.	353.65	-13.88%	1.48	-15.68%	2.14%
434	Kercheville Advisors	San Antonio, Texas	347.71	5.98%	0.89	9.50%	-3.22%
435	Reston Wealth Management	Reston, W.Va.	345.96	-15.62%	0.74	-17.07%	1.75%
436	Allodium Investment Consultants	Minneapolis, Minn.	342.72	-8.52%	1.44	-14.67%	7.21%
437	Poehling Capital Management	Madison, Wis.	338.09	-10.29%	0.85	-17.69%	8.99%
438	Searcy Financial Services	Overland Park, Kan.	334.44	-8.19%	2.14	13.58%	-19.17%
439	Winch Financial	Appleton, Wis.	333.93	-22.93%	0.39	-28.91%	8.41%
440	StrongBox Wealth	Lee's Summit, Mo.	333.86	-8.67%	0.83	-22.33%	17.60%
441	McCarthy Asset Management	Redwood Shores, Calif.	326.14	-12.80%	1.49	-10.81%	-2.23%
442	Jackson Square Capital	San Francisco, Calif.	316.41	-19.84%	2.96	NA	NA
443	Branson, Fowlkes & Company	Houston, Texas	308.79	-10.48%	1.73	NA	NA
444	Baron Financial Group	Fair Lawn, N.J.	300.65	-13.37%	0.93	-14.44%	1.26%
445	WealthCrest Financial Services	Springfield, Va.	295.29	-3.42%	0.75	-15.22%	13.91%
446	Oliver Capital Management	Seattle, Wash.	289.16	-9.64%	0.58	-18.67%	11.11%
447	R.W. Rogé & Company	Bohemia, N.Y.	288.00	-16.03%	0.98	-20.05%	5.02%

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448	Harbor Financial Grp. dba Harbor Wealth Mgmt.	Boulder, Colo.	283.08	-17.03%	1.48	-20.07%	3.80%
449	Camarda Wealth Advisory Group	Fleming Island, Fla.	282.19	7.09%	0.71	11.41%	-3.88%
450	Sard Wealth Management Group	Atlanta, Ga.	278.84	-8.77%	1.01	-8.77%	0.00%
451	Centerline Wealth Advisors	Louisville, Ky.	275.00	12.24%	1.00	2.04%	10.00%
452	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	274.76	-7.04%	0.71	-17.87%	13.20%
453	Fidato Wealth	Middleburg Heights, Ohio	270.69	-13.00%	1.09	-3.91%	-9.45%
454	Legacy Consulting Group	Plano, Texas	269.23	-17.19%	1.82	-15.51%	-1.99%
455	Fortune Wealth Management	Dallas, Texas	264.57	-11.81%	1.26	-10.13%	-1.87%
456	Merkle Retirement Planning	Grimes, Iowa	262.51	12.08%	0.38	-3.78%	16.47%
457	Sebold Capital Management	Lisle, Ill.	258.71	-15.45%	2.51	-15.45%	0.00%
458	Etesian Wealth Advisors	West Linn, Ore.	258.41	-10.12%	1.46	-26.37%	22.07%
459	Portfolio Wealth Advisors	Albuquerque, N.M.	254.25	-10.79%	0.98	-12.50%	1.96%
460	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	251.24	-16.96%	1.51	-21.96%	6.41%
461	Ted Buchan & Company	San Diego, Calif.	251.00	-7.79%	1.25	-19.26%	14.20%
462	Pearson Creek Capital Management	Chicago, Ill.	250.00	-2.72%	12.50	-2.72%	0.00%
<b>ASSET CATEGORY: \$150 MILLION TO &lt;\$250 MILLION</b>							
463	Family Wealth Advisory Group	Cincinnati, Ohio	232.27	-12.66%	1.21	-16.30%	4.35%
464	Life Planning Partners	Jacksonville, Fla.	232.07	-9.45%	2.44	-9.45%	0.00%
465	Empyrium Wealth Management	Roseville, Calif.	230.80	-6.18%	2.48	-12.23%	6.90%
466	Veripax Wealth Management	Folsom, Calif.	230.48	4.15%	0.84	-1.13%	5.34%
467	Vaughan & Co. Securities	Ridgewood, N.J.	226.00	-16.30%	1.92	-21.97%	7.27%
468	Sharper & Granite	El Segundo, Calif.	224.43	-2.33%	2.18	-4.22%	1.98%
469	O'Keefe Stevens Advisory	Rochester, N.Y.	215.82	-17.60%	1.31	-10.11%	-8.33%
470	FSA Advisors	Warren, Mich.	214.40	8.42%	0.15	-30.48%	55.95%
471	Foresight Capital Management Advisors	Saline, Mich.	212.43	-10.46%	0.43	-17.65%	8.73%
472	Integrated Capital Management	Bloomfield Hills, Mich.	211.17	-6.92%	0.55	-12.97%	6.94%
473	Canter Wealth	San Diego, Calif.	203.47	-3.22%	0.85	-22.25%	24.48%
474	Kemp Financial Management	Fullerton, Calif.	202.72	-8.06%	1.23	-13.07%	5.77%
475	Private Capital Management	Larkspur, Calif.	200.45	-3.79%	3.40	-10.31%	7.27%
476	Cathy Pareto And Associates	Coral Gables, Fla.	197.36	13.47%	NA	NA	NA
477	Fortitude Family Office	Scottsdale, Ariz.	196.35	NA	4.79	NA	NA
478	Kotys Wealth Professionals	Valparaiso, Ind.	189.00	4.13%	0.69	2.60%	1.49%
479	Charleston Financial Advisors	Charleston, S.C.	185.92	-14.15%	1.03	2.54%	-16.28%
480	Granite Financial Group	Brookfield, Wis.	185.10	NA	0.64	NA	-3.33%
481	TABR Capital Management	Orange, Calif.	182.29	1.29%	0.76	-4.17%	5.70%
482	Byrne Asset Management	Kingston, N.J.	180.66	-10.00%	1.32	-11.31%	1.48%
483	Professional Financial Strategies	Pittsford, N.Y.	178.92	-12.12%	1.66	-12.93%	0.93%
484	Center For Asset Management	Palm Beach Gardens, Fla.	174.44	-7.86%	0.85	-1.57%	-6.39%
485	AlbanyAdvisor Group	Albany, N.Y.	172.69	NA	0.67	NA	NA
486	Integras Partners	Alpharetta, Ga.	172.00	-4.44%	1.00	-5.56%	1.18%
487	Longview Financial Advisors	Huntsville, Ala.	171.15	-10.95%	0.82	-16.92%	7.18%
488	RHS Financial	San Francisco, Calif.	165.33	-10.79%	1.14	-4.02%	-7.05%
489	Beacon Financial Advisors	Rye Brook, N.Y.	160.89	-12.25%	3.09	-12.25%	0.00%
490	Westview Investment Advisors	Burlington, Vt.	157.37	-12.94%	1.09	-15.94%	3.57%
491	Purtill Financial	Highland Heights, Ohio	157.36	-13.77%	0.90	-10.80%	-3.33%
492	Gold Medal Waters	Boulder, Colo.	154.95	-8.03%	1.13	-6.02%	-2.14%
<b>ASSET CATEGORY: \$50 MILLION TO &lt;\$150 MILLION</b>							
493	Smith Bruer Advisors	Tallahassee, Fla.	146.53	-7.61%	0.60	-9.11%	1.65%
494	Flagship Capital Management	Media, Pa.	145.00	-2.03%	1.02	-4.79%	2.90%
495	Alpha Wealth Strategies	Cypress, Texas	143.18	-14.10%	4.47	-16.79%	3.23%

\*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.

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# FA's 2023 RIA RANKING

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
496	Elderado Financial	Montrose, Colo.	142.04	0.00%	0.39	-11.20%	12.62%
497	CrossGrain Family Investments	Henrico, Va.	141.96	3.05%	1.92	-2.52%	5.71%
498	Paragon Wealth Management	Provo, Utah	136.58	-8.59%	0.87	-13.83%	6.08%
499	Ivy League Financial Advisors	Rockville, Md.	115.05	-14.45%	1.21	-14.45%	0.00%
500	Steward Advisors	Chicago, Ill.	114.95	-3.18%	1.16	-3.18%	0.00%
501	S.P. Parkin & Co.	Chesterfield, Mo.	107.80	-1.10%	1.52	-10.85%	10.94%
502	Shapiro Financial Security Group	Hazlet, N.J.	105.17	-17.10%	0.83	-17.76%	0.79%
503	Strada Management	West Lake Hills, Texas	100.00	42.86%	1.67	-4.76%	50.00%
504	MTR Financial Services	Kingwood, Texas	80.72	36.34%	0.84	13.62%	20.00%
505	Brighton Financial Planning	Flemington, N.J.	76.49	-14.75%	0.83	-14.75%	0.00%
506	Chilmark Financial Advisors	Miami, Fla.	75.24	-15.86%	1.39	-14.30%	-1.82%
507	Meritas Advisors	San Rafael, Calif.	72.23	-7.21%	1.44	3.92%	-10.71%
508	Graf Financial	Baton Rouge, La.	71.87	-5.70%	1.03	-5.70%	0.00%
509	Sherwood Investments	Redmond, Wash.	70.00	0.00%	1.40	NA	NA
510	Oak Street Advisors	Myrtle Beach, S.C.	69.96	-1.58%	0.53	-8.29%	7.32%
511	Walnut Investment Services	Brooklyn, N.Y.	61.00	-8.96%	0.58	-10.69%	1.94%
512	Holbrook Management	Dallas, Texas	60.51	0.00%	1.03	-16.95%	20.41%
513	Ankerstar Wealth	Round Rock, Texas	52.28	6.06%	0.33	-8.80%	16.30%
514	Shriver Investments	Parker, Colo.	40.71	-21.07%	0.56	-17.83%	-3.95%
515	The Leonard Financial Group	Riverside, Calif.	34.49	-19.80%	0.51	-41.03%	36.00%
516	Safe Harbor Asset Management	Huntington, N.Y.	34.33	-20.72%	0.37	-23.28%	3.33%
517	Birch Investment Management	Brookings, S.D.	18.22	4.99%	0.32	6.83%	-1.72%
518	Venn Wealth & Benefit Services	Altoona, Pa.	17.19	4.42%	0.20	-25.58%	40.32%
519	Aurora Strategic Advisors	Lumberton, N.C.	15.50	29.17%	0.07	43.39%	-9.92%
520	Savant Wealth Management	Rockford, Ill.	13.40	2.29%	0.00	-17.66%	24.22%
521	Atherean Wealth Management	Jersey City, N.J.	6.95	-13.93%	0.26	-10.74%	-3.57%

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# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)*
<b>ASSET CATEGORY: \$1 BILLION AND OVER</b>					
1	CAPTRUST	Raleigh, N.C.	126,201.97	651,095.77	777,297.74
2	Edelman Financial Engines	Boston, Mass.	241,970.18	0.00	241,970.18
3	SageView Advisory Group	Newport Beach, Calif.	13,985.36	142,414.06	156,399.42
4	Hightower Advisors	Chicago, Ill.	104,306.13	924.08	105,230.21
5	Fort Washington Investment Advisors	Cincinnati, Ohio	70,711.25	326.56	71,037.80
6	Mariner Wealth Advisors	Overland Park, Kan.	53,006.92	12,867.65	65,874.57
7	Wealth Enhancement Advisory Services	Plymouth, Minn.	50,048.47	6,344.25	56,392.71
8	CIBC Private Wealth Advisors	Atlanta, Ga.	46,258.12	1,260.12	47,518.25
9	Cerity Partner	New York, N.Y.	36,934.48	3,499.09	40,433.57
10	Fiducient Advisors	Chicago, Ill.	16,528.01	23,492.76	40,020.77
11	Kayne Anderson Rudnick Investment Mgmt.	Los Angeles, Calif.	33,531.27	0.00	33,531.27
12	Moneta	St. Louis, Mo.	18,845.31	11,806.07	30,651.38
13	Silvercrest Asset Management Group	New York, N.Y.	20,851.02	8,053.97	28,904.99
14	Evoke Advisors*	Los Angeles, Calif.	10,201.07	14,739.00	24,940.07
15	Pathstone	Englewood, N.J.	16,475.91	8,359.95	24,835.86
16	Advanced Capital Group	Minneapolis, Minn.	835.12	23,865.37	24,700.48
17	Cresset Asset Management	Chicago, Ill.	22,774.09	1,837.83	24,611.93
18	BBR Partners	New York, N.Y.	21,908.60	2,173.00	24,081.60
19	Beacon Pointe Advisors	Newport Beach, Calif.	21,165.29	2,080.44	23,245.73
20	Segall Bryant & Hamill	Chicago, Ill.	22,188.52	50.55	22,239.08
21	Buckingham Strategic Wealth	Saint Louis, Miss.	20,520.99	1,558.60	22,079.59
22	Carson Wealth	Omaha, Neb.	19,921.67	21.89	19,943.56
23	AE Wealth Management	Topeka, Kan.	19,248.84	0.00	19,248.84
24	The Colony Group	Boston, Mass.	16,362.19	2,467.02	18,829.21
25	Wealthspire Advisors	New York, N.Y.	18,454.61	317.49	18,772.10
26	1919 Investment Counsel	New York, N.Y.	17,256.47	122.52	17,378.99
27	Bahl & Gaynor	Cincinnati, Ohio	16,764.56	337.97	17,102.53
28	Plante Moran Financial Advisors	Southfield, Mich.	7,645.22	9,097.30	16,742.52
29	Johnson Investment Counsel	Cincinnati, Ohio	16,129.98	183.93	16,313.91
30	MAI Capital Management	Cleveland, Ohio	14,219.03	1,554.40	15,773.43
31	Oxford Financial Group	Carmel, Ind.	6,537.29	9,050.62	15,587.91
32	Allworth Financial	Folsom, Calif.	14,367.45	513.37	14,880.81
33	Newport Capital Group	Red Bank, N.J.	246.08	14,419.91	14,665.99
34	Lido Advisors	Los Angeles, Calif.	12,642.50	459.56	13,102.07
35	Aspiriant	Los Angeles, Calif.	10,376.39	2,593.08	12,969.47
36	Homrich Berg	Atlanta, Ga.	10,832.64	1,695.67	12,528.31
37	Choreo	Minneapolis, Minn.	12,065.55	124.56	12,190.11
38	Appleton Partners	Boston, Mass.	12,139.35	0.00	12,139.35
39	WE Family Offices	Miami, Fla.	0.00	12,056.43	12,056.43
40	myCIO Wealth Partners	Philadelphia, Pa.	478.74	11,528.64	12,007.38
41	Signature Estate & Investment Advisors	Los Angeles, Calif.	1,026.43	10,639.47	11,665.90
42	Evercore Wealth Management	New York, N.Y.	10,467.07	70.05	10,537.12
43	Clearstead Advisors	Cleveland, Ohio	6,789.15	3,438.69	10,227.85
44	Mason Investment Advisory Services	Reston, Va.	9,839.17	255.31	10,094.48
45	CliftonLarsonAllen Wealth Advisors	Minneapolis, Minn.	4,988.58	5,101.42	10,090.00
46	Gresham Partners	Chicago, Ill.	6,546.16	2,980.98	9,527.15
47	Brighton Jones	Seattle, Wash.	9,374.98	83.40	9,458.38
48	Williams Jones Wealth Management	New York, N.Y.	9,241.43	83.64	9,325.07
49	IRA Group	Atlanta, Ga.	568.62	8,506.42	9,075.04

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# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)*
50	GW & Wade	Wellesley, Mass.	8,891.94	10.78	8,902.73
51	The Mather Group	Chicago, Ill.	7,831.54	887.17	8,718.72
52	CV Advisors	Aventura, Fla.	529.10	7,886.28	8,415.39
53	Freestone Capital Management	Seattle, Wash.	6,104.44	2,116.63	8,221.07
54	TAG Associates	New York, N.Y.	309.80	7,761.69	8,071.49
55	Anchor Capital Advisors	Boston, Mass.	2,691.77	5,316.28	8,008.06
56	Mill Creek Capital Advisors	Conshohocken, Pa.	566.20	73.06	7,876.36
57	Johnson Wealth	Racine, Wis.	6,188.42	1,557.82	7,746.24
58	Tolleson Wealth Management	Dallas, Texas	7,425.00	168.00	7,593.00
59	Brookstone Capital Management	Wheaton, Ill.	7,514.38	0.00	7,514.38
60	Kovitz Investment Group Partners	Chicago, Ill.	7,293.64	0.00	7,293.64
61	Clarfeld Financial Advisors	Tarrytown, N.Y.	4,638.42	2,467.20	7,105.62
62	Valeo Financial Services	Carmel, Ind.	5,491.50	1,612.21	7,103.71
63	Douglas C. Lane & Associates	New York, N.Y.	7,045.88	0.00	7,045.88
64	Forum Financial Management	Lombard, Ill.	6,922.89	82.67	7,005.56
65	Conrad Siegel Investment Advisors	Harrisburg, Pa.	2,303.66	4,683.99	6,987.64
66	Bartlett Wealth Management	Cincinnati, Ohio	6,911.17	37.70	6,948.87
67	Welch & Forbes	Boston, Mass.	6,615.24	195.59	6,810.84
68	Modera Wealth Management	Westwood, N.J.	6,755.11	45.69	6,800.79
69	Connectus Wealth Advisers	Hunt Valley, Md.	6,677.52	96.27	6,773.79
70	Cornerstone Advisors Asset Management	Bethlehem, Pa.	3,289.02	3,348.56	6,637.58
71	Circle Wealth Management	Summit, N.J.	1,469.04	5,082.13	6,551.18
72	Wetherby Asset Management	San Francisco, Calif.	6,253.00	278.46	6,531.45
73	Coldstream Wealth Management	Bellevue, Wash.	6,284.25	214.00	6,498.24
74	Ropes Wealth Advisors	Marblehead, Mass.	6,249.92	248.29	6,498.20
75	Adviser Investments	Newton, Mass.	6,450.00	0.16	6,450.16
76	RMB Capital	Chicago, Ill.	6,076.56	294.33	6,370.89
77	SignatureFD	Atlanta, Ga.	5,570.10	576.67	6,146.77
78	Altair Advisors	Chicago, Ill.	2,380.04	3,634.15	6,014.19
79	Greenspring Advisors	Towson, Md.	2,352.47	3,647.64	6,000.12
80	Caprock	Boise, Idaho	5,701.52	218.33	5,919.85
81	Joel Isaacson & Co.	New York, N.Y.	3,519.34	2,392.00	5,911.34
82	Parallel Advisors	San Francisco, Calif.	5,705.59	2.54	5,708.13
83	Bradley, Foster & Sargent	Hartford, Conn.	5,626.00	3.52	5,629.52
84	Heck Capital Advisors	Rhineland, Wis.	1,363.58	4,256.75	5,620.33
85	Advisors Capital Management	Ridgewood, N.J.	5,601.71	0.00	5,601.71
86	Plancorp	St. Louis, Mo.	5,268.47	276.95	5,545.42
87	Waverly Advisors	Birmingham, Ala.	5,178.99	331.90	5,510.88
88	WMS Partners	Towson, Md.	3,225.00	1,930.00	5,155.00
89	Simon Quick Advisors	Morristown, N.J.	4,538.51	565.47	5,103.98
90	Bailard	Foster City, Calif.	5,065.83	17.55	5,083.39
91	Thrivent Advisor Network	Minneapolis, Minn.	4,963.10	95.33	5,058.43
92	HBKS Wealth Advisors	Erie, Pa.	4,901.86	89.89	4,991.76
93	First Foundation Advisors	Irvine, Calif.	4,894.67	90.61	4,985.28
94	Mission Wealth Management	Santa Barbara, Calif.	4,154.81	820.75	4,975.56
95	Beacon Capital Management	Dayton, Ohio	4,890.17	32.13	4,922.30
96	Perigon Wealth Management	San Francisco, Calif.	4,043.96	786.41	4,830.37
97	Ingalls & Snyder	New York, N.Y.	4,623.10	134.39	4,757.49
98	Wilbanks, Smith & Thomas Asset Management	Norfolk, Va.	4,716.73	37.80	4,754.54
99	Alesco Advisors	Pittford, N.Y.	4,028.13	672.77	4,700.91

