

FA'S 2009 INDEPENDENT RIA RANKING

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FA's 2009 RIA Ranking (By Total Assets)

2008 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2008 ASSETS (\$MM)	% GROWTH IN ASSETS 2007-2008	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
ASSET CATEGORY: \$1 BILLION AND OVER							
1	GenSpring Family Offices	Palm Beach Gardens, Fla.	15,550.49	18.41	20.01	-12.07	34.66
2	Moneta Group Investment Advisors	Clayton, Mo.	6,535.15	-17.56	3.08	-17.02	-0.65
3	Plante Moran Financial Advisors	Southfield, Mich.	5,343.49	-0.40	2.77	-31.22	44.82
4	Convergent Wealth Advisors	Rockville, Md.	5,253.55	-10.34	13.61	-43.32	58.20
5	Ronald Blue & Co.	Atlanta, Ga.	4,244.18	-21.70	0.57	-29.00	10.29
6	myCIO Wealth Partners	Philadelphia, Pa.	3,821.00	-15.29	11.08	-27.81	17.35
7	Beacon Pointe Advisors	Newport Beach, Calif.	3,641.70	-15.79	11.00	-36.90	33.47
8	Aspiriant	San Francisco, Calif.	3,607.05	-28.91	9.27	-35.67	10.51
9	RSM McGladrey	Minneapolis, Minn.	3,352.96	3.86	0.99	-5.64	10.07
10	The Mutual Fund Store	Overland Park, Kan.	3,347.28	-17.93	0.13	-35.96	28.16
11	Presidio Wealth Management	San Francisco, Calif.	3,319.16	-12.96	23.71	-7.36	-6.04
12	Clarfled Financial Advisors	Tarrytown, N.Y.	3,110.29	9.89	12.44	5.49	4.17
13	BBR Partners	New York, N.Y.	3,097.21	-14.23	49.16	-21.04	8.62
14	Edelman Financial Services	Fairfax, Va.	2,900.00	-23.68	0.29	-37.04	21.21
15	Ballentine, Finn & Company	Waltham, Mass.	2,530.00 ¹	29.41 ¹	22.19	24.87	3.64
16	GW & Wade	Wellesley, Mass.	2,371.00	-13.15	1.34	-18.87	7.05

Source: Discovery Database.

*Discretionary and nondiscretionary assets under management reported on Form ADV. ¹ In 2008 based on a re-reading of SEC definitions, Ballantine, Finn recategorized \$1.2 billion as nondiscretionary assets that were previously recorded as other assets not measured by this survey. Without the change, the firm's total AUM in this ranking would have dropped.

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17	Altair Advisers	Chicago, Ill.	2,087.51	-24.91	10.39	-30.51	8.06
18	Symmetry Partners	Glastonbury, Conn.	2,078.84	-31.09	0.13	-60.16	72.97
19	R.M. Davis	Portland, Me.	1,793.03	-23.19	1.30	-25.36	2.91
20	Hewins Financial Advisors	San Mateo, Calif.	1,744.00	-21.58	3.37	-37.33	25.12
21	Bingham, Osborn & Scarborough	San Francisco, Calif.	1,677.60	-19.83	2.24	-21.32	1.90
22	Buckingham Asset Management	St. Louis, Mo.	1,403.15	-16.45	1.04	-21.10	5.90
23	South Texas Money Management	San Antonio, Texas	1,401.61	-16.26	0.98	-25.44	12.31
24	Joