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RANKING**

2024

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TOP 50

FASTEST-GROWING FIRMS

Firms with more than \$500 million in AUM.



GROWTH RANK	FIRM NAME	LOCATION	2023 CLIENTS	YEAR END 2023 ASSETS (\$MM)*	% GROWTH IN ASSETS 2022-2023	% GROWTH IN ASSETS PER CLIENT
1	Mayflower Advisors	Boston, Mass.	958	4,675.58	275.98%	212.40%
2	Compound Planning	New York, N.Y.	2,165	1,395.95	224.78%	110.77%
3	Rebalance	Bethesda, Md.	592	1,312.75	113.45%	129.31%
4	Pathstone	Englewood, N.J.	1,897	48,013.14	93.32%	57.65%
5	Axxcess Wealth Management	Carlsbad, Calif.	10,739	6,470.76	90.34%	-12.57%
6	The Wealth Consulting Group	Las Vegas, Nev.	13,479	5,194.18	85.78%	2.09%
7	Modera Wealth Management	Westwood, N.J.	5,701	12,532.44	84.28%	-13.02%
8	Savant Wealth Management	Rockford, Ill.	16,294	24,397.51	81.70%	7.40%
9	Falcon Wealth Planning	Ontario, Calif.	1,423	825.83	80.92%	-13.67%
10	AlphaCore Wealth Advisory	San Diego, Calif.	1,330	2,441.97	63.07%	36.71%
11	Shorepoint Capital Partners	Norwood, Mass.	485	736.23	56.32%	24.09%
12	Chicago Capital	Chicago, Ill.	682	3,525.46	56.14%	35.08%
13	Kovitz Investment Group Partners ‡	Chicago, Ill.	2,432	11,290.75	54.80%	42.01%
14	Sikich Financial	Springfield, Ill.	747	749.06	54.01%	108.44%
15	Cerity Partners	New York, N.Y.	28,288	80,573.11	51.08%	-39.50%
16	Waverly Advisors	Birmingham, Ala.	4,200	8,313.80	50.86%	-4.20%
17	Courier Capital	Buffalo, N.Y.	2,222	2,862.98	50.84%	-42.84%
18	Lido Advisors	Los Angeles, Calif.	7,084	19,656.37	50.02%	-0.40%
19	Clearstead	Cleveland, Ohio	1,501	15,321.61	49.80%	14.17%
20	Vance Wealth	Santa Clarita, Calif.	348	670.81	49.49%	31.01%
21	Elser Financial Planning	Indianapolis, Ind.	375	2,060.45	49.32%	36.58%
22	Titleist Asset Management	San Antonio, Texas	1,772	1,401.80	45.94%	29.39%
23	Catalyst Financial Partners ††	Boston, Mass.	214	795.25	45.31%	-5.62%
24	Perigon Wealth Management	San Francisco, Calif.	3,744	6,940.95	43.69%	34.25%
25	Shuster Advisory Group	Pasadena, Calif.	308	6,284.27	43.37%	10.32%
26	F.L.Putnam Investment Management Co.	Lynnfield, Mass.	2,058	6,168.01	43.35%	16.53%
27	Choate Investment Advisors	Boston, Mass.	629	7,496.94	42.67%	-13.13%
28	Magnus Financial Group	New York, N.Y.	998	1,608.20	42.35%	0.84%
29	Mission Wealth Management	Santa Barbara, Calif.	2,943	7,072.96	42.15%	15.20%
30	Fairway Wealth Management	Independence, Ohio	275	2,347.11	42.04%	37.39%
31	Prosperity Capital Advisors	Westlake, Ohio	4,668	2,419.65	41.30%	17.93%
32	AE Wealth Management ‡	Topeka, Kan.	98,196	27,082.62	40.70%	21.68%
33	Fiducient Advisors	Chicago, Ill.	632	55,897.06	39.67%	41.00%
34	Pure Financial Advisors ‡	San Diego, Calif.	4,174	6,292.81	36.78%	16.27%
35	Van Hulzen Asset Management	El Dorado Hills, Calif.	2,463	1,993.82	36.11%	21.74%
36	Adams Wealth Advisors	Logan, Utah	685	603.49	35.99%	25.47%
37	SAX Wealth Advisors	Parsippany, N.J.	942	1,739.46	35.08%	31.06%
38	Callan Family Office	Radnor, Pa.	33	4,767.78	34.65%	91.77%
39	Wealthspire Advisors §	New York, N.Y.	9,119	25,269.23	34.61%	11.54%
40	Beacon Pointe Advisors	Newport Beach, Calif.	15,000	31,279.96	34.56%	25.59%
41	CW Advisors	Boston, Mass.	2,422	6,920.41	34.52%	26.19%
42	Clune & Associates	Chicago, Ill.	216	582.69	34.35%	25.64%
43	Creative Planning	Overland Park, Kan.	72,184	175,271.68	34.28%	17.76%
44	Carson Group	Omaha, Neb.	49,024	26,774.39	34.25%	22.81%
45	Robertson Stephens Wealth Management	San Francisco, Calif.	1,196	4,932.27	33.52%	16.10%
46	Mercer Advisors	Denver, Colo.	30,900	45,350.20	33.34%	22.98%
47	Abound Wealth Management	Franklin, Tenn.	663	1,065.31	33.15%	14.27%
48	Curi RMB Capital	Chicago, Ill.	2,568	8,474.06	33.01%	30.84%
49	PDS Planning	Dublin, Ohio	599	1,390.06	32.95%	32.06%
50	Evermay Wealth Management ‡	Arlington, Va.	512	1,062.57	32.90%	8.50%

§ AUM and client numbers are as of 12/31/23 for Wealthspire Advisors and its subsidiaries, separately registered investment advisors and subsidiary companies of NFP, an Aon company. ‡ AUM as of 3/24 as reported on latest ADV form. †† AUM as of 2/24 as reported on latest ADV form.

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FA's 2024 RIA RANKING

Commonwealth



2023 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2023 ASSETS (\$MM)*	% GROWTH IN ASSETS 2022-2023	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
ASSET CATEGORY: \$1 BILLION AND OVER							
1	CAPTRUST	Raleigh, N.C.	852,173.05	18.07%	26.78	-5.41%	24.83%
2	Edelman Financial Engines	Boston, Mass.	270,770.41	11.90%	0.21	13.62%	-1.52%
3	SageView Advisory Group	Newport Beach, Calif.	202,573.50	29.52%	44.42	25.04%	3.59%
4	Creative Planning	Overland Park, Kan.	175,271.68	34.28%	2.43	17.76%	14.03%
5	Corient ††	Miami, Fla.	155,700.00	17.07%	N/A	N/A	N/A
6	Hightower Advisors	Chicago, Ill.	130,239.34	23.77%	2.49	4.26%	18.71%
7	Mariner Wealth Advisors	Overland Park, Kan.	81,106.93	12.29%	2.03	2.32%	9.75%
8	Cerity Partners	New York, N.Y.	80,573.11	51.08%	2.85	-39.50%	149.74%
9	Fort Washington Investment Advisors	Cincinnati, Ohio	79,457.68	11.85%	146.87	6.68%	4.84%
10	Wealth Enhancement Advisory Services	Plymouth, Minn.	72,024.61	27.72%	1.20	5.89%	20.62%
11	CIBC Private Wealth, US	Atlanta, Ga.	57,308.55	12.14%	6.13	15.46%	-2.88%
12	Fiducient Advisors	Chicago, Ill.	55,897.06	39.67%	88.44	41.00%	-0.94%
13	Pathstone	Englewood, N.J.	48,013.14	93.32%	25.31	57.65%	22.62%
14	Mercer Advisors	Denver, Colo.	45,350.20	33.34%	1.47	22.98%	8.42%
15	Kayne Anderson Rudnick Investment Mgmt.	Los Angeles, Calif.	41,186.29	22.83%	1.47	16.72%	5.24%
16	Moneta	St. Louis, Mo.	37,481.64	22.28%	5.08	13.82%	7.43%
17	Silvercrest Asset Management Group	New York, N.Y.	33,280.64	15.14%	39.86	15.97%	-0.71%
18	Beacon Pointe Advisors	Newport Beach, Calif.	31,279.96	34.56%	2.09	25.59%	7.14%
19	AE Wealth Management †	Topeka, Kan.	27,082.62	40.70%	0.28	21.68%	15.63%
20	Buckingham Strategic Wealth	Saint Louis, Mo.	27,027.68	22.41%	1.92	16.08%	5.46%
21	Carson Group	Omaha, Neb.	26,774.39	34.25%	0.55	22.81%	9.32%
22	Wealthspire Advisors §	New York, N.Y.	25,269.23	34.61%	2.77	11.54%	20.69%
23	Savant Wealth Management	Rockford, Ill.	24,397.51	81.70%	1.50	7.40%	69.18%
24	Evoke Advisors**	Los Angeles, Calif.	23,665.26	-5.11%	28.11	-8.04%	3.19%
25	The Colony Group	Boston, Mass.	21,472.65	13.73%	3.10	11.32%	2.17%
26	1919 Investment Counsel	Baltimore, Md.	21,255.59	22.31%	5.80	3.38%	18.30%
27	Lido Advisors	Los Angeles, Calif.	19,656.37	50.02%	2.77	-0.40%	50.63%
28	Plante Moran Financial Advisors	Southfield, Mich.	19,432.09	16.06%	5.45	12.51%	3.16%
29	Allworth Financial	Folsom, Calif.	19,313.70	29.79%	0.84	10.04%	17.95%
30	MAI Capital Management	Cleveland, Ohio	19,251.36	22.05%	2.34	4.95%	16.30%
31	Johnson Investment Counsel	Cincinnati, Ohio	18,609.06	14.07%	3.79	9.38%	4.29%
32	Oxford Financial Group	Carmel, Ind.	18,201.05	16.76%	25.93	18.26%	-1.27%
33	Newport Capital Group	Red Bank, N.J.	16,521.22	12.65%	77.56	21.64%	-7.39%
34	Choreo †	Rockford, Ill.	16,030.87	31.51%	2.26	16.16%	13.21%
35	Clearstead	Cleveland, Ohio	15,321.61	49.80%	10.21	14.17%	31.21%
36	Homrich Berg	Atlanta, Ga.	15,199.30	21.32%	3.79	11.73%	8.58%
37	Aspiriant	Los Angeles, Calif.	14,659.63	13.03%	6.52	10.52%	2.27%
38	WE Family Offices	Coral Gables, Fla.	13,909.42	15.37%	128.79	13.23%	1.89%
39	myCIO Wealth Partners	Philadelphia, Pa.	12,968.14	8.00%	14.54	4.73%	3.12%
40	Appleton Partners	Boston, Mass.	12,842.31	5.79%	1.79	3.02%	2.69%
41	Modera Wealth Management	Westwood, N.J.	12,532.44	84.28%	2.20	-13.02%	111.85%
42	Evercore Wealth Management	New York, N.Y.	12,271.57	16.46%	17.00	15.82%	0.56%
43	Mason Investment Advisory Services	Reston, Va.	12,155.27	20.42%	12.34	15.16%	4.56%
44	IRA Group	Atlanta, Ga.	11,497.96	26.70%	39.38	10.21%	14.96%
45	Kovitz Investment Group Partners †	Chicago, Ill.	11,290.75	54.80%	4.64	42.01%	9.01%
46	Williams Jones Wealth Management	New York, N.Y.	10,568.31	13.33%	7.26	7.96%	4.98%
47	The Mather Group	Chicago, Ill.	10,508.54	20.53%	2.41	11.68%	7.92%
48	Gresham Partners	Chicago, Ill.	10,381.70	8.97%	87.98	11.74%	-2.48%
49	CV Advisors	Aventura, Fla.	9,678.32	15.01%	82.72	8.13%	6.36%