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# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)*
100	GYL Financial Synergies	West Hartford, Conn.	3,062.47	1,584.48	4,646.95
101	Northside Capital Management	Hood River, Ore.	2,551.34	2,084.35	4,635.69
102	Sendero Wealth Management	San Antonio, Texas	847.19	3,668.80	4,515.99
103	JMG Financial Group	Downers Grove, Ill.	4,315.00	186.00	4,501.00
104	Zhang Financial	Portage, Mich.	2,705.83	1,758.63	4,464.46
105	Shuster Advisory Group	Pasadena, Calif.	4,313.47	69.64	4,383.11
106	Pure Financial Advisors	San Diego, Calif.	4,303.03	58.70	4,361.73
107	Index Fund Advisors	Irvine, Calif.	4,353.56	0.00	4,353.56
108	Klingenstein Fields Advisors	New York, N.Y.	3,563.82	750.46	4,314.28
109	Fort Pitt Capital Group	Pittsburgh, Pa.	4,295.05	7.89	4,302.94
110	F.L.Putnam Investment Management Co.	Wellesley, Mass.	4,207.76	94.94	4,302.70
111	Linscomb & Williams	Houston, Texas	4,255.39	1.31	4,256.70
112	Iron Capital Advisors	Atlanta, Ga.	1,105.66	3,119.36	4,225.02
113	Truepoint Wealth Counsel	Cincinnati, Ohio	4,190.11	20.46	4,210.57
114	Palisade Capital Management	Fort Lee, N.J.	4,171.00	35.86	4,206.86
115	Badgley Phelps Wealth Managers	Seattle, Wash.	3,868.76	337.43	4,206.19
116	Annex Wealth Management	Elm Grove, Wis.	4,040.89	163.15	4,204.03
117	Permanens Capital Partners	Charleston, S.C.	2,516.46	1,677.25	4,193.71
118	Empirical Wealth Management	Seattle, Wash.	4,173.41	5.52	4,178.93
119	Grimes & Company	Westborough, Mass.	4,094.11	83.47	4,177.58
120	Finaccess Advisors	Miami, Fla.	0.00	4,139.67	4,139.67
121	Miracle Mile Advisors	Los Angeles, Calif.	4,130.63	0.00	4,130.63
122	Crestwood Advisors Group	Boston, Mass.	4,036.39	20.80	4,057.19
123	Cassaday & Company	Mclean, Va.	4,033.82	0.00	4,033.82
124	Gradient Investments	Arden Hills, Minn.	4,017.97	0.00	4,017.97
125	Bordeaux Wealth Advisors	Menlo Park, Calif.	3,312.22	694.46	4,006.68
126	Crescent Grove Advisors	Lake Forest, Ill.	3,861.63	51.28	3,912.91
127	Chicago Partners Wealth Advisors	Chicago, Ill.	3,484.34	416.58	3,900.92
128	Allegheny Financial Group	Pittsburgh, Pa.	3,567.93	221.93	3,789.86
129	Exencial Wealth Advisors	Oklahoma City, Okla.	3,564.85	204.79	3,769.64
130	Hamilton Capital	Columbus, Ohio	3,536.98	220.90	3,757.88
131	Brownson, Rehms & Foxworth	Chicago, Ill.	0.00	3,722.14	3,722.14
132	Robertson Stephens Wealth Management	San Francisco, Calif.	2,912.09	781.94	3,694.03
133	Kovack Advisors	Fort Lauderdale, Fla.	2,954.83	695.86	3,650.70
134	Crestone Capital	Boulder, Colo.	3,429.19	217.33	3,646.52
135	Certuity (formerly Camden Capital)	North Palm Beach, Fla.	2,390.68	1,251.11	3,641.79
136	Clifford Swan Investment Counselors	Pasadena, Calif.	3,091.00	539.00	3,630.00
137	Kingsview Wealth Management	Grants Pass, Ore.	3,584.12	0.00	3,584.12
138	Advance Capital Management	Southfield, Mich.	3,529.08	40.85	3,569.93
139	Westmount Asset Management	Los Angeles, Calif.	3,030.89	534.74	3,565.63
140	Callan Family Office**	Radnor, Pa.	3,047.55	493.42	3,540.97
141	Mainstay Capital Management	Grand Blanc, Mich.	3,051.72	385.62	3,437.34
142	TCI Wealth Advisors	Tucson, Ariz.	3,414.41	17.12	3,431.53
143	Axxcess Wealth Management	Carlsbad, Calif.	2,748.21	651.40	3,399.62
144	Wescott Financial Advisory Group	Philadelphia, Pa.	2,384.00	1,002.14	3,386.14
145	TFO Phoenix	Phoenix, Ariz.	3,327.82	12.64	3,340.45
146	Retirement Planners of America	Plano, Texas	3,175.53	164.11	3,339.63
147	Merriman Wealth Management	Seattle, Wash.	3,297.16	0.00	3,297.16
148	TFO-TDC dba TDC Investment Advisory	Maumee, Ohio	3,199.09	24.44	3,223.54
149	Family Management Corporation	New York, N.Y.	3,117.13	38.15	3,155.27

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# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)*
150	Heritage Investors Management Corporation	Bethesda, Md.	3,117.15	9.65	3,126.80
151	Foster Group	West Des Moines, Iowa	2,964.08	119.21	3,083.30
152	Constellation Wealth Advisors	Cincinnati, Ohio	1,701.64	1,345.70	3,047.34
153	Sand Hill Global Advisors	Palo Alto, Calif.	2,968.44	69.49	3,037.94
154	True North Advisors	Dallas, Texas	2,962.27	44.13	3,006.40
155	Carlson Capital Management	Northfield, Minn.	2,968.55	24.81	2,993.36
156	CM Wealth Advisors	Beachwood, Ohio	2,852.29	132.23	2,984.53
157	JFS Wealth Advisors	Hermitage, Pa.	2,637.78	345.90	2,983.68
158	Telemus Capital	Southfield, Mich.	2,391.50	580.70	2,972.20
159	Accredited Investors Wealth Management	Edina, Minn.	2,771.91	184.45	2,956.36
160	Altium Wealth Management	Purchase, N.Y.	2,942.45	0.00	2,942.45
161	Sowell Management	North Little Rock, Ark.	2,892.38	0.38	2,892.76
162	Lake Street Advisors	Portsmouth, N.H.	1,066.13	1,822.26	2,888.38
163	CreativeOne Wealth	Overland Park, Kan.	2,879.55	0.00	2,879.55
164	AGW Capital Advisors	Tampa, Fla.	785.18	2,073.60	2,858.78
165	Schechter Investment Advisors	Birmingham, Mich.	2,473.05	374.00	2,847.05
166	Abacus Wealth Partners	Santa Monica, Calif.	2,820.59	13.85	2,834.45
167	GenTrust	Miami, Fla.	2,426.45	376.02	2,802.47
168	Bragg Financial Advisors	Charlotte, N.C.	2,798.67	0.00	2,798.67
169	The Wealth Consulting Group	Las Vegas, Nev.	2,795.71	0.09	2,795.80
170	Klingman & Associates	New York, N.Y.	2,523.01	254.25	2,777.26
171	HoyleCohen	San Diego, Calif.	2,739.82	0.00	2,739.82
172	Halbert Hargrove	Long Beach, Calif.	2,586.64	148.39	2,735.03
173	Beaumont Financial Partners	Needham, Mass.	1,972.61	753.89	2,726.50
174	Yale Capital Corp.	Saint Petersburg, Fla.	2,722.85	0.00	2,722.85
175	Smith Salley Wealth Management	Greensboro, N.C.	2,709.13	0.47	2,709.59
176	Sage Financial Group	Conshohocken, Pa.	2,500.00	202.00	2,702.00
177	Evensky Katz	Coral Gables, Fla.	2,640.71	0.00	2,640.71
178	Henssler Financial	Kennesaw, Ga.	2,174.53	464.83	2,639.37
179	Coastal Bridge Advisors	Westport, Conn.	2,605.17	15.01	2,620.18
180	Wealthcare Capital Management	Richmond, Va.	2,570.37	32.68	2,603.04
181	Connecticut Wealth Management	Farmington, Conn.	2,506.96	82.94	2,589.91
182	Dakota Wealth	Palm Beach Gardens, Fla.	2,543.35	4.80	2,548.15
183	IFG Advisory	Atlanta, Ga.	2,421.18	111.47	2,532.64
184	The Welch Group	Birmingham, Ala.	2,522.23	0.00	2,522.23
185	GM Advisory Group	Melville, N.Y.	1,643.83	870.88	2,514.70
186	Wellesley Asset Management	Wellesley, Mass.	2,392.07	2.45	2,394.52
187	Morton Wealth	Calabasas, Calif.	2,342.28	35.43	2,377.71
188	MCF Advisors	Covington, Ky.	1,587.06	739.05	2,326.11
189	XML Financial Group	Bethesda, Md.	1,318.34	1,004.70	2,323.03
190	Resource Consulting Group	Orlando, Fla.	2,316.72	0.00	2,316.72
191	Bogart Wealth	McLean, Va.	1,496.91	785.31	2,282.22
192	Chicago Capital	Chicago, Ill.	2,245.63	12.24	2,257.87
193	Marcum Wealth	Cleveland, Ohio	2,221.20	29.63	2,250.83
194	Cardiff Park Advisors	Carlsbad, Calif.	78.08	2,128.22	2,206.30
195	Vigilant Wealth Management	Portland, Maine	2,200.86	0.00	2,200.86
196	Baker Avenue Wealth Management	San Francisco, Calif.	2,200.00	0.00	2,200.00
197	Capital Wealth Advisors	Naples, Fla.	2,087.02	90.92	2,177.94
198	Schneider Downs Wealth Mgmt. Advisors	Pittsburgh, Pa.	1,557.74	617.27	2,175.01
199	Team Hewins	Redwood City, Calif.	1,184.19	989.53	2,173.72

\*\*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.