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

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50	Freestone Capital Management	Seattle, Wash.	9,527.80	15.89%	3.64	1.73%	13.93%
51	Valeo Financial Advisors	Carmel, Ind.	8,944.54	25.91%	4.22	10.35%	14.10%
52	Brookstone Capital Management	Wheaton, Ill.	8,842.57	17.68%	0.25	13.05%	4.09%
53	TAG Associates	New York, N.Y.	8,711.24	7.93%	79.19	7.93%	0.00%
54	Forum Financial Management	Lombard, Ill.	8,531.28	21.78%	1.61	15.07%	5.83%
55	Curi RMB Capital	Chicago, Ill.	8,474.06	33.01%	3.30	30.84%	1.66%
56	Bartlett Wealth Management	Cincinnati, Ohio	8,441.11	21.47%	3.59	21.16%	0.26%
57	Johnson Wealth	Milwaukee, Wis.	8,435.97	8.90%	3.35	-33.17%	62.95%
58	Ferguson Wellman Capital Management	Portland, Ore.	8,394.14	17.47%	8.48	11.90%	4.98%
59	Waverly Advisors	Birmingham, Ala.	8,313.80	50.86%	1.98	-4.20%	57.48%
60	Tolleson Private Wealth Management	Dallas, Texas	8,223.00	8.30%	40.31	12.01%	-3.32%
61	Summit Financial	Parsippany, N.J.	8,015.77	23.79%	1.34	-10.01%	37.56%
62	Welch & Forbes	Boston, Mass.	7,909.33	16.13%	12.26	45.30%	-20.07%
63	Conrad Siegel Investment Advisors	Harrisburg, Pa.	7,774.91	11.27%	16.44	2.33%	8.74%
64	Coldstream Wealth Management	Bellevue, Wash.	7,578.71	16.63%	3.46	39.37%	-16.32%
65	Choate Investment Advisors	Boston, Mass.	7,496.94	42.67%	11.92	-13.13%	64.23%
66	Advisors Capital Management	Ridgewood, N.J.	7,440.04	32.82%	0.59	10.38%	20.32%
67	Cornerstone Advisors Asset Management	Bethlehem, Pa.	7,416.50	11.73%	16.09	13.19%	-1.28%
68	Altair Advisors	Chicago, Ill.	7,386.49	22.82%	19.14	15.82%	6.04%
69	SignatureFD	Atlanta, Ga.	7,245.75	17.88%	4.09	12.15%	5.10%
70	Parallel Advisors	San Francisco, Calif.	7,076.38	23.97%	1.97	19.45%	3.79%
71	Mission Wealth Management	Santa Barbara, Calif.	7,072.96	42.15%	2.40	15.20%	23.40%
72	Cary Street Partners Financial §§	Richmond, Va.	6,977.34	26.57%	1.33	15.81%	9.29%
73	Perigon Wealth Management	San Francisco, Calif.	6,940.95	43.69%	1.85	34.25%	7.03%
74	Caprock	Boise, Idaho	6,921.60	16.92%	21.83	7.33%	8.93%
75	CW Advisors	Boston, Mass.	6,920.41	34.52%	2.86	26.19%	6.60%
76	Greenspring Advisors	Towson, Md.	6,896.37	14.94%	5.49	9.91%	4.58%
77	Joel Isaacson & Co.	New York, N.Y.	6,894.33	16.63%	5.66	15.86%	0.66%
78	Bradley, Foster & Sargent	Hartford, Conn.	6,848.52	21.67%	3.99	17.49%	3.56%
79	Heck Capital Advisors	Rhineland, Wis.	6,656.17	18.43%	5.41	11.40%	6.31%
80	Plancorp	St. Louis, Mo.	6,479.68	6.61%	4.24	8.42%	-1.67%
81	Axxcess Wealth Management	Carlsbad, Calif.	6,470.76	90.34%	0.60	-12.57%	117.70%
82	Pure Financial Advisors ‡	San Diego, Calif.	6,292.81	36.78%	1.51	16.27%	17.64%
83	Shuster Advisory Group	Pasadena, Calif.	6,284.27	43.37%	20.40	10.32%	29.96%
84	F.L.Putnam Investment Management Co.	Lynnfield, Mass.	6,168.01	43.35%	3.00	16.53%	23.01%
85	GYL Financial Synergies	West Hartford, Conn.	6,069.34	30.61%	2.98	-1.51%	32.62%
86	Bailard	Foster City, Calif.	5,810.26	14.30%	6.30	25.21%	-8.71%
87	Simon Quick Advisors	Morristown, N.J.	5,752.89	12.71%	7.62	5.40%	6.94%
88	Zhang Financial	Portage, Mich.	5,728.07	28.30%	2.97	18.52%	8.25%
89	WMS Partners	Towson, Md.	5,659.72	9.79%	12.15	9.32%	0.43%
90	Ingalls & Snyder	New York, N.Y.	5,595.89	17.62%	1.36	25.45%	-6.24%
91	HBKS Wealth Advisors	Erie, Pa.	5,570.27	11.59%	0.80	-9.55%	23.37%
92	JMG Financial Group	Downers Grove, Ill.	5,416.00	20.33%	3.49	12.74%	6.74%
93	Gradient Investments	Arden Hills, Minn.	5,268.16	20.39%	0.24	11.56%	7.92%
94	First Foundation Advisors	Irvine, Calif.	5,249.95	5.76%	3.14	-2.97%	9.00%
95	Iron Capital Advisors	Atlanta, Ga.	5,221.99	23.60%	30.54	25.04%	-1.16%
96	The Wealth Consulting Group	Las Vegas, Nev.	5,194.18	85.78%	0.39	2.09%	81.98%
97	Fort Pitt Capital Group	Pittsburgh, Pa.	5,156.03	19.83%	1.56	17.86%	1.66%
98	Badgley Phelps Wealth Managers	Seattle, Wash.	5,126.26	21.87%	4.94	7.42%	13.46%
99	Alesco Advisors	Pittsford, N.Y.	5,123.11	8.98%	9.80	4.40%	4.39%

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100	Cassaday & Company	McLean, Va.	4,975.02	23.33%	1.66	18.85%	3.77%
101	Index Fund Advisors	Irvine, Calif.	4,954.89	13.81%	2.04	15.22%	-1.22%
102	Truepoint Wealth Counsel	Cincinnati, Ohio	4,935.60	17.22%	2.72	13.21%	3.54%
103	Robertson Stephens Wealth Management	San Francisco, Calif.	4,932.27	33.52%	4.12	16.10%	15.00%
104	Miracle Mile Advisors	Los Angeles, Calif.	4,895.70	18.52%	2.60	12.93%	4.95%
105	Grimes & Company	Westborough, Mass.	4,850.37	16.10%	1.35	14.91%	1.04%
106	Baker Tilly Wealth Management	Madison, Wis.	4,800.23	22.71%	4.96	26.64%	-3.11%
107	Callan Family Office	Radnor, Pa.	4,767.78	34.65%	144.48	91.77%	-29.79%
108	Mayflower Advisors	Boston, Mass.	4,675.58	275.98%	4.88	212.40%	20.35%
109	Chicago Partners Wealth Advisors	Chicago, Ill.	4,592.82	19.96%	2.30	2.42%	17.13%
110	Klingenstein Fields Advisors	New York, N.Y.	4,590.01	6.39%	8.81	8.02%	-1.51%
111	Carnegie Investment Counsel	Pepper Pike, Ohio	4,519.65	30.24%	2.10	24.06%	4.98%
112	Allegheny Financial Group	Pittsburgh, Pa.	4,472.17	18.00%	1.24	6.92%	10.37%
113	PermCap Investment Office	Charleston, S.C.	4,462.88	6.42%	106.26	19.09%	-10.64%
114	Crescent Grove Advisors	Lake Forest, Ill.	4,455.15	13.86%	12.41	11.00%	2.57%
115	Bordeaux Wealth Advisors	Menlo Park, Calif.	4,437.47	10.75%	20.08	23.78%	-10.53%
116	Kovack Advisors	Fort Lauderdale, Fla.	4,287.82	17.45%	0.35	5.69%	11.13%
117	Linscomb Wealth	Houston, Texas	4,287.25	0.72%	2.44	8.74%	-7.38%
118	Moran Wealth Management	Naples, Fla.	4,266.89	5.29%	2.30	13.17%	-6.96%
119	Westmount Partners	Los Angeles, Calif.	4,259.36	19.46%	2.90	11.00%	7.61%
120	Hamilton Capital	Columbus, Ohio	4,219.86	12.29%	1.51	7.58%	4.38%
121	TCI Wealth Advisors	Tucson, Ariz.	4,091.67	19.24%	1.38	9.80%	8.59%
122	SYM Financial Advisors	Winona Lake, Ind.	4,055.39	21.77%	2.44	6.96%	13.85%
123	Finaccess Advisors	Miami, Fla.	4,047.02	-2.24%	40.07	1.63%	-3.81%
124	Adero Partners	Pleasanton, Calif.	4,035.67	19.52%	4.45	18.07%	1.23%
125	Brownson, Rehms & Foxworth	Chicago, Ill.	4,026.36	8.17%	15.73	7.75%	0.39%
126	Advance Capital Management	Southfield, Mich.	4,023.48	12.70%	0.58	9.49%	2.93%
127	Certuity	North Palm Beach, Fla.	3,961.77	8.79%	6.84	-14.51%	27.25%
128	TFO Wealth Partners	Maumee, Ohio	3,932.50	21.99%	1.69	-17.76%	48.34%
129	Constellation Wealth Advisors	Cincinnati, Ohio	3,900.16	27.99%	15.60	22.87%	4.17%
130	Clifford Swan Investment Counselors	Pasadena, Calif.	3,848.00	6.01%	4.12	7.26%	-1.17%
131	TFO Family Office Partners	Phoenix, Ariz.	3,824.06	14.48%	14.76	4.31%	9.75%
132	Mainstay Capital Management	Grand Blanc, Mich.	3,717.39	8.15%	1.04	14.34%	-5.42%
133	Heritage Investors Management Co. ‡	Bethesda, Md.	3,663.86	17.18%	4.81	10.55%	5.99%
134	Wharton Business Group	Malvern, Pa.	3,652.38	6.77%	30.44	12.10%	-4.76%
135	Foster Group	West Des Moines, Iowa	3,611.66	17.14%	1.86	10.57%	5.94%
136	Merriman Wealth Management	Seattle, Wash.	3,605.82	9.36%	1.55	11.43%	-1.86%
137	Retirement Planners of America	Plano, Texas	3,559.53	0.61%	0.54	1.56%	-0.94%
138	Chicago Capital	Chicago, Ill.	3,525.46	56.14%	5.17	35.08%	15.59%
139	Carlson Capital Management	Northfield, Minn.	3,502.69	17.02%	2.67	12.55%	3.97%
140	Sand Hill Global Advisors	Palo Alto, Calif.	3,443.77	13.36%	6.41	4.07%	8.92%
141	HoyleCohen Wealth Management	San Diego, Calif.	3,430.17	11.16%	1.99	-6.36%	18.70%
142	Bragg Financial Advisors	Charlotte, N.C.	3,423.86	22.34%	8.52	21.73%	0.50%
143	Matter Family Office	Saint Louis, Mo.	3,400.00	9.68%	25.00	4.84%	4.62%
144	JFS Wealth Advisors	Hermitage, Pa.	3,389.35	13.60%	1.58	12.11%	1.32%
145	Wescott Financial Advisory Group	Philadelphia, Pa.	3,384.00	6.75%	6.45	1.67%	5.00%
146	Accredited Investors Wealth Management	Edina, Minn.	3,359.36	13.63%	5.62	12.68%	0.84%
147	Schechter Investment Advisors	Birmingham, Mich.	3,349.37	17.64%	4.89	8.71%	8.21%
148	True North Advisors	Dallas, Texas	3,341.15	11.13%	13.64	3.42%	7.46%
149	Sowell Management	North Little Rock, Ark.	3,329.40	18.52%	0.33	4.23%	13.71%

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Commonwealth



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150	IFG Advisory	Atlanta, Ga.	3,252.39	28.42%	0.41	14.02%	12.63%
151	CM Wealth Advisors	Beachwood, Ohio	3,236.59	8.45%	15.71	3.71%	4.57%
152	Sage Financial Group	Conshohocken, Pa.	3,213.48	30.21%	3.22	23.68%	5.27%
153	Halbert Hargrove Global Advisors	Long Beach, Calif.	3,162.31	15.62%	3.72	9.49%	5.60%
154	GenTrust	Miami, Fla.	3,151.76	12.46%	10.72	4.43%	7.69%
155	Lake Street Advisors	Portsmouth, N.H.	3,108.81	7.63%	33.43	1.84%	5.68%
156	GM Advisory Group	Melville, N.Y.	3,046.09	21.13%	4.57	6.22%	14.04%
157	Henssler Financial	Kennesaw, Ga.	3,005.73	13.88%	1.72	1.39%	12.32%
158	MCF Advisors	Covington, Ky.	2,885.13	24.02%	2.97	11.01%	11.72%
159	Courier Capital	Buffalo, N.Y.	2,862.98	50.84%	1.29	-42.84%	163.90%
160	The Welch Group	Birmingham, Ala.	2,759.78	9.42%	2.06	-0.23%	9.67%
161	Gratus Capital	Atlanta, Ga.	2,744.84	30.52%	2.55	20.59%	8.23%
162	Larson Financial Group	Saint Louis, Mo.	2,744.80	17.51%	0.40	6.76%	10.07%
163	FAS Wealth Partners	Leawood, Kan.	2,696.82	25.11%	1.89	16.06%	7.79%
164	Donaldson Capital Management	Evansville, Ind.	2,677.44	15.87%	1.69	7.90%	7.38%
165	Morton Wealth	Calabasas, Calif.	2,645.04	11.24%	2.33	8.60%	2.43%
166	Schneider Downs Wealth Mgmt. Advisors	Pittsburgh, Pa.	2,614.78	20.22%	3.37	14.95%	4.58%
167	Bogart Wealth	McLean, Va.	2,613.81	17.92%	1.96	8.29%	8.89%
168	Anchor Capital Advisors	Boston, Mass.	2,613.55	-2.63%	2.47	0.60%	-3.20%
169	Wealthcare Capital Management	Richmond, Va.	2,579.94	-11.55%	0.56	-19.23%	9.50%
170	Marcum Wealth	Cleveland, Ohio	2,576.38	26.40%	0.86	13.76%	11.11%
171	Inspire Investing	Meridian, Idaho	2,562.23	26.12%	5.45	28.80%	-2.08%
172	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	2,556.15	21.09%	1.98	8.80%	11.29%
173	Capital Wealth Advisors	Naples, Fla.	2,531.72	16.24%	1.61	-1.62%	18.15%
174	MONTAG Wealth Management	Atlanta, Ga.	2,507.02	-0.30%	7.08	-1.71%	1.43%
175	Team Hewins	Redwood City, Calif.	2,501.85	15.10%	4.96	-2.26%	17.76%
176	Heritage Financial Services	Westwood, Mass.	2,499.71	29.46%	2.07	22.27%	5.89%
177	CoreCap Advisors	Southfield, Mich.	2,467.49	26.07%	0.28	3.62%	21.66%
178	Summitry	Foster City, Calif.	2,450.70	23.23%	2.18	23.67%	-0.35%
179	AlphaCore Wealth Advisory	San Diego, Calif.	2,441.97	63.07%	1.84	36.71%	19.28%
180	GHP Investment Advisors	Denver, Colo.	2,436.58	22.77%	2.18	14.20%	7.51%
181	Retirement Income Solutions	Ann Arbor, Mich.	2,421.76	12.86%	1.91	12.51%	0.32%
182	Prosperity Capital Advisors	Westlake, Ohio	2,419.65	41.30%	0.52	17.93%	19.82%
183	Chesley, Taft & Associates	Chicago, Ill.	2,403.80	16.73%	6.26	12.47%	3.78%
184	Birch Hill Investment Advisors	Boston, Mass.	2,389.32	15.73%	12.44	12.11%	3.23%
185	Credent Wealth Management	Auburn, Ind.	2,386.98	13.67%	0.88	11.06%	2.34%
186	CPS Investment Advisors	Lakeland, Fla.	2,353.43	18.37%	0.70	22.85%	-3.65%
187	Fairway Wealth Management	Independence, Ohio	2,347.11	42.04%	8.53	37.39%	3.38%
188	BLB&B Advisors	Montgomeryville, Pa.	2,298.18	22.31%	1.72	17.28%	4.29%
189	Lutz Financial	Omaha, Neb.	2,279.04	31.62%	2.82	21.52%	8.31%
190	Certified Advisory Corp.	Altamonte Springs, Fla.	2,272.75	18.25%	0.94	12.28%	5.32%
191	Foster & Motley	Cincinnati, Ohio	2,266.42	15.55%	2.77	12.16%	3.03%
192	McKinley Carter Wealth Services	Wheeling, W.Va.	2,260.99	18.69%	1.23	18.63%	0.05%
193	SFMG Wealth Advisors	Plano, Texas	2,248.72	19.30%	2.54	17.68%	1.37%
194	SJS Investment Services	Sylvania, Ohio	2,239.27	10.37%	2.47	9.39%	0.89%
195	Zemenick & Walker	St Louis, Mo.	2,234.38	14.05%	9.12	7.53%	6.06%
196	Parcion Private Wealth	Bellevue, Wash.	2,193.32	25.66%	7.67	10.72%	13.49%
197	Osborne Partners Capital Management	San Francisco, Calif.	2,169.81	8.58%	3.10	2.06%	6.39%
198	West Financial Services	McLean, Va.	2,162.44	13.89%	2.43	16.58%	-2.31%
199	Obermeyer Wood Investment Counsel	Aspen, Colo.	2,140.74	13.45%	3.57	3.99%	9.09%

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200	LWV Advisors	Pittsford, N.Y.	2,137.89	10.55%	4.38	5.80%	4.50%
201	RTD Financial Advisors	Philadelphia, Pa.	2,117.41	10.02%	3.14	8.39%	1.50%
202	CFS Investment Advisory Services	Totowa, N.J.	2,098.97	16.97%	3.75	14.88%	1.82%
203	Stokes Family Office	New Orleans, La.	2,096.97	21.07%	3.15	13.07%	7.07%
204	Guyasuta Investment Advisors	Pittsburgh, Pa.	2,074.13	14.30%	4.46	6.18%	7.64%
205	Elser Financial Planning	Indianapolis, Ind.	2,060.45	49.32%	5.49	36.58%	9.33%
206	Legacy Wealth Management	Memphis, Tenn.	2,053.16	15.45%	1.52	11.86%	3.21%
207	Glassman Wealth Services	Vienna, Va.	2,053.02	14.02%	5.87	4.25%	9.38%
208	Stonebridge Capital Advisors	Saint Paul, Minn.	2,033.81	15.53%	1.46	54.32%	-25.13%
209	Veris Wealth Partners	San Francisco, Calif.	2,018.91	12.61%	6.01	8.25%	4.02%
210	Van Hulzen Asset Management	El Dorado Hills, Calif.	1,993.82	36.11%	0.81	21.74%	11.80%
211	Main Street Research	Sausalito, Calif.	1,891.35	10.76%	2.14	8.38%	2.19%
212	ProVise Management Group	Clearwater, Fla.	1,877.34	16.14%	1.31	14.52%	1.41%
213	Boulay Financial Advisors †	Minneapolis, Minn.	1,868.74	-1.47%	1.63	3.70%	-4.99%
214	LBMC Investment Advisors	Brentwood, Tenn.	1,808.52	11.39%	3.68	10.48%	0.82%
215	Red Door Wealth Management	Memphis, Tenn.	1,791.41	24.09%	2.65	13.97%	8.87%
216	Fairview Capital Investment Management	Greenbrae, Calif.	1,754.90	13.88%	7.50	10.48%	3.08%
217	Cornerstone Advisory	Hunt Valley, Md.	1,741.87	14.90%	1.76	-8.17%	25.13%
218	SAX Wealth Advisors	Parsippany, N.J.	1,739.46	35.08%	1.85	31.06%	3.06%
219	California Financial Advisors	San Ramon, Calif.	1,739.37	16.74%	1.17	3.50%	12.79%
220	Sather Financial Group	Victoria, Texas	1,734.32	-1.70%	3.64	-2.94%	1.27%
221	Pinnacle Advisors	Mansfield, Ohio	1,728.53	7.40%	1.81	6.50%	0.84%
222	Condor Capital Wealth Management	Martinsville, N.J.	1,704.72	19.25%	2.13	7.77%	10.65%
223	Berger Financial Group	Plymouth, Minn.	1,700.00	21.43%	0.57	21.43%	0.00%
224	Abacus Planning Group	Columbia, S.C.	1,681.63	11.56%	5.72	13.83%	-2.00%
225	Beaird Harris Wealth Management	Dallas, Texas	1,674.19	9.95%	2.31	7.52%	2.26%
226	Ensemble Capital Management	San Francisco, Calif.	1,662.68	17.84%	5.62	24.21%	-5.13%
227	Magnus Financial Group	New York, N.Y.	1,608.20	42.35%	1.61	0.84%	41.16%
228	Narwhal Capital Management	Marietta, Ga.	1,583.45	15.75%	5.09	-10.67%	29.58%
229	Smith Anglin Financial	Dallas, Texas	1,571.43	26.21%	1.25	18.96%	6.09%
230	Diversified	Wilmington, Del.	1,553.77	20.48%	1.05	14.13%	5.56%
231	Diversified Portfolios	Bloomfield Hills, Mich.	1,546.54	23.38%	2.60	14.05%	8.18%
232	Austin Asset	Austin, Texas	1,539.33	21.63%	3.51	19.69%	1.62%
233	Patriot Investment Management Group	Knoxville, Tenn.	1,529.31	8.09%	0.91	22.17%	-11.52%
234	Traphagen Investment Advisors	Oradell, N.J.	1,528.33	32.67%	0.87	29.51%	2.44%
235	Aveo Capital Partners	Englewood, Colo.	1,513.25	15.11%	1.12	18.77%	-3.08%
236	Azzad Asset Management	Falls Church, Va.	1,492.42	21.74%	0.96	19.24%	2.09%
237	TrinityPoint Wealth	Milford, Conn.	1,416.98	15.69%	1.25	1.88%	13.55%
238	Woodmont Investment Counsel	Nashville, Tenn.	1,410.52	13.04%	3.36	10.08%	2.69%
239	Segment Wealth Management	Houston, Texas	1,410.13	20.36%	6.24	11.30%	8.13%
240	Titleist Asset Management	San Antonio, Texas	1,401.80	45.94%	0.79	29.39%	12.79%
241	Compound Planning	New York, N.Y.	1,395.95	224.78%	0.64	110.77%	54.09%
242	PDS Planning	Dublin, Ohio	1,390.06	32.95%	2.32	32.06%	0.67%
243	R W Investment Management	Eagle, Idaho	1,380.80	19.57%	1.76	22.16%	-2.12%
244	TFC Financial Management	Boston, Mass.	1,375.86	12.17%	3.49	7.33%	4.51%
245	Wealthstream Advisors	New York, N.Y.	1,347.24	25.32%	3.31	24.70%	0.49%
246	3EDGE Asset Management	Naples, Fla.	1,327.94	-0.36%	1.73	2.24%	-2.54%
247	Rebalance	Bethesda, Md.	1,312.75	113.45%	2.22	129.31%	-6.92%
248	Nottingham Advisors	Amherst, N.Y.	1,301.01	-7.33%	0.82	-7.03%	-0.32%
249	Valley National Advisers	Bethlehem, Pa.	1,297.64	14.91%	0.46	-7.75%	24.56%