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# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)*
200	FAS Wealth Partners	Leawood, Kan.	2,114.78	40.81	2,155.59
201	Retirement Income Solutions	Ann Arbor, Mich.	2,145.73	0.00	2,145.73
202	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	2,006.00	105.00	2,111.00
203	Gratus Capital	Atlanta, Ga.	2,042.41	60.66	2,103.07
204	Birch Hill Investment Advisors	Boston, Mass.	2,064.58	0.00	2,064.58
205	Arnerich Massena	Portland, Ore.	1,056.16	1,008.20	2,064.37
206	Chesley, Taft & Associates	Chicago, Ill.	1,903.50	155.82	2,059.31
207	Regal Investment Advisors	Kentwood, Mich.	2,026.54	16.21	2,042.75
208	Inspire Investing	Meridian, Idaho	2,031.61	0.00	2,031.61
209	SJS Investment Services	Sylvania, Ohio	2,028.89	0.00	2,028.89
210	Osborne Partners Capital Management	San Francisco, Calif.	1,958.15	40.14	1,998.29
211	Summitry	Foster City, Calif.	1,868.00	120.69	1,988.68
212	CPS Investment Advisors	Lakeland, Fla.	1,988.22	0.00	1,988.22
213	GHP Investment Advisors	Denver, Colo.	1,922.31	62.39	1,984.69
214	Foster & Motley	Cincinnati, Ohio	1,913.32	48.05	1,961.37
215	Zemenick & Walker	Saint Louis, Mo.	0.00	1,959.09	1,959.09
216	CoreCap Advisors	Southfield, Mich.	1,957.27	0.00	1,957.27
217	LVV Advisors	Pittsford, N.Y.	1,450.92	482.87	1,933.79
218	Heritage Financial Services	Westwood, Mass.	1,930.82	0.00	1,930.82
219	RTD Financial Advisors	Philadelphia, Pa.	1,884.72	39.82	1,924.54
220	Certified Advisory Corp	Altamonte Springs, Fla.	1,921.93	0.00	1,921.93
221	Glassman Wealth Services	Vienna, Va.	1,851.07	56.16	1,907.22
222	Performance Wealth	Hinsdale, Ill.	1,888.67	12.36	1,901.03
223	West Financial Services	McLean, Va.	1,881.28	17.41	1,898.69
224	Courier Capital	Buffalo, N.Y.	1,634.24	263.77	1,898.01
225	Obermeyer Wood Investment Counsel	Aspen, Colo.	1,886.99	0.00	1,886.99
226	SFMG Wealth Advisors	Plano, Texas	1,721.26	163.69	1,884.95
227	BLB&B Advisors	Montgomeryville, Pa.	1,766.72	112.23	1,878.94
228	Kowal Investment Group	Waukesha, Wis.	949.00	890.00	1,839.00
229	Capstone Financial Advisors	Downers Grove, Ill.	1,815.27	9.59	1,824.85
230	Guyasuta Investment Advisors	Pittsburgh, Pa.	1,814.72	0.00	1,814.72
231	CFS Investment Advisory Services	Totowa, N.J.	1,121.92	672.55	1,794.47
232	Legacy Wealth Management	Memphis, Tenn.	1,684.16	94.25	1,778.42
233	IPI Wealth Management	Decatur, Ill.	1,628.81	147.98	1,776.79
234	Sather Financial Group	Victoria, Texas	1,764.38	0.00	1,764.38
235	Stonebridge Capital Advisors	Saint Paul, Minn.	1,706.18	54.18	1,760.36
236	Stokes Family Office	New Orleans, La.	1,556.31	175.75	1,732.06
237	Lutz Financial	Omaha, Neb.	1,558.73	172.76	1,731.48
238	Prosperity Capital Advisors	Westlake, Ohio	1,712.43	0.00	1,712.43
239	Fairway Wealth Management	Independence, Ohio	7.20	1,645.29	1,652.49
240	LBMC Investment Advisors	Brentwood, Tenn.	1,610.59	13.07	1,623.66
241	ProVise Management Group	Clearwater, Fla.	1,607.81	8.62	1,616.43
242	Pinnacle Wealth Planning Services	Mansfield, Ohio	1,598.87	10.54	1,609.40
243	Fairview Capital Investment Management	Greenbrae, Calif.	1,540.98	0.00	1,540.98
244	ML&R Wealth Management	Austin, Texas	1,528.21	9.89	1,538.10
245	Conservest Capital Advisors	Wynnewood, Pa.	1,515.92	20.74	1,536.66
246	Tom Johnson Investment Management	Oklahoma City, Okla.	1,519.43	0.00	1,519.43
247	Cornerstone Advisory	Hunt Valley, Md.	1,515.98	0.00	1,515.98
248	Van Hulzen Asset Management	El Dorado Hills, Calif.	1,498.68	14.35	1,513.03
249	Abacus Planning Group	Columbia, S.C.	1,456.26	51.14	1,507.41