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250	Blue Chip Partners	Farmington Hills, Mich.	1,279.74	21.65%	1.54	9.79%	10.80%
251	First Pacific Financial	Vancouver, Wash.	1,277.34	16.10%	1.15	13.17%	2.59%
252	BigSur Partners	Miami, Fla.	1,225.65	6.17%	53.29	-3.06%	9.52%
253	Delta Financial Group	Basking Ridge, N.J.	1,197.40	20.18%	1.46	9.32%	9.93%
254	Willis Johnson & Associates	Houston, Texas	1,167.58	30.57%	2.60	16.90%	11.69%
255	Regatta Capital Group	El Segundo, Calif.	1,162.61	24.82%	1.08	16.32%	7.31%
256	Benefit Financial Services Group	Irvine, Calif.	1,149.09	17.62%	1.39	12.35%	4.69%
257	Petersen Hastings Wealth Advisors	Kennewick, Wash.	1,123.54	21.19%	1.10	10.96%	9.22%
258	Straightline Group	Troy, Mich.	1,121.19	11.83%	0.45	8.97%	2.63%
259	CJM Wealth Advisers	Falls Church, Va.	1,117.62	1.12%	1.31	-2.19%	3.39%
260	RWW Wealth	Los Angeles, Calif.	1,113.38	15.86%	1.05	12.68%	2.82%
261	Janiczek Wealth Management	Denver, Colo.	1,109.94	17.97%	6.17	11.42%	5.88%
262	Retirement Investment Advisors	Oklahoma City, Okla.	1,109.66	19.34%	0.83	18.35%	0.83%
263	Isthmus Partners	Madison, Wis.	1,108.78	13.45%	3.20	10.17%	2.98%
264	Kowal Investment Group	Brookfield, Wis.	1,108.67	6.71%	0.80	8.02%	-1.22%
265	Halpern Financial	Ashburn, Va.	1,098.49	32.53%	3.43	26.32%	4.92%
266	Agili, P.C.	Richmond, Va.	1,096.21	12.72%	3.12	12.07%	0.57%
267	Lynx Investment Advisory	Washington, D.C.	1,081.79	1.33%	4.92	-2.36%	3.77%
268	Palisade Asset Management	Minneapolis, Minn.	1,069.27	5.64%	3.75	-2.52%	8.37%
269	Abound Wealth Management	Franklin, Tenn.	1,065.31	33.15%	1.61	14.27%	16.52%
270	Rollins Financial Advisors	Atlanta, Ga.	1,063.38	25.35%	1.09	26.51%	-0.92%
271	Evermay Wealth Management ‡	Arlington, Va.	1,062.57	32.90%	2.08	8.50%	22.49%
272	MJP Wealth Advisors	Farmington, Conn.	1,056.63	22.24%	1.30	16.24%	5.16%
273	Total Wealth Planning	Blue Ash, Ohio	1,055.36	21.87%	1.48	9.93%	10.85%
274	Pinkerton Retirement Specialists	Coeur d'Alene, Idaho	1,033.38	9.28%	1.28	6.42%	2.68%
275	Delegate Advisors	Chapel Hill, N.C.	1,032.24	14.38%	27.16	29.43%	-11.63%
276	Moisand Fitzgerald Tamayo	Orlando, Fla.	1,028.56	14.10%	1.21	4.34%	9.36%
277	REDW Wealth	Albuquerque, N.M.	1,004.65	12.08%	2.29	10.54%	1.39%
278	Lake Street Private Wealth	Chicago, Ill.	1,000.80	25.67%	1.77	20.77%	4.06%
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION							
279	Fermata Advisors	Sonoma, Calif.	973.85	32.71%	0.56	34.55%	-1.37%
280	Signet Financial Management	Parsippany, N.J.	949.40	13.07%	1.31	13.07%	0.00%
281	DiNuzzo Private Wealth	Beaver, Pa.	946.48	12.39%	1.17	13.64%	-1.10%
282	Verity Investment Partners	Beaufort, S.C.	938.78	11.75%	2.21	-1.14%	13.03%
283	Seasons of Advice Wealth Management	New York, N.Y.	931.81	18.06%	1.17	14.50%	3.10%
284	Rappaport Reiches Capital Management	Skokie, Ill.	928.00	21.47%	2.31	16.03%	4.69%
285	Financial Advisory Corporation	Grand Rapids, Mich.	913.27	14.77%	4.19	13.72%	0.93%
286	Buffington Mohr McNeal	Boise, Idaho	911.76	16.51%	1.47	10.68%	5.27%
287	SC&H Wealth	Sparks, Md.	908.92	23.25%	1.52	16.66%	5.64%
288	Hemington Wealth Management	Falls Church, Va.	894.45	4.16%	1.33	4.62%	-0.44%
289	Stage Harbor Financial	Needham, Mass.	876.60	13.08%	2.80	10.19%	2.62%
290	Yeske Buie	San Francisco, Calif.	873.02	13.72%	3.28	13.72%	0.00%
291	Southern Financial Group	Birmingham, Ala.	854.84	15.34%	0.77	28.64%	-10.34%
292	Chemistry Wealth Management	New York, N.Y.	846.84	22.16%	1.70	20.93%	1.01%
293	Mcllrath & Eck	Arlington, Wash.	839.59	29.29%	0.80	25.00%	3.43%
294	Opal Wealth Advisors	Jericho, N.Y.	825.86	30.45%	1.33	15.11%	13.32%
295	Falcon Wealth Planning	Ontario, Calif.	825.83	80.92%	0.58	-13.67%	109.57%
296	Glass Jacobson Investment Advisors	Owings Mills, Md.	817.31	6.13%	1.23	-0.59%	6.76%
297	Next Level Private	Harrison, N.Y.	810.71	26.00%	1.59	46.26%	-13.85%
298	J.W. Burns & Company	Dewitt, N.Y.	801.88	14.36%	1.37	5.37%	8.53%

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FA's 2024 RIA RANKING

Commonwealth



2023 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2023 ASSETS (\$MM)*	% GROWTH IN ASSETS 2022-2023	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
299	Richard P. Slaughter Associates	Austin, Texas	796.77	9.20%	1.77	1.92%	7.14%
300	Catalyst Financial Partners ††	Boston, Mass.	795.25	45.31%	3.72	-5.62%	53.96%
301	Fi3 Financial Advisors	Indianapolis, Ind.	791.67	20.46%	3.68	2.53%	17.49%
302	Insight Wealth Partners	Plano, Texas	789.96	14.80%	0.92	10.13%	4.24%
303	Financial Insights Wealth Management	Tacoma, Wash.	789.09	27.06%	1.04	27.39%	-0.26%
304	Christopher Weil & Company	San Diego, Calif.	781.98	-29.37%	1.48	-34.44%	7.72%
305	Blankinship & Foster	Solana Beach, Calif.	780.37	13.09%	2.57	13.09%	0.00%
306	Great Lakes Retirement	Sheffield Village, Ohio	776.91	24.32%	0.44	23.61%	0.57%
307	CapSouth Wealth Management	Dothan, Ala.	762.93	15.42%	1.82	21.47%	-4.98%
308	Omnia Family Wealth	Aventura, Fla.	759.72	5.21%	9.26	-2.49%	7.89%
309	William Mack & Associates	Troy, Mich.	754.78	16.23%	0.89	15.41%	0.71%
310	Sikich Financial	Springfield, Ill.	749.06	54.01%	1.00	108.44%	-26.11%
311	Shorepoint Capital Partners	Norwood, Mass.	736.23	56.32%	1.52	24.09%	25.97%
312	BlueSky Wealth Advisors ‡	New Bern, N.C.	730.18	19.23%	2.09	19.91%	-0.57%
313	Schnieders Capital Management	Pasadena, Calif.	725.04	-33.00%	2.79	-38.16%	8.33%
314	Spectrum Investment Advisors	Mequon, Wis.	724.82	22.79%	0.99	15.61%	6.21%
315	Frisch Financial Group	Melville, N.Y.	720.85	21.85%	1.36	18.87%	2.51%
316	MG&A Wealth	Plantation, Fla.	718.51	-29.90%	2.05	-34.91%	7.69%
317	Investmark Advisory Group	Shelton, Conn.	712.46	14.33%	1.15	12.48%	1.64%
318	Porter White Investment Advisors	Birmingham, Ala.	707.32	10.40%	5.75	5.02%	5.13%
319	AMI Investment Management	Kendallville, Ind.	705.32	7.41%	2.30	N/A	N/A
320	Briaud Financial Advisors	College Station, Texas	705.04	6.13%	2.61	8.89%	-2.53%
321	Leisure Capital Management	Costa Mesa, Calif.	703.94	-1.96%	2.17	-8.01%	6.58%
322	Keller Wealth Advisors	Victoria, Texas	703.89	15.96%	1.37	13.25%	2.39%
323	Goodman Financial Corporation	Houston, Texas	698.59	20.43%	2.76	18.05%	2.02%
324	Asset Management Group	Stamford, Conn.	695.51	17.73%	2.60	15.97%	1.52%
325	Klaas Financial Asset Advisors	Loves Park, Ill.	682.00	16.18%	0.66	21.60%	-4.46%
326	Droms Strauss Wealth Management	Saint Louis, Mo.	676.16	14.09%	1.96	29.64%	-11.99%
327	Vance Wealth	Santa Clarita, Calif.	670.81	49.49%	1.93	31.01%	14.10%
328	The L. Warner Companies	Timonium, Md.	657.43	8.49%	2.19	11.38%	-2.60%
329	High Net Worth Advisory Group	Naples, Fla.	648.68	12.03%	1.57	1.97%	9.87%
330	OPTAS Capital	Austin, Texas	633.67	15.59%	4.56	17.25%	-1.42%
331	Net Worth Advisory Group	Sandy, Utah	632.12	20.53%	0.86	15.95%	3.95%
332	Carolina Wealth Management	Greenville, N.C.	623.82	20.92%	1.11	12.32%	7.66%
333	Arista Wealth Management	Las Vegas, Nev.	621.20	12.93%	1.45	-5.05%	18.94%
334	Morling Financial Advisors	Fremont, Calif.	606.99	24.99%	1.78	24.26%	0.59%
335	Excalibur Management	Waltham, Mass.	606.40	12.10%	1.96	11.37%	0.65%
336	Adams Wealth Advisors	Logan, Utah	603.49	35.99%	0.88	25.47%	8.39%
337	Birchwood Financial Partners	Edina, Minn.	600.44	15.76%	0.97	14.45%	1.14%
338	Optima Asset Management	Dallas, Texas	599.04	8.99%	4.83	9.87%	-0.80%
339	Marotta Wealth Management	Charlottesville, Va.	591.21	12.66%	1.60	10.53%	1.93%
340	Clune & Associates	Chicago, Ill.	582.69	34.35%	2.70	25.64%	6.93%
341	NorthCape Wealth Management	Willimsville, N.Y.	565.61	14.77%	0.94	20.32%	-4.61%
342	Gradient Capital Advisors	San Diego, Calif.	546.42	19.53%	1.28	25.13%	-4.47%
343	Ballast	Lexington, Ky.	543.90	28.46%	1.29	17.44%	9.38%
344	Financial Management Strategies	Broadview Heights, Ohio	542.02	3.77%	0.53	N/A	N/A
345	Buckley Wealth Management	Las Vegas, Nev.	541.54	11.60%	2.42	9.61%	1.82%
346	Monument Group Wealth Advisors	Concord, Mass.	535.58	26.73%	3.19	9.38%	15.86%
347	J.W. Coons Advisors	Columbus, Ohio	533.80	6.21%	3.56	9.05%	-2.60%
348	Level Financial Advisors	East Amherst, N.Y.	529.56	-14.70%	0.86	-15.11%	0.49%

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FA's 2024 RIA RANKING

Commonwealth



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349	Meritas Wealth Management	Larkspur, Calif.	523.18	-6.67%	2.34	2.08%	-8.57%
350	Jentner Wealth Management	Akron, Ohio	522.58	8.63%	1.65	6.57%	1.94%
351	Manske Wealth Management	Houston, Texas	513.33	20.38%	1.17	11.56%	7.90%
352	Wilsey Asset Management	San Diego, Calif.	511.42	14.68%	0.54	7.82%	6.35%
353	Financial Alternatives	La Jolla, Calif.	507.03	10.47%	1.97	9.18%	1.18%
354	von Borstel & Associates	The Dalles, Ore.	504.44	12.17%	1.08	8.79%	3.10%
ASSET CATEGORY: \$250 MILLION TO < \$500 MILLION							
355	Pinnacle Financial Group	Western Springs, Ill.	499.75	18.56%	1.47	19.60%	-0.87%
356	Asio Capital	Lexington, Ky.	499.55	27.02%	2.01	15.75%	9.73%
357	Trinity Financial Advisors	Columbus, Ohio	487.33	22.09%	2.71	22.09%	0.00%
358	WJ Interests	Sugar Land, Texas	484.00	13.62%	2.16	8.54%	4.67%
359	Family Office Research	Bethesda, Md.	479.01	19.78%	5.32	37.08%	-12.62%
360	Transitions Wealth Management	Denver, Colo.	478.40	22.17%	1.08	8.32%	12.79%
361	Marshall Financial Group	Hunt Valley, Md.	468.81	23.27%	0.68	12.55%	9.52%
362	Sandbox Financial Partners	Bethesda, Md.	463.72	27.23%	1.43	7.66%	18.18%
363	Asset Planning	Cypress, Calif.	446.50	13.22%	1.14	11.77%	1.29%
364	Alpha Financial Advisors	Charlotte, N.C.	445.13	25.89%	1.78	20.35%	4.60%
365	ARQ Wealth Advisors	Scottsdale, Ariz.	443.57	12.17%	1.26	0.03%	12.14%
366	Fortitude Family Office	Scottsdale, Ariz.	434.33	121.20%	7.90	40.77%	57.14%
367	Monument Capital Management \$\$\$	Alexandria, Va.	433.82	8.51%	2.17	0.37%	8.11%
368	Dash Investments	Woodland Hills, Calif.	427.06	72.58%	1.17	41.37%	22.07%
369	Winch Financial	Appleton, Wis.	420.20	25.84%	0.52	33.52%	-5.76%
370	QP Consulting	Takoma Park, Md.	419.10	11.82%	5.99	2.24%	9.38%
371	ShoreHaven Wealth Partners	Red Bank, N.J.	418.10	15.68%	1.67	1.80%	13.64%
372	Allodium Investment Consultants	Minneapolis, Minn.	396.43	15.67%	1.64	14.23%	1.26%
373	Kercheville Advisors	San Antonio, Texas	394.56	13.48%	1.23	12.06%	1.27%
374	StrongBox Wealth	Lee's Summit, Mo.	394.04	18.02%	0.88	6.12%	11.22%
375	Jackson Square Capital	San Francisco, Calif.	393.69	24.42%	3.03	7.20%	16.07%
376	WealthCrest Financial Services	Springfield, Va.	386.90	25.91%	1.11	13.32%	11.11%
377	Searcy Financial Services	Overland Park, Kan.	377.86	12.98%	2.13	14.90%	-1.67%
378	McCarthy Asset Management	Redwood Shores, Calif.	366.20	12.28%	1.66	11.27%	0.91%
379	Samalin Wealth	Chappaqua, N.Y.	364.52	20.22%	0.73	17.32%	2.47%
380	R.W. Rogé & Company	Bohemia, N.Y.	336.00	16.67%	1.11	12.82%	3.41%
381	Sard Wealth Management Group	Atlanta, Ga.	334.90	15.54%	1.15	9.59%	5.43%
382	Elite Retirement Planning	Grimes, Iowa	334.80	49.63%	0.39	34.67%	11.11%
383	Baron Financial Group	Fair Lawn, N.J.	331.78	10.35%	1.07	13.57%	-2.83%
384	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	322.59	17.41%	0.88	19.96%	-2.13%
385	Legacy CG dba Legacy Consulting Group	Plano, Texas	316.58	17.59%	2.17	19.20%	-1.35%
386	Navigoe	Redondo Beach, Calif.	316.56	11.70%	2.34	15.83%	-3.57%
387	Fortune Wealth Management	Dallas, Texas	306.00	15.66%	1.42	12.97%	2.38%
388	Sebold Capital Management	Lisle, Ill.	303.81	17.43%	2.81	12.00%	4.85%
389	Hurley Financial Group	Corvallis, Ore.	301.56	30.33%	0.65	34.27%	-2.94%
390	Sharper & Granite	El Segundo, Calif.	299.86	33.61%	2.38	11.34%	20.00%
391	Veripax Wealth Management	Folsom, Calif.	289.70	25.70%	0.97	16.42%	7.97%
392	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	287.24	14.33%	1.76	15.03%	-0.61%
393	Canter Wealth	La Jolla, Calif.	286.61	39.76%	1.03	20.22%	16.25%
394	FSA Advisors	Troy, Mich.	284.60	33.90%	0.22	51.85%	-11.82%
395	Integrated Capital Management	Bloomfield Hills, Mich.	283.16	34.09%	0.69	26.53%	5.97%
396	Life Planning Partners	Jacksonville, Fla.	273.80	17.98%	3.01	23.17%	-4.21%
397	Centerline Wealth Advisors	Louisville, Ky.	261.00	25.59%	0.92	21.19%	3.64%

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398	Foresight Capital Management Advisors	Saline, Mich.	253.54	19.35%	0.50	16.77%	2.21%
ASSET CATEGORY: \$150 MILLION TO < \$250 MILLION							
399	Kemp Financial Management	Fullerton, Calif.	230.00	13.46%	1.44	6.36%	6.67%
400	Pearson Creek Capital Management	Chicago, Ill.	225.00	-18.77%	14.06	-23.85%	6.67%
401	Kotys Wealth Professionals	Valparaiso, Ind.	223.43	18.22%	0.83	17.78%	0.37%
402	Byrne Asset Management	Kingston, N.J.	210.87	16.31%	1.42	13.19%	2.76%
403	Charleston Financial Advisors	Charleston, S.C.	210.71	13.33%	1.00	11.19%	1.93%
404	TABR Capital Management	Orange, Calif.	203.44	11.60%	0.87	14.45%	-2.49%
405	RHS Financial	San Francisco, Calif.	198.11	19.82%	1.23	16.10%	3.21%
406	Gold Medal Waters ‡	Boulder, Colo.	193.62	24.96%	1.36	23.20%	1.43%
407	Center For Asset Management	Palm Beach Gardens, Fla.	193.34	10.83%	0.86	0.53%	10.24%
408	Atwater Wealth Management	Boston, Mass.	192.66	9.33%	1.95	-2.81%	12.50%
409	Professional Financial Strategies	Pittsford, N.Y.	191.54	7.05%	1.82	10.11%	-2.78%
410	Westview Investment Advisors	Burlington, Vt.	180.46	14.68%	1.19	10.15%	4.11%
411	Elderado Financial	Montrose, Colo.	172.27	21.28%	0.46	11.28%	8.99%
412	Aldebaran Financial Insights	Kingsport, Tenn.	172.00	-22.66%	0.69	-7.19%	-16.67%
413	Lighthouse Wealth Management	Ashland, Ohio	170.42	11.51%	0.48	14.01%	-2.20%
414	Purtill Financial	Highland Heights, Ohio	166.49	5.80%	0.97	7.03%	-1.15%
415	Smith Bruer Advisors	Tallahassee, Fla.	159.60	8.92%	0.62	4.26%	4.47%
416	Paragon Wealth Management	Provo, Utah	156.42	14.53%	0.97	10.99%	3.18%
ASSET CATEGORY: < \$150 MILLION							
417	Ivy League Financial Advisors	Rockville, Md.	133.84	16.33%	1.49	22.80%	-5.26%
418	Steward Advisors	Chicago, Ill.	132.45	15.22%	1.34	18.71%	-2.94%
419	Strada Wealth Management	Austin, Texas	105.00	40.00%	3.50	-30.00%	100.00%
420	Meritas Advisors	San Rafael, Calif.	100.61	39.30%	2.05	44.98%	-3.92%
421	MTR Financial Services	Kingwood, Texas	97.74	21.08%	0.93	-19.28%	50.00%
422	Chilmark Financial Advisors	Miami, Fla.	84.83	12.77%	1.54	14.83%	-1.79%
423	The Leonard Financial Group	Riverside, Calif.	39.13	13.48%	0.51	0.21%	13.24%
424	Safe Harbor Asset Management	Huntington, N.Y.	34.73	1.18%	1.09	-1.98%	3.23%
425	Venn Wealth & Benefit Services	Altoona, Pa.	22.21	29.20%	0.17	15.98%	11.40%
426	Birch Investment Management	Brookings, S.D.	19.78	8.54%	0.33	-9.55%	20.00%
427	Aurora Strategic Advisors	Lumberton, N.C.	15.00	-3.23%	0.03	-10.39%	8.00%
428	Old Oak Advisors	Vestavia Hills, Ala.	13.21	57.09%	0.35	15.75%	35.71%
429	Atherean Wealth Management	Jersey City, N.J.	7.49	7.85%	0.30	16.48%	-7.41%
430	Carthage Financial Group	Braintree, Mass.	5.00	11.11%	0.05	8.89%	2.04%
431	Destiny Wealth Partners	Tavares, Fla.	1.10	18.01%	0.00	20.54%	-2.10%

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RIA Discretionary & Non-Discretionary AUM Ranking

2023 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2023 (\$MM)	NON-DISCRETIONARY ASSETS 2023 (\$MM)	YEAR END 2023 ASSETS (\$MM)*
ASSET CATEGORY: \$1 BILLION AND OVER					
1	CAPTRUST	Raleigh, N.C.	162,348.14	689,824.92	852,173.05
2	Edelman Financial Engines	Boston, Mass.	270,770.41	0.00	270,770.41
3	SageView Advisory Group	Newport Beach, Calif.	21,524.11	181,049.39	202,573.50
4	Creative Planning	Overland Park, Kan.	172,319.36	2,952.32	175,271.68
5	Corient ††	Miami, Fla.	N/A	N/A	155,700.00
6	Hightower Advisors	Chicago, Ill.	122,850.56	7,388.78	130,239.34
7	Mariner Wealth Advisors	Overland Park, Kan.	75,035.94	6,070.99	81,106.93
8	Cerity Partners	New York, N.Y.	64,642.50	15,930.61	80,573.11
9	Fort Washington Investment Advisors	Cincinnati, Ohio	79,206.90	250.78	79,457.68
10	Wealth Enhancement Advisory Services	Plymouth, Minn.	68,865.56	3,159.05	72,024.61
11	CIBC Private Wealth, US	Atlanta, Ga.	55,360.78	1,947.77	57,308.55
12	Fiducient Advisors	Chicago, Ill.	26,724.12	29,172.94	55,897.06
13	Pathstone	Englewood, N.J.	37,839.66	10,173.48	48,013.14
14	Mercer Advisors	Denver, Colo.	44,448.97	901.23	45,350.20
15	Kayne Anderson Rudnick Investment Mgmt.	Los Angeles, Calif.	41,186.29	0.00	41,186.29
16	Moneta	St. Louis, Mo.	28,346.17	9,135.47	37,481.64
17	Silvercrest Asset Management Group	New York, N.Y.	21,885.13	11,395.51	33,280.64
18	Beacon Pointe Advisors	Newport Beach, Calif.	28,646.48	2,633.48	31,279.96
19	AE Wealth Management ‡	Topeka, Kan.	27,082.62	0.00	27,082.62
20	Buckingham Strategic Wealth	Saint Louis, Mo.	25,466.27	1,561.41	27,027.68
21	Carson Group	Omaha, Neb.	26,750.10	24.29	26,774.39
22	Wealthspire Advisors §	New York, N.Y.	N/A	N/A	25,269.23
23	Savant Wealth Management	Rockford, Ill.	24,250.97	146.54	24,397.51
24	Evoke Advisors**	Los Angeles, Calif.	9,550.58	14,114.67	23,665.26
25	The Colony Group	Boston, Mass.	19,058.99	2,413.66	21,472.65
26	1919 Investment Counsel	Baltimore, Md.	21,188.38	67.21	21,255.59
27	Lido Advisors	Los Angeles, Calif.	19,205.26	451.10	19,656.37
28	Plante Moran Financial Advisors	Southfield, Mich.	8,492.67	10,939.42	19,432.09
29	Allworth Financial	Folsom, Calif.	18,601.57	712.12	19,313.70
30	MAI Capital Management	Cleveland, Ohio	17,378.73	1,872.64	19,251.36
31	Johnson Investment Counsel	Cincinnati, Ohio	18,383.48	225.58	18,609.06
32	Oxford Financial Group	Carmel, Ind.	7,788.53	10,412.52	18,201.05
33	Newport Capital Group	Red Bank, N.J.	319.87	16,201.34	16,521.22
34	Choreo ‡	Rockford, Ill.	15,081.30	949.57	16,030.87
35	Clearstead	Cleveland, Ohio	9,596.03	5,725.58	15,321.61
36	Homrich Berg	Atlanta, Ga.	13,470.69	1,728.62	15,199.30
37	Aspiriant	Los Angeles, Calif.	12,119.59	2,540.04	14,659.63
38	WE Family Offices	Coral Gables, Fla.	0.00	13,909.42	13,909.42
39	myCIO Wealth Partners	Philadelphia, Pa.	507.50	12,460.64	12,968.14
40	Appleton Partners	Boston, Mass.	12,842.31	0.00	12,842.31
41	Modera Wealth Management	Westwood, N.J.	12,185.59	346.86	12,532.44
42	Evercore Wealth Management	New York, N.Y.	12,197.94	73.63	12,271.57
43	Mason Investment Advisory Services	Reston, Va.	11,541.60	613.67	12,155.27
44	IRA Group	Atlanta, Ga.	679.91	10,818.05	11,497.96
45	Kovitz Investment Group Partners ‡	Chicago, Ill.	10,640.87	649.88	11,290.75
46	Williams Jones Wealth Management	New York, N.Y.	10,491.13	77.19	10,568.31
47	The Mather Group	Chicago, Ill.	9,314.64	1,193.90	10,508.54
48	Gresham Partners	Chicago, Ill.	6,979.77	3,401.93	10,381.70