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# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)*
250	AlphaCore Wealth Advisory	La Jolla, Calif.	1,124.49	373.04	1,497.53
251	Wealthquest	Cincinnati, Ohio	1,491.11	2.88	1,493.99
252	California Financial Advisors	San Ramon, Calif.	1,262.48	227.47	1,489.95
253	Meyer Capital Group	Marlton, N.J.	993.00	491.00	1,484.00
254	Cabana Asset Management	Fayetteville, Ark.	1,476.78	0.00	1,476.78
255	Red Door Wealth Management	Memphis, Tenn.	1,157.43	286.26	1,443.69
256	Baltimore Washington Financial Advisors	Columbia, Md.	1,365.67	76.91	1,442.58
257	RKL Wealth Management	Lancaster, Pa.	1,260.95	170.90	1,431.85
258	Condor Capital Wealth Management	Martinsville, N.J.	1,164.43	265.10	1,429.53
259	Patriot Investment Management Group	Knoxville, Tenn.	1,409.46	5.38	1,414.83
260	Ensemble Capital Management	San Francisco, Calif.	1,410.95	0.00	1,410.95
261	RZH Advisors	Stamford, Conn.	1,401.65	0.00	1,401.65
262	Berger Financial Group	Plymouth, Minn.	1,400.00	0.00	1,400.00
263	Beaird Harris Wealth Management	Dallas, Texas	1,379.51	19.41	1,398.92
264	Altfest Personal Wealth Management	New York, N.Y.	1,373.29	16.79	1,390.09
265	Elser Financial Planning	Indianapolis, Ind.	660.68	719.17	1,379.85
266	HCR Wealth Advisors	Los Angeles, Calif.	1,374.50	0.00	1,374.50
267	Rebalance	Bethesda, Md.	1,360.00	0.00	1,360.00
268	SilverOak Wealth Management	Edina, Minn.	1,285.37	69.44	1,354.80
269	Tschetter Group	Bellevue, Wash.	965.29	370.77	1,336.06
270	3EDGE Asset Management	Naples, Fla.	1,332.68	0.00	1,332.68
271	HUB Investment Advisors	Omaha, Neb.	260.94	1,054.16	1,315.10
272	Nottingham Advisors	Amherst, N.Y.	1,232.91	68.10	1,301.01
273	Narwhal Capital Management	Marietta, Ga.	1,144.45	151.85	1,296.30
274	Diversified	Wilmington, Del.	1,176.49	113.16	1,289.65
275	SAX Wealth Advisors	Parsippany, N.J.	1,258.46	29.23	1,287.69
276	Austin Asset	Austin, Texas	1,265.58	0.00	1,265.58
277	Magnus Financial Group	New York, N.Y.	1,254.79	5.73	1,260.52
278	Diversified Portfolios	Bloomfield Hills, Mich.	1,232.84	20.62	1,253.46
279	Atwood & Palmer	Kansas City, Mo.	1,251.94	0.00	1,251.94
280	Smith Anglin Financial	Dallas, Texas	1,221.83	23.25	1,245.09
281	Mayflower Advisors	Boston, Mass.	1,028.57	215.00	1,243.57
282	Bitterroot Capital Advisors	Bozeman, Mont.	97.54	1,131.18	1,228.72
283	TFC Financial Management	Boston, Mass.	1,226.53	0.00	1,226.53
284	Azzad Asset Management	Falls Church, Va.	1,219.75	6.14	1,225.89
285	Per Stirling Capital Management	Westlake Hills, Texas	1,184.82	0.00	1,184.82
286	Investment Counsel Company	Las Vegas, Nev.	961.91	218.83	1,180.74
287	Segment Wealth Management	Houston, Texas	1,171.64	0.00	1,171.64
288	Bloom Advisors	Farmington Hills, Mich.	1,155.07	0.00	1,155.07
289	R W Investment Management	Eagle, Idaho	886.91	267.93	1,154.85
290	BigSur Wealth Management	Miami, Fla.	514.70	639.70	1,154.40
291	Traphagen Investment Advisors	Oradell, N.J.	1,128.89	23.10	1,151.99
292	TrinityPoint Wealth	Milford, Conn.	1,036.33	112.70	1,149.03
293	Valley National Adviser	Bethlehem, Pa.	1,129.29	0.00	1,129.29
294	Madison Wealth Management	Cincinnati, Ohio	1,123.86	0.00	1,123.86
295	The Weil Company dba Christopher Weil & Co.	San Diego, Calif.	1,063.47	43.71	1,107.18
296	Telos Capital Management	San Diego, Calif.	1,101.82	0.00	1,101.82
297	Financial Synergies Wealth Advisors	Houston, Texas	1,091.13	0.00	1,091.13
298	Wealthstream Advisors	New York City, N.Y.	1,075.08	0.00	1,075.08
299	Titleist Asset Management	San Antonio, Texas	960.50	112.14	1,072.64

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# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)*
300	Blue Chip Partners	Farmington Hills, Mich.	1,042.90	9.11	1,052.01
301	Sheaff Brock Investment Advisors	Indianapolis, Ind.	1,049.30	0.38	1,049.68
302	Nilsine Partners	Greenwood Village, Colo.	831.50	217.06	1,048.57
303	PDS Planning	Dublin, Ohio	981.16	64.42	1,045.59
304	Weatherly Asset Management	Del Mar, Calif.	1,004.92	8.84	1,013.76
305	Palisade Asset Management	Minneapolis, Minn.	923.73	88.48	1,012.21
306	Paragon Capital Management	Denver, Colo.	883.13	119.67	1,002.80
307	StraightLine Group	Troy, Mich.	953.74	48.82	1,002.56
308	SPC Financial	Rockville, Md.	995.46	4.69	1,000.15
<b>ASSET CATEGORY: \$500 MILLION TO &lt; \$1 BILLION</b>					
309	Delta Financial Group	Basking Ridge, N.J.	934.35	61.96	996.31
310	Destiny Wealth Partners	Tavares, Fla.	883.73	103.24	986.97
311	Wedmont Private Capital	West Chester, Pa.	958.39	25.68	984.07
312	BFSG	Irvine, Calif.	976.61	0.36	976.97
313	Agili	Richmond, Va.	969.90	2.64	972.54
314	CJM Wealth Advisers	Falls Church, Va.	926.54	43.72	970.25
315	Virtue Capital Management	Brentwood, Tenn.	941.39	0.00	941.39
316	Janiczek Wealth Management	Denver, Colo.	940.87	0.00	940.87
317	Cadinha & Co.	Honolulu, Hawaii	931.26	8.09	939.35
318	Regatta Capital Group	El Segundo, Calif.	784.53	146.90	931.43
319	Retirement Investment Advisors	Oklahoma City, Okla.	927.76	2.09	929.85
320	Petersen Hastings Investment Management	Kennewick, Wash.	927.09	0.00	927.09
321	Delegate Advisors	Chapel Hill, N.C.	160.94	741.50	902.44
322	Moisand Fitzgerald Tamayo	Orlando, Fla.	893.47	7.95	901.42
323	NEIRG Wealth Management	North Andover, Mass.	883.23	16.10	899.33
324	REDW Wealth	Albuquerque, N.M.	896.40	0.00	896.40
325	Willis Johnson & Associates	Houston, Texas	848.52	45.70	894.23
326	Total Wealth Planning	Blue Ash, Ohio	819.27	46.54	865.82
327	MJP Wealth Advisers	Farmington, Conn.	853.43	10.95	864.38
328	Apriem Advisors	Irvine, Calif.	854.89	7.17	862.06
329	DiNuzzo Private Wealth	Beaver, Pa.	842.11	0.00	842.11
330	Signet Financial Management	Parsippany, N.J.	839.65	0.00	839.65
331	Halpern Financial	Ashburn, Va.	828.83	0.00	828.83
332	Austin Private Wealth	Austin, Texas	811.83	11.27	823.11
333	Spectrum Wealth Management	Indianapolis, Ind.	758.29	51.72	810.00
334	Evermay Wealth Management	Arlington, Va.	791.10	8.42	799.52
335	Lake Street	Chicago, Ill.	755.33	41.03	796.37
336	Financial Advisory Corporation	Grand Rapids, Mich.	795.72	0.00	795.72
337	Seasons of Advice Wealth Management	New York, N.Y.	751.17	38.11	789.28
338	Abound Wealth Management	Franklin, Tenn.	787.15	0.00	787.15
339	WPWealth	Fort Worth, Texas	513.63	265.64	779.27
340	Stage Harbor Financial	Needham, Mass.	775.23	0.00	775.23
341	HCM Wealth Advisers	Cincinnati, Ohio	771.84	0.00	771.84
342	Glass Jacobson Wealth Advisors	Owings Mills, Md.	759.58	10.50	770.08
343	Yeske Buie	San Francisco, Calif.	759.24	8.43	767.66
344	Rappaport Reiches Capital Management	Skokie, Ill.	765.00	0.00	765.00
345	Southern Financial Group	Birmingham, Ala.	741.14	0.00	741.14
346	WorthPointe	San Diego, Calif.	733.35	0.00	733.35
347	Fermata Advisors	Sonoma, Calif.	670.00	63.00	733.00
348	The Advisory Group of San Francisco	San Francisco, Calif.	730.00	0.00	730.00