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RIA Discretionary & Non-Discretionary AUM Ranking

2023 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2023 (\$MM)	NON-DISCRETIONARY ASSETS 2023 (\$MM)	YEAR END 2023 ASSETS (\$MM)*
49	CV Advisors	Aventura, Fla.	734.65	8,943.66	9,678.32
50	Freestone Capital Management	Seattle, Wash.	6,758.27	2,769.53	9,527.80
51	Valeo Financial Advisors	Carmel, Ind.	6,976.62	1,967.92	8,944.54
52	Brookstone Capital Management	Wheaton, Ill.	8,842.57	0.00	8,842.57
53	TAG Associates	New York, N.Y.	337.79	8,373.44	8,711.24
54	Forum Financial Management	Lombard, Ill.	8,447.12	84.16	8,531.28
55	Curi RMB Capital	Chicago, Ill.	7,979.78	494.27	8,474.06
56	Bartlett Wealth Management	Cincinnati, Ohio	8,402.76	38.35	8,441.11
57	Johnson Wealth	Milwaukee, Wis.	6,777.18	1,658.79	8,435.97
58	Ferguson Wellman Capital Management	Portland, Ore.	8,394.14	0.00	8,394.14
59	Waverly Advisors	Birmingham, Ala.	8,121.35	192.45	8,313.80
60	Tolleson Private Wealth Management	Dallas, Texas	8,021.00	202.00	8,223.00
61	Summit Financial	Parsippany, N.J.	3,269.29	4,746.48	8,015.77
62	Welch & Forbes	Boston, Mass.	7,676.78	232.55	7,909.33
63	Conrad Siegel Investment Advisors	Harrisburg, Pa.	2,597.81	5,177.10	7,774.91
64	Coldstream Wealth Management	Bellevue, Wash.	7,328.39	250.32	7,578.71
65	Choate Investment Advisors	Boston, Mass.	6,720.52	776.42	7,496.94
66	Advisors Capital Management	Ridgewood, N.J.	7,440.04	0.00	7,440.04
67	Cornerstone Advisors Asset Management	Bethlehem, Pa.	3,792.15	3,624.36	7,416.50
68	Altair Advisors	Chicago, Ill.	3,162.89	4,223.60	7,386.49
69	SignatureFD	Atlanta, Ga.	6,570.30	675.45	7,245.75
70	Parallel Advisors	San Francisco, Calif.	7,072.82	3.56	7,076.38
71	Mission Wealth Management	Santa Barbara, Calif.	5,662.06	1,410.90	7,072.96
72	Cary Street Partners Financial §§	Richmond, Va.	4,764.30	2,213.04	6,977.34
73	Perigon Wealth Management	San Francisco, Calif.	5,112.12	1,828.83	6,940.95
74	Caprock	Boise, Idaho	6,670.34	251.25	6,921.60
75	CW Advisors	Boston, Mass.	6,842.25	78.17	6,920.41
76	Greenspring Advisors	Towson, Md.	2,914.75	3,981.62	6,896.37
77	Joel Isaacson & Co.	New York, N.Y.	4,344.07	2,550.26	6,894.33
78	Bradley, Foster & Sargent	Hartford, Conn.	6,845.63	2.89	6,848.52
79	Heck Capital Advisors	Rhineland, Wis.	1,577.51	5,078.66	6,656.17
80	Plancorp	St. Louis, Mo.	6,085.36	394.32	6,479.68
81	Axxcess Wealth Management	Carlsbad, Calif.	5,371.23	1,099.53	6,470.76
82	Pure Financial Advisors ‡	San Diego, Calif.	6,194.70	98.11	6,292.81
83	Shuster Advisory Group	Pasadena, Calif.	6,214.12	70.15	6,284.27
84	F.L.Putnam Investment Management Co.	Lynnfield, Mass.	6,117.82	50.19	6,168.01
85	GYL Financial Synergies	West Hartford, Conn.	4,357.51	1,711.83	6,069.34
86	Bailard	Foster City, Calif.	5,794.17	16.09	5,810.26
87	Simon Quick Advisors	Morristown, N.J.	5,271.47	481.42	5,752.89
88	Zhang Financial	Portage, Mich.	3,624.71	2,103.36	5,728.07
89	WMS Partners	Towson, Md.	3,281.52	2,378.20	5,659.72
90	Ingalls & Snyder	New York, N.Y.	5,444.16	151.73	5,595.89
91	HBKS Wealth Advisors	Erie, Pa.	5,486.08	84.19	5,570.27
92	JMG Financial Group	Downers Grove, Ill.	5,211.00	205.00	5,416.00
93	Gradient Investments	Arden Hills, Minn.	5,268.16	0.00	5,268.16
94	First Foundation Advisors	IRvine, Calif.	5,157.63	92.32	5,249.95
95	Iron Capital Advisors	Atlanta, Ga.	5,128.01	93.98	5,221.99
96	The Wealth Consulting Group	Las Vegas, Nev.	5,193.42	0.76	5,194.18
97	Fort Pitt Capital Group	Pittsburgh, Pa.	5,146.23	9.80	5,156.03

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

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98	Badgley Phelps Wealth Managers	Seattle, Wash.	4,770.72	355.54	5,126.26
99	Alesco Advisors	Pittsford, N.Y.	4,329.05	794.06	5,123.11
100	Cassaday & Company	McLean, Va.	4,975.02	0.00	4,975.02
101	Index Fund Advisors	Irvine, Calif.	4,954.89	0.00	4,954.89
102	Truepoint Wealth Counsel	Cincinnati, Ohio	4,894.30	41.30	4,935.60
103	Robertson Stephens Wealth Management	San Francisco, Calif.	3,823.18	1,109.09	4,932.27
104	Miracle Mile Advisors	Los Angeles, Calif.	4,895.70	0.00	4,895.70
105	Grimes & Company	Westborough, Mass.	4,755.15	95.22	4,850.37
106	Baker Tilly Wealth Management	Madison, Wis.	2,847.16	1,953.08	4,800.23
107	Callan Family Office	Radnor, Pa.	4,121.01	646.78	4,767.78
108	Mayflower Advisors	Boston, Mass.	1,147.31	3,528.27	4,675.58
109	Chicago Partners Wealth Advisors	Chicago, Ill.	4,183.07	409.75	4,592.82
110	Klengenstein Fields Advisors	New York, N.Y.	3,890.41	699.60	4,590.01
111	Carnegie Investment Counsel	Pepper Pike, Ohio	4,120.36	399.29	4,519.65
112	Allegheny Financial Group	Pittsburgh, Pa.	4,345.47	126.70	4,472.17
113	PermCap Investment Office	Charleston, S.C.	2,591.08	1,871.81	4,462.88
114	Crescent Grove Advisors	Lake Forest, Ill.	4,416.54	38.61	4,455.15
115	Bordeaux Wealth Advisors	Menlo Park, Calif.	3,680.12	757.35	4,437.47
116	Kovack Advisors	Fort Lauderdale, Fla.	3,523.02	764.81	4,287.82
117	Linscomb Wealth	Houston, Texas	4,285.54	1.70	4,287.25
118	Moran Wealth Management	Naples, Fla.	3,344.88	922.00	4,266.89
119	Westmount Partners	Los Angeles, Calif.	4,215.56	43.80	4,259.36
120	Hamilton Capital	Columbus, Ohio	4,072.84	147.02	4,219.86
121	TCI Wealth Advisors	Tucson, Ariz.	4,074.74	16.93	4,091.67
122	SYM Financial Advisors	Winona Lake, Ind.	3,443.16	612.23	4,055.39
123	Finaccess Advisors	Miami, Fla.	0.00	4,047.02	4,047.02
124	Adero Partners	Pleasanton, Calif.	4,008.67	27.00	4,035.67
125	Brownson, Rehms & Foxworth	Chicago, Ill.	0.00	4,026.36	4,026.36
126	Advance Capital Management	Southfield, Mich.	3,900.06	123.42	4,023.48
127	Certuity	North Palm Beach, Fla.	2,823.65	1,138.11	3,961.77
128	TFO Wealth Partners	Maumee, Ohio	3,906.78	25.71	3,932.50
129	Constellation Wealth Advisors	Cincinnati, Ohio	2,192.68	1,707.48	3,900.16
130	Clifford Swan Investment Counselors	Pasadena, Calif.	3,329.00	519.00	3,848.00
131	TFO Family Office Partners	Phoenix, Ariz.	3,810.70	13.36	3,824.06
132	Mainstay Capital Management	Grand Blanc, Mich.	3,379.38	338.02	3,717.39
133	Heritage Investors Management Corporation ‡	Bethesda, Md.	3,651.82	12.04	3,663.86
134	Wharton Business Group	Malvern, Pa.	3,333.27	319.11	3,652.38
135	Foster Group	West Des Moines, Iowa	3,442.18	169.47	3,611.66
136	Merriman Wealth Management	Seattle, Wash.	3,605.82	0.00	3,605.82
137	Retirement Planners of America	Plano, Texas	3,519.56	39.97	3,559.53
138	Chicago Capital	Chicago, Ill.	3,513.22	12.24	3,525.46
139	Carlson Capital Management	Northfield, Minn.	3,485.16	17.53	3,502.69
140	Sand Hill Global Advisors	Palo Alto, Calif.	3,425.25	18.52	3,443.77
141	HoyleCohen Wealth Management	San Diego, Calif.	3,412.73	17.44	3,430.17
142	Bragg Financial Advisors	Charlotte, N.C.	3,423.86	0.00	3,423.86
143	Matter Family Office	Saint Louis, Mo.	0.00	3,400.00	3,400.00
144	JFS Wealth Advisors	Hermitage, Pa.	2,940.39	448.96	3,389.35
145	Wescott Financial Advisory Group	Philadelphia, Pa.	2,551.00	833.00	3,384.00
146	Accredited Investors Wealth Management	Edina, Minn.	3,122.10	237.26	3,359.36

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147	Schechter Investment Advisors	Birmingham, Mich.	2,869.52	479.84	3,349.37
148	True North Advisors	Dallas, Texas	3,317.71	23.44	3,341.15
149	Sowell Management	North Little Rock, Ark.	3,328.99	0.41	3,329.40
150	IFG Advisory	Atlanta, Ga.	3,055.78	196.61	3,252.39
151	CM Wealth Advisors	Beachwood, Ohio	3,094.71	141.89	3,236.59
152	Sage Financial Group	Conshohocken, Pa.	2,932.56	280.92	3,213.48
153	Halbert Hargrove Global Advisors	Long Beach, Calif.	3,010.66	151.66	3,162.31
154	GenTrust	Miami, Fla.	2,728.42	423.34	3,151.76
155	Lake Street Advisors	Portsmouth, N.H.	1,262.53	1,846.29	3,108.81
156	GM Advisory Group	Melville, N.Y.	2,059.34	986.75	3,046.09
157	Henssler Financial	Kennesaw, Ga.	2,444.89	560.84	3,005.73
158	MCF Advisors	Covington, Ky.	1,994.11	891.01	2,885.13
159	Courier Capital	Buffalo, N.Y.	2,862.98	0.00	2,862.98
160	The Welch Group	Birmingham, Ala.	2,759.78	0.00	2,759.78
161	Gratus Capital	Atlanta, Ga.	2,694.54	50.30	2,744.84
162	Larson Financial Group	Saint Louis, Mo.	2,276.00	468.80	2,744.80
163	FAS Wealth Partners	Leawood, Kan.	2,651.82	45.00	2,696.82
164	Donaldson Capital Management	Evansville, Ind.	2,677.44	0.00	2,677.44
165	Morton Wealth	Calabasas, Calif.	2,623.14	21.90	2,645.04
166	Schneider Downs Wealth Management Advisors	Pittsburgh, Pa.	1,672.28	942.50	2,614.78
167	Bogart Wealth	McLean, Va.	1,819.63	794.19	2,613.81
168	Anchor Capital Advisors	Boston, Mass.	2,613.55	0.00	2,613.55
169	Wealthcare Capital Management	Richmond, Va.	2,539.04	40.90	2,579.94
170	Marcum Wealth	Cleveland, Ohio	2,525.12	51.27	2,576.38
171	Inspire Investing	Meridian, Idaho	2,562.23	0.00	2,562.23
172	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	2,472.85	83.30	2,556.15
173	Capital Wealth Advisors	Naples, Fla.	2,386.64	145.08	2,531.72
174	MONTAG Wealth Management	Atlanta, Ga.	2,491.38	15.64	2,507.02
175	Team Hewins	Redwood City, Calif.	1,463.13	1,038.73	2,501.85
176	Heritage Financial Services	Westwood, Mass.	2,499.71	0.00	2,499.71
177	CoreCap Advisors	Southfield, Mich.	2,467.49	0.00	2,467.49
178	Summitry	Foster City, Calif.	2,285.81	164.90	2,450.70
179	AlphaCore Wealth Advisory	San Diego, Calif.	1,930.12	511.85	2,441.97
180	GHP Investment Advisors	Denver, Colo.	2,368.22	68.36	2,436.58
181	Retirement Income Solutions	Ann Arbor, Mich.	2,421.76	0.00	2,421.76
182	Prosperity Capital Advisors	Westlake, Ohio	2,245.31	174.34	2,419.65
183	Chesley, Taft & Associates	Chicago, Ill.	2,225.57	178.22	2,403.80
184	Birch Hill Investment Advisors	Boston, Mass.	2,389.32	0.00	2,389.32
185	Credent Wealth Management	Auburn, Ind.	2,386.98	0.00	2,386.98
186	CPS Investment Advisors	Lakeland, Fla.	2,353.43	0.00	2,353.43
187	Fairway Wealth Management	Independence, Ohio	926.12	1,420.99	2,347.11
188	BLB&B Advisors	Montgomeryville, Pa.	2,250.13	48.05	2,298.18
189	Lutz Financial	Omaha, Neb.	2,021.73	257.31	2,279.04
190	Certified Advisory Corp	Altamonte Springs, Fla.	2,272.75	0.00	2,272.75
191	Foster & Motley	Cincinnati, Ohio	2,211.79	54.63	2,266.42
192	McKinley Carter Wealth Services	Wheeling, W.Va.	2,142.67	118.33	2,260.99
193	SFMG Wealth Advisors	Plano, Texas	2,056.49	192.23	2,248.72
194	SJS Investment Services	Sylvania, Ohio	2,239.27	0.00	2,239.27
195	Zemenick & Walker	St Louis, Mo.	0.00	2,234.38	2,234.38

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196	Parcior Private Wealth	Bellevue, Wash.	2,193.32	0.00	2,193.32
197	Osborne Partners Capital Management	San Francisco, Calif.	2,124.12	45.69	2,169.81
198	West Financial Services	McLean, Va.	2,148.38	14.06	2,162.44
199	Obermeyer Wood Investment Counsel	Aspen, Colo.	2,140.74	0.00	2,140.74
200	LWV Advisors	Pittsford, N.Y.	1,585.01	552.87	2,137.89
201	RTD Financial Advisors	Philadelphia, Pa.	2,062.95	54.47	2,117.41
202	CFS Investment Advisory Services	Totowa, N.J.	1,330.14	768.83	2,098.97
203	Stokes Family Office	New Orleans, La.	1,873.80	223.17	2,096.97
204	Guyasuta Investment Advisors	Pittsburgh, Pa.	2,074.13	0.00	2,074.13
205	Elser Financial Planning	Indianapolis, Ind.	842.89	1,217.57	2,060.45
206	Legacy Wealth Management	Memphis, Tenn.	1,955.99	97.17	2,053.16
207	Glassman Wealth Services	Vienna, Va.	1,915.44	137.58	2,053.02
208	Stonebridge Capital Advisors	Saint Paul, Minn.	1,966.41	67.40	2,033.81
209	Veris Wealth Partners	San Francisco, Calif.	1,856.14	162.77	2,018.91
210	Van Hulzen Asset Management	El Dorado Hills, Calif.	1,983.12	10.70	1,993.82
211	Main Street Research	Sausalito, Calif.	1,891.35	0.00	1,891.35
212	ProVise Management Group	Clearwater, Fla.	1,865.73	11.61	1,877.34
213	Boulay Financial Advisors †	Minneapolis, Minn.	1,703.33	165.41	1,868.74
214	LBMC Investment Advisors	Brentwood, Tenn.	1,808.52	0.00	1,808.52
215	Red Door Wealth Management	Memphis, Tenn.	1,377.62	413.79	1,791.41
216	Fairview Capital Investment Management	Greenbrae, Calif.	1,754.90	0.00	1,754.90
217	Cornerstone Advisory	Hunt Valley, Md.	1,741.87	0.00	1,741.87
218	SAX Wealth Advisors	Parsippany, N.J.	1,705.82	33.64	1,739.46
219	California Financial Advisors	San Ramon, Calif.	1,462.52	276.85	1,739.37
220	Sather Financial Group	Victoria, Texas	1,734.32	0.00	1,734.32
221	Pinnacle Advisors	Mansfield, Ohio	1,714.18	14.35	1,728.53
222	Condor Capital Wealth Management	Martinsville, N.J.	1,441.59	263.13	1,704.72
223	Berger Financial Group	Plymouth, Minn.	1,700.00	0.00	1,700.00
224	Abacus Planning Group	Columbia, S.C.	1,652.51	29.12	1,681.63
225	Beaird Harris Wealth Management	Dallas, Texas	1,654.25	19.94	1,674.19
226	Ensemble Capital Management	San Francisco, Calif.	1,662.68	0.00	1,662.68
227	Magnus Financial Group	New York, N.Y.	1,557.51	50.68	1,608.20
228	Narwhal Capital Management	Marietta, Ga.	1,412.72	170.73	1,583.45
229	Smith Anglin Financial	Dallas, Texas	1,501.13	70.29	1,571.43
230	Diversified	Wilmington, Del.	1,446.51	107.26	1,553.77
231	Diversified Portfolios	Bloomfield Hills, Mich.	1,523.88	22.66	1,546.54
232	Austin Asset	Austin, Texas	1,539.33	0.00	1,539.33
233	Patriot Investment Management Group	Knoxville, Tenn.	1,529.31	0.00	1,529.31
234	Traphagen Investment Advisors	Oradell, N.J.	1,455.94	72.39	1,528.33
235	Aveo Capital Partners	Englewood, Colo.	1,324.18	189.07	1,513.25
236	Azzad Asset Management	Falls Church, Va.	1,484.56	7.86	1,492.42
237	TrinityPoint Wealth	Milford, Conn.	1,278.73	138.25	1,416.98
238	Woodmont Investment Counsel	Nashville, Tenn.	1,377.05	33.47	1,410.52
239	Segment Wealth Management	Houston, Texas	1,410.13	0.00	1,410.13
240	Titleist Asset Management	San Antonio, Texas	1,387.78	14.02	1,401.80
241	Compound Planning	New York, N.Y.	983.50	412.45	1,395.95
242	PDS Planning	Dublin, Ohio	1,329.58	60.48	1,390.06
243	R W Investment Management	Eagle, Idaho	1,361.49	19.30	1,380.80
244	TFC Financial Management	Boston, Mass.	1,375.86	0.00	1,375.86

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245	Wealthstream Advisors	New York, N.Y.	1,347.24	0.00	1,347.24
246	3EDGE Asset Management	Naples, Fla.	1,327.94	0.00	1,327.94
247	Rebalance	Bethesda, Md.	1,312.75	0.00	1,312.75
248	Nottingham Advisors	Amherst, N.Y.	1,232.91	68.10	1,301.01
249	Valley National Advisors	Bethlehem, Pa.	1,297.64	0.00	1,297.64
250	Blue Chip Partners	Farmington Hills, Mich.	1,268.29	11.45	1,279.74
251	First Pacific Financial	Vancouver, Wash.	1,272.19	5.14	1,277.34
252	BigSur Partners	Miami, Fla.	601.17	624.48	1,225.65
253	Delta Financial Group	Basking Ridge, N.J.	1,124.99	72.41	1,197.40
254	Willis Johnson & Associates	Houston, Texas	1,090.71	76.87	1,167.58
255	Regatta Capital Group	El Segundo, Calif.	982.17	180.44	1,162.61
256	Benefit Financial Services Group	Irvine, Calif.	1,146.90	2.19	1,149.09
257	Petersen Hastings Wealth Advisors	Kennewick, Wash.	1,123.54	0.00	1,123.54
258	Straightline Group	Troy, Mich.	1,068.86	52.33	1,121.19
259	CJM Wealth Advisers	Falls Church, Va.	1,056.94	60.67	1,117.62
260	RWV Wealth	Los Angeles, Calif.	1,090.50	22.88	1,113.38
261	Janiczek Wealth Management	Denver, Colo.	1,109.94	0.00	1,109.94
262	Retirement Investment Advisors	Oklahoma City, Okla.	1,109.66	0.00	1,109.66
263	Isthmus Partners	Madison, Wis.	1,057.55	51.22	1,108.78
264	Kowal Investment Group	Brookfield, Wis.	975.67	133.00	1,108.67
265	Halpern Financial	Ashburn, Va.	1,098.49	0.00	1,098.49
266	Agili, P.C.	Richmond, Va.	1,083.96	12.25	1,096.21
267	Lynx Investment Advisory	Washington, D.C.	214.30	867.48	1,081.79
268	Palisade Asset Management	Minneapolis, Minn.	972.38	96.89	1,069.27
269	Abound Wealth Management	Franklin, Tenn.	1,065.31	0.00	1,065.31
270	Rollins Financial Advisors	Atlanta, Ga.	1,063.38	0.00	1,063.38
271	Evermay Wealth Management ‡	Arlington, Va.	1,037.28	25.30	1,062.57
272	MJP Wealth Advisors	Farmington, Conn.	1,056.63	0.00	1,056.63
273	Total Wealth Planning	Blue Ash, Ohio	997.88	57.48	1,055.36
274	Pinkerton Retirement Specialists	Coeur d'Alene, Idaho	948.09	85.29	1,033.38
275	Delegate Advisors	Chapel Hill, N.C.	252.29	779.95	1,032.24
276	Moisand Fitzgerald Tamayo	Orlando, Fla.	1,028.56	0.00	1,028.56
277	REDW Wealth	Albuquerque, N.M.	1,004.65	0.00	1,004.65
278	Lake Street Private Wealth	Chicago, Ill.	946.46	54.35	1,000.80
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION					
279	Fermata Advisors	Sonoma, Calif.	802.26	171.59	973.85
280	Signet Financial Management	Parsippany, N.J.	949.40	0.00	949.40
281	DiNuzzo Private Wealth	Beaver, Pa.	946.48	0.00	946.48
282	Verity Investment Partners	Beaufort, S.C.	930.88	7.90	938.78
283	Seasons of Advice Wealth Management	New York, N.Y.	887.56	44.26	931.81
284	Rappaport Reiches Capital Management	Skokie, Ill.	928.00	0.00	928.00
285	Financial Advisory Corporation	Grand Rapids, Mich.	913.27	0.00	913.27
286	Buffington Mohr McNeal	Boise, Idaho	893.49	18.27	911.76
287	SC&H Wealth	Sparks, Md.	904.91	4.01	908.92
288	Hemington Wealth Management	Falls Church, Va.	879.34	15.10	894.45
289	Stage Harbor Financial	Needham, Mass.	876.60	0.00	876.60
290	Yeske Buie	San Francisco, Calif.	862.24	10.78	873.02
291	Southern Financial Group	Birmingham, Ala.	854.84	0.00	854.84
292	Chemistry Wealth Management	New York, N.Y.	838.39	8.45	846.84