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# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)*
349	Socius Family Office	Fort Lauderdale, Fla.	649.42	78.77	728.19
350	Omnia Family Wealth	Aventura, Fla.	602.20	119.90	722.10
351	Aufman Associates	Sewickley, Pa.	716.06	0.00	716.06
352	Ullmann Wealth Partners	Jacksonville Beach, Fla.	699.04	7.75	706.79
353	Concentus Wealth Advisors	Newtown Square, Pa.	679.00	21.00	700.00
354	Souders Financial Advisors	Cincinnati, Ohio	529.22	167.85	697.06
355	Chemistry Wealth Management	New York, N.Y.	685.66	7.57	693.23
356	Blankinship & Foster	Solana Beach, Calif.	690.04	0.00	690.04
357	Rainey & Randall Investment Management	Celebration, Fla.	677.11	0.00	677.11
358	The Arkansas Financial Group	Little Rock, Ark.	668.25	0.00	668.25
359	Briaud Financial Advisors	College Station, Texas	652.09	12.20	664.29
360	Leisure Capital Management	Costa Mesa, Calif.	664.27	0.00	664.27
361	CapSouth Wealth Management	Dothan, Ala.	276.99	384.02	661.01
362	Fi3 Financial Advisors	Indianapolis, Ind.	577.61	79.60	657.21
363	Next Level Private	Harrison, N.Y.	656.22	0.00	656.22
364	Financial Enhancement Group	Anderson, Ind.	650.00	0.00	650.00
365	Chequers Financial Management	San Francisco, Calif.	531.97	110.96	642.94
366	Tobias Financial Advisors	Plantation, Fla.	622.00	19.00	641.00
367	Porter White Investment Advisors	Birmingham, Ala.	638.43	2.23	640.66
368	StrategicPoint Investment Advisors	Providence, R.I.	637.57	0.00	637.57
369	PJS Investment Management	Cedarburg, Wis.	612.67	24.86	637.53
370	Element Pointe Family Office	Miami, Fla.	583.57	53.16	636.74
371	Opal Wealth Advisors	Jericho, N.Y.	456.82	176.28	633.10
372	Duncan Williams Asset Management	Memphis, Tenn.	586.34	45.68	632.03
373	Great Lakes Retirement	Sheffield Village, Ohio	575.67	49.26	624.94
374	Investmark Advisory Group	Shelton, Conn.	623.17	0.00	623.17
375	Financial Insights Wealth Management	Tacoma, Wash.	621.06	0.00	621.06
376	Mirador Capital Partners	Pleasanton, Calif.	620.00	0.00	620.00
377	Shorepoint Capital Partners	Norwood, Mass.	591.21	27.13	618.34
378	BlueSky Wealth Advisors	New Bern, N.C.	612.43	0.00	612.43
379	KMH Wealth Management	Victoria, Texas	598.32	8.72	607.04
380	Fairhaven Wealth Management	Wheaton, Ill.	600.79	5.90	606.68
381	The L. Warner Companies	Timonium, Md.	605.99	0.00	605.99
382	Droms Strauss Wealth Management	Saint Louis, Mo.	589.30	3.33	592.63
383	Asset Management Group	Stamford, Conn.	590.75	0.00	590.75
384	Spectrum Investment Advisors	Mequon, Wis.	586.11	4.17	590.28
385	Frazier Financial Advisors	Columbus, Ohio	550.00	40.00	590.00
386	Klaas Financial Asset Advisors	Loves Park, Ill.	587.38	0.00	587.38
387	Diesslin Group	Fort Worth, Texas	513.78	69.62	583.40
388	High Net Worth Advisory Group	Naples, Fla.	550.09	28.95	579.04
389	McIlrath & Eck	Arlington, Wash.	566.20	0.00	566.20
390	Summit Wealth Partners	Orlando, Fla.	527.32	38.40	565.72
391	Greystone Financial Group	Bloomfield Hills, Mich.	556.35	8.57	564.91
392	Elwood & Goetz Wealth Advisory Group	Athens, Ga.	564.49	0.00	564.49
393	Meritas Wealth Management	Larkspur, Calif.	560.57	0.00	560.57
394	Optas Capital	Austin, Texas	548.23	0.00	548.23
395	Catalyst Financial Partners	Boston, Mass.	533.10	14.19	547.29
396	Excalibur Management Corp.	Newton, Mass.	534.24	6.72	540.96
397	Rowling & Associates	San Diego, Calif.	501.81	28.17	529.98
398	Marotta Wealth Management	Charlottesville, Va.	504.64	20.12	524.76

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# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)*
399	Net Worth Advisory Group	Sandy, Utah	322.57	201.87	524.43
400	Financial Management Strategies	Broadview Hts., Ohio	423.12	99.19	522.31
401	Level Financial Advisors	Amherst, N.Y.	519.65	0.00	519.65
402	Carolina Wealth Management	Greenville, N.C.	2.18	513.70	515.88
403	Grand Wealth Management	Grand Rapids, Mich.	509.77	0.00	509.77
404	J.W. Coons Advisors	Columbus, Ohio	449.38	53.19	502.57
<b>ASSET CATEGORY: \$250 MILLION TO &lt;\$500 MILLION</b>					
405	Arista Wealth Management	Las Vegas, Nev.	391.19	105.36	496.55
406	NorthCape Wealth Management	Williamsville, N.Y.	477.69	15.13	492.81
407	Sikich Financial	Springfield, Ill.	486.38	0.00	486.38
408	Hopwood Financial Services	Reston, Va.	486.26	0.00	486.26
409	Jentner Wealth Management	Akron, Ohio	481.07	0.00	481.07
410	Bridge Advisory	Pasadena, Calif.	427.38	31.79	459.17
411	Financial Alternatives	La Jolla, Calif.	455.45	3.53	458.98
412	Gradient Capital Advisors	San Diego, Calif.	392.91	64.23	457.14
413	Falcon Wealth Planning	Ontario, Calif.	454.15	2.31	456.45
414	Vance Wealth	Santa Clarita, Calif.	370.77	77.97	448.75
415	Wilsey Asset Management	San Diego, Calif.	444.88	1.09	445.97
416	Clune & Associates	Chicago, Ill.	260.66	173.05	433.70
417	JVL Wealth Strategies	Wyoming, Mich.	422.32	9.42	431.74
418	Manske Wealth Management	Houston, Texas	426.44	0.00	426.44
419	WJ Interests	Sugar Land, Texas	426.00	0.00	426.00
420	Ballast	Lexington, Ky.	402.81	20.60	423.41
421	Pinnacle Financial Group	Western Springs, Ill.	398.32	23.21	421.53
422	Rose Capital Advisors	Miami Beach, Fla.	245.47	164.13	409.59
423	Trinity Financial Advisors	Columbus, Ohio	399.15	0.00	399.15
424	ARQ Wealth Advisors	Scottsdale, Ariz.	395.00	2.00	397.00
425	Asio Capital	Lexington, Ky.	393.29	2.10	395.39
426	Asset Planning	Cypress, Calif.	393.29	1.09	394.38
427	Transitions Wealth Management	Denver, Colo.	391.58	0.00	391.58
428	Andrews, Lucia Wealth Management	Danville, Calif.	387.62	0.00	387.62
429	QP Consulting	Takoma Park, Md.	49.52	325.26	374.78
430	Fiduciary Wealth Management	Reston, Va.	104.87	264.60	369.46
431	Sandbox Financial Partners	Bethesda, Md.	330.33	34.13	364.46
432	ShoreHaven Wealth Partners	Red Bank, N.J.	342.02	19.41	361.43
433	Alpha Financial Advisors	Charlotte, N.C.	353.65	0.00	353.65
434	Kercheville Advisors	San Antonio, Texas	339.64	8.06	347.71
435	Reston Wealth Management	Reston, W.Va.	334.84	11.12	345.96
436	Allodium Investment Consultants	Minneapolis, Minn.	342.72	0.00	342.72
437	Poehling Capital Management	Madison, Wis.	338.09	0.00	338.09
438	Searcy Financial Services	Overland Park, Kan.	329.51	4.94	334.44
439	Winch Financial	Appleton, Wis.	333.93	0.00	333.93
440	StrongBox Wealth	Lee's Summit, Mo.	315.77	18.09	333.86
441	McCarthy Asset Management	Redwood Shores, Calif.	326.14	0.00	326.14
442	Jackson Square Capital	San Francisco, Calif.	211.58	104.83	316.41
443	Branson, Fowlkes & Company	Houston, Texas	262.82	45.98	308.79
444	Baron Financial Group	Fair Lawn, N.J.	297.14	3.51	300.65
445	WealthCrest Financial Services	Springfield, Va.	295.29	0.00	295.29
446	Oliver Capital Management	Seattle, Wash.	34.28	254.87	289.16
447	R.W. Rogé & Company	Bohemia, N.Y.	273.00	15.00	288.00

\*\*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.

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# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)*
448	Harbor Financial Group dba Harbor Wealth Mgmt.	Boulder, Colo.	278.78	4.30	283.08
449	Camarda Wealth Advisory Group	Fleming Island, Fla.	275.39	6.80	282.19
450	Sard Wealth Management Group	Atlanta, Ga.	265.76	13.08	278.84
451	Centerline Wealth Advisors	Louisville, Ky.	250.00	25.00	275.00
452	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	274.76	0.00	274.76
453	Fidato Wealth	Middleburg Heights, Ohio	270.69	0.00	270.69
454	Legacy Consulting Group	Plano, Texas	257.28	11.95	269.23
455	Fortune Wealth Management	Dallas, Texas	259.17	5.40	264.57
456	Merkle Retirement Planning	Grimes, Iowa	262.51	0.00	262.51
457	Sebold Capital Management	Lisle, Ill.	196.25	62.46	258.71
458	Etesian Wealth Advisors	West Linn, Ore.	251.84	6.57	258.41
459	Portfolio Wealth Advisors	Albuquerque, N.M.	254.25	0.00	254.25
460	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	242.02	9.22	251.24
461	Ted Buchan & Company	San Diego, Calif.	223.03	27.97	251.00
462	Pearson Creek Capital Management	Chicago, Ill.	250.00	0.00	250.00
<b>ASSET CATEGORY: \$150 MILLION TO &lt;\$250 MILLION</b>					
463	Family Wealth Advisory Group	Cincinnati, Ohio	156.31	75.96	232.27
464	Life Planning Partners	Jacksonville, Fla.	231.54	0.53	232.07
465	Empyrion Wealth Management	Roseville, Calif.	230.80	0.00	230.80
466	Veripax Wealth Management	Folsom, Calif.	229.65	0.83	230.48
467	Vaughan & Co. Securities	Ridgewood, N.J.	200.00	26.00	226.00
468	Sharper & Granite	El Segundo, Calif.	224.43	0.00	224.43
469	O'Keefe Stevens Advisory	Rochester, N.Y.	215.82	0.00	215.82
470	FSA Advisors	Warren, Mich.	212.34	2.05	214.40
471	Foresight Capital Management Advisors	Saline, Mich.	211.25	1.18	212.43
472	Integrated Capital Management	Bloomfield Hills, Mich.	211.17	0.00	211.17
473	Canter Wealth	San Diego, Calif.	203.47	0.00	203.47
474	Kemp Financial Management	Fullerton, Calif.	0.00	202.72	202.72
475	Private Capital Management	Larkspur, Calif.	187.63	12.82	200.45
476	Cathy Pareto And Associates	Coral Gables, Fla.	197.36	0.00	197.36
477	Fortitude Family Office	Scottsdale, Ariz.	167.55	28.79	196.35
478	Kotys Wealth Professionals	Valparaiso, Ind.	189.00	0.00	189.00
479	Charleston Financial Advisors	Charleston, S.C.	184.28	1.64	185.92
480	Granite Financial Group	Brookfield, Wis.	162.90	22.20	185.10
481	TABR Capital Management	Orange, Calif.	182.29	0.00	182.29
482	Byrne Asset Management	Kingston, N.J.	180.66	0.00	180.66
483	Professional Financial Strategies	Pittsford, N.Y.	151.00	27.93	178.92
484	Center For Asset Management	Palm Beach Gardens, Fla.	174.44	0.00	174.44
485	AlbanyAdvisor Group	Albany, N.Y.	9.30	163.38	172.69
486	Integras Partners	Alpharetta, Ga.	172.00	0.00	172.00
487	Longview Financial Advisors	Huntsville, Ala.	171.05	0.10	171.15
488	RHS Financial	San Francisco, Calif.	158.34	6.99	165.33
489	Beacon Financial Advisors	Rye Brook, N.Y.	149.87	11.02	160.89
490	Westview Investment Advisors	Burlington, Vt.	155.76	1.61	157.37
491	Purtill Financial	Highland Heights, Ohio	0.00	157.36	157.36
492	Gold Medal Waters	Boulder, Colo.	148.62	6.33	154.95
<b>ASSET CATEGORY: \$50 MILLION TO &lt;\$150 MILLION</b>					
493	Smith Bruer Advisors	Tallahassee, Fla.	99.57	46.96	146.53
494	Flagship Capital Management	Media, Pa.	145.00	0.00	145.00
495	Alpha Wealth Strategies	Cypress, Texas	143.18	0.00	143.18

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# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)*
496	Elderado Financial	Montrose, Colo.	142.04	0.00	142.04
497	CrossGrain Family Investments	Henrico, Va.	121.02	20.94	141.96
498	Paragon Wealth Management	Provo, Utah	128.18	8.39	136.58
499	Ivy League Financial Advisors	Rockville, Md.	115.05	0.00	115.05
500	Steward Advisors	Chicago, Ill.	111.80	3.15	114.95
501	S.P. Parkin & Co.	Chesterfield, Mo.	107.80	0.00	107.80
502	Shapiro Financial Security Group	Hazlet, N.J.	93.19	11.98	105.17
503	Strada Management	West Lake Hills, Texas	10.00	90.00	100.00
504	MTR Financial Services	Kingwood, Texas	80.72	0.00	80.72
505	Brighton Financial Planning	Flemington, N.J.	69.20	7.29	76.49
506	Chilmark Financial Advisors	Miami, Fla.	75.24	0.00	75.24
507	Meritas Advisors	San Rafael, Calif.	63.23	9.00	72.23
508	Graf Financial	Baton Rouge, La.	71.38	0.49	71.87
509	Sherwood Investments	Redmond, Wash.	70.00	0.00	70.00
510	Oak Street Advisors	Myrtle Beach, S.C.	69.66	0.30	69.96
511	Walnut Investment Services	Brooklyn, N.Y.	61.00	0.00	61.00
512	Holbrook Management	Dallas, Texas	60.51	0.00	60.51
513	Ankerstar Wealth	Round Rock, Texas	46.45	5.83	52.28
514	Shriver Investments	Parker, Colo.	40.71	0.00	40.71
515	The Leonard Financial Group	Riverside, Calif.	33.40	1.09	34.49
516	Safe Harbor Asset Management	Huntington, N.Y.	34.33	0.00	34.33
517	Birch Investment Management	Brookings, S.D.	18.22	0.00	18.22
518	Venn Wealth & Benefit Services	Altoona, Pa.	16.18	1.01	17.19
519	Aurora Strategic Advisors	Lumberton, N.C.	4.00	11.50	15.50
520	Savant Wealth Management	Rockford, Ill.	13.40	0.00	13.40
521	Atherean Wealth Management	Jersey City, N.J.	3.46	3.49	6.95

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