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RIA Discretionary & Non-Discretionary AUM Ranking

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293	McIlrath & Eck	Arlington, Wash.	839.59	0.00	839.59
294	Opal Wealth Advisors	Jericho, N.Y.	560.37	265.50	825.86
295	Falcon Wealth Planning	Ontario, Calif.	769.55	56.28	825.83
296	Glass Jacobson Investment Advisors	Owings Mills, Md.	806.01	11.30	817.31
297	Next Level Private	Harrison, N.Y.	781.63	29.07	810.71
298	J.W. Burns & Company	Dewitt, N.Y.	773.93	27.96	801.88
299	Richard P. Slaughter Associates	Austin, Texas	780.78	15.99	796.77
300	Catalyst Financial Partners ††	Boston, Mass.	795.25	0.00	795.25
301	Fi3 Financial Advisors	Indianapolis, Ind.	682.46	109.21	791.67
302	Insight Wealth Partners	Plano, Texas	788.32	1.64	789.96
303	Financial Insights Wealth Management	Tacoma, Wash.	789.09	0.00	789.09
304	Christopher Weil & Company	San Diego, Calif.	736.17	45.80	781.98
305	Blankinship & Foster	Solana Beach, Calif.	780.37	0.00	780.37
306	Great Lakes Retirement	Sheffield Village, Ohio	709.42	67.49	776.91
307	CapSouth Wealth Management	Dothan, Ala.	322.84	440.09	762.93
308	Omnia Family Wealth	Aventura, Fla.	640.11	119.61	759.72
309	William Mack & Associates	Troy, Mich.	752.58	2.20	754.78
310	Sikich Financial	Springfield, Ill.	744.64	4.42	749.06
311	Shorepoint Capital Partners	Norwood, Mass.	674.49	61.74	736.23
312	BlueSky Wealth Advisors ‡	New Bern, N.C.	730.18	0.00	730.18
313	Schnieders Capital Management	Pasadena, Calif.	684.47	40.56	725.04
314	Spectrum Investment Advisors	Mequon, Wis.	719.39	5.43	724.82
315	Frisch Financial Group	Melville, N.Y.	683.63	37.22	720.85
316	MG&A Wealth	Plantation, Fla.	683.75	34.76	718.51
317	Investmark Advisory Group	Shelton, Conn.	712.46	0.00	712.46
318	Porter White Investment Advisors	Birmingham, Ala.	697.55	9.77	707.32
319	AMI Investment Management	Kendallville, Ind.	705.32	0.00	705.32
320	Briaud Financial Advisors	College Station, Texas	691.92	13.12	705.04
321	Leisure Capital Management	Costa Mesa, Calif.	703.94	0.00	703.94
322	Keller Wealth Advisors	Victoria, Texas	692.60	11.29	703.89
323	Goodman Financial Corporation	Houston, Texas	698.59	0.00	698.59
324	Asset Management Group	Stamford, Conn.	695.51	0.00	695.51
325	Klaas Financial Asset Advisors	Loves Park, Ill.	569.00	113.00	682.00
326	Droms Strauss Wealth Management	Saint Louis, Mo.	672.37	3.79	676.16
327	Vance Wealth	Santa Clarita, Calif.	592.51	78.30	670.81
328	The L. Warner Companies	Timonium, Md.	657.43	0.00	657.43
329	High Net Worth Advisory Group	Naples, Fla.	617.46	31.23	648.68
330	OPTAS Capital	Austin, Texas	633.67	0.00	633.67
331	Net Worth Advisory Group	Sandy, Utah	366.90	265.22	632.12
332	Carolina Wealth Management	Greenville, N.C.	2.72	621.10	623.82
333	Arista Wealth Management	Las Vegas, Nev.	479.65	141.55	621.20
334	Morning Financial Advisors	Fremont, Calif.	606.99	0.00	606.99
335	Excalibur Management	Waltham, Mass.	600.62	5.78	606.40
336	Adams Wealth Advisors	Logan, Utah	603.49	0.00	603.49
337	Birchwood Financial Partners	Edina, Minn.	580.39	20.04	600.44
338	Optima Asset Management	Dallas, Texas	0.00	599.04	599.04
339	Marotta Wealth Management	Charlottesville, Va.	563.88	27.33	591.21
340	Clune & Associates	Chicago, Ill.	502.68	80.02	582.69
341	NorthCape Wealth Management	Willimsville, N.Y.	549.45	16.16	565.61

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342	Gradient Capital Advisors	San Diego, Calif.	465.93	80.49	546.42
343	Ballast	Lexington, Ky.	511.47	32.43	543.90
344	Financial Management Strategies	Broadview Heights, Ohio	432.99	109.03	542.02
345	Buckley Wealth Management	Las Vegas, Nev.	541.54	0.00	541.54
346	Monument Group Wealth Advisors	Concord, Mass.	535.58	0.00	535.58
347	J.W. Coons Advisors	Columbus, Ohio	480.03	53.77	533.80
348	Level Financial Advisors	East Amherst, N.Y.	529.56	0.00	529.56
349	Meritas Wealth Management	Larkspur, Calif.	523.18	0.00	523.18
350	Jentner Wealth Management	Akron, Ohio	517.86	4.72	522.58
351	Manske Wealth Management	Houston, Texas	513.33	0.00	513.33
352	Wilsey Asset Management	San Diego, Calif.	509.58	1.84	511.42
353	Financial Alternatives	La Jolla, Calif.	503.81	3.22	507.03
354	von Borstel & Associates	The Dalles, Ore.	504.44	0.00	504.44
ASSET CATEGORY: \$250 MILLION TO < \$500 MILLION					
355	Pinnacle Financial Group	Western Springs, Ill.	476.37	23.38	499.75
356	Asio Capital	Lexington, Ky.	499.55	0.00	499.55
357	Trinity Financial Advisors	Columbus, Ohio	485.91	1.42	487.33
358	WJ Interests	Sugar Land, Texas	484.00	0.00	484.00
359	Family Office Research	Bethesda, Md.	214.20	264.82	479.01
360	Transitions Wealth Management	Denver, Colo.	478.40	0.00	478.40
361	Marshall Financial Group	Hunt Valley, Md.	459.74	9.07	468.81
362	Sandbox Financial Partners	Bethesda, Md.	420.18	43.54	463.72
363	Asset Planning	Cypress, Calif.	445.30	1.20	446.50
364	Alpha Financial Advisors	Charlotte, N.C.	443.74	1.38	445.13
365	ARQ Wealth Advisors	Scottsdale, Ariz.	441.57	2.00	443.57
366	Fortitude Family Office	Scottsdale, Ariz.	413.29	21.04	434.33
367	Monument Capital Management \$\$\$	Alexandria, Va.	417.20	16.62	433.82
368	Dash Investments	Woodland Hills, Calif.	427.06	0.00	427.06
369	Winch Financial	Appleton, Wis.	420.20	0.00	420.20
370	QP Consulting	Takoma Park, Md.	66.40	352.69	419.10
371	ShoreHaven Wealth Partners	Red Bank, N.J.	400.87	17.23	418.10
372	Allodium Investment Consultants	Minneapolis, Minn.	396.43	0.00	396.43
373	Kercheville Advisors	San Antonio, Texas	356.14	38.42	394.56
374	StrongBox Wealth	Lee's Summit, Mo.	374.13	19.91	394.04
375	Jackson Square Capital	San Francisco, Calif.	252.21	141.48	393.69
376	WealthCrest Financial Services	Springfield, Va.	371.90	15.00	386.90
377	Searcy Financial Services	Overland Park, Kan.	372.76	5.10	377.86
378	McCarthy Asset Management	Redwood Shores, Calif.	366.20	0.00	366.20
379	Samalin Wealth	Chappaqua, N.Y.	326.97	37.55	364.52
380	R.W. Rogé & Company	Bohemia, N.Y.	321.00	15.00	336.00
381	Sard Wealth Management Group	Atlanta, Ga.	312.46	22.43	334.90
382	Elite Retirement Planning	Grimes, Iowa	334.80	0.00	334.80
383	Baron Financial Group	Fair Lawn, N.J.	327.66	4.12	331.78
384	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	318.90	3.69	322.59
385	Legacy CG (dba Legacy Consulting Group)	Plano, Texas	304.31	12.28	316.58
386	Navigoe	Redondo Beach, Calif.	314.62	1.94	316.56
387	Fortune Wealth Management	Dallas, Texas	303.20	2.80	306.00
388	Sebold Capital Management	Lisle, Ill.	233.07	70.73	303.81
389	Hurley Financial Group	Corvallis, Ore.	301.56	0.00	301.56

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390	Sharper & Granite	El Segundo, Calif.	299.86	0.00	299.86
391	Veripax Wealth Management	Folsom, Calif.	288.48	1.22	289.70
392	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	276.96	10.28	287.24
393	Canter Wealth	La Jolla, Calif.	286.61	0.00	286.61
394	FSA Advisors	Troy, Mich.	282.82	1.78	284.60
395	Integrated Capital Management	Bloomfield Hills, Mich.	283.16	0.00	283.16
396	Life Planning Partners	Jacksonville, Fla.	273.08	0.72	273.80
397	Centerline Wealth Advisors	Louisville, Ky.	258.49	2.51	261.00
398	Foresight Capital Management Advisors	Saline, Mich.	252.32	1.22	253.54
ASSET CATEGORY: \$150 MILLION TO < \$250 MILLION					
399	Kemp Financial Management	Fullerton, Calif.	0.00	230.00	230.00
400	Pearson Creek Capital Management	Chicago, Ill.	225.00	0.00	225.00
401	Kotys Wealth Professionals	Valparaiso, Ind.	223.43	0.00	223.43
402	Byrne Asset Management	Kingston, N.J.	210.87	0.00	210.87
403	Charleston Financial Advisors	Charleston, S.C.	206.09	4.62	210.71
404	TABR Capital Management	Orange, Calif.	203.44	0.00	203.44
405	RHS Financial	San Francisco, Calif.	190.44	7.66	198.11
406	Gold Medal Waters ‡	Boulder, Colo.	185.72	7.90	193.62
407	Center For Asset Management	Palm Beach Gardens, Fla.	193.34	0.00	193.34
408	Atwater Wealth Management	Boston, Mass.	190.05	2.61	192.66
409	Professional Financial Strategies	Pittsford, N.Y.	171.80	19.74	191.54
410	Westview Investment Advisors	Burlington, Vt.	178.83	1.63	180.46
411	Elderado Financial	Montrose, Colo.	172.27	0.00	172.27
412	Aldebaran Financial Insights	Kingsport, Tenn.	172.00	0.00	172.00
413	Lighthouse Wealth Management	Ashland, Ohio	170.42	0.00	170.42
414	Purtill Financial	Highland Heights, Ohio	0.00	166.49	166.49
415	Smith Bruer Advisors	Tallahassee, Fla.	107.76	51.84	159.60
416	Paragon Wealth Management	Provo, Utah	146.88	9.53	156.42
ASSET CATEGORY: < \$150 MILLION					
417	Ivy League Financial Advisors	Rockville, Md.	133.84	0.00	133.84
418	Steward Advisors	Chicago, Ill.	128.71	3.74	132.45
419	Strada Wealth Management	Austin, Texas	15.00	90.00	105.00
420	Meritas Advisors	San Rafael, Calif.	65.06	35.56	100.61
421	MTR Financial Services	Kingwood, Texas	97.74	0.00	97.74
422	Chilmark Financial Advisors	Miami, Fla.	84.83	0.00	84.83
423	The Leonard Financial Group	Riverside, Calif.	38.39	0.74	39.13
424	Safe Harbor Asset Management	Huntington, N.Y.	34.73	0.00	34.73
425	Venn Wealth & Benefit Services	Altoona, Pa.	20.62	1.59	22.21
426	Birch Investment Management	Brookings, S.D.	19.78	0.00	19.78
427	Aurora Strategic Advisors	Lumberton, N.C.	11.00	4.00	15.00
428	Old Oak Advisors	Vestavia Hills, Ala.	12.97	0.24	13.21
429	Atherean Wealth Management	Jersey City, N.J.	3.85	3.64	7.49
430	Carthage Financial Group	Braintree, Mass.	0.00	5.00	5.00
431	Destiny Wealth Partners	Tavares, Fla.	1.04	0.06	1.10

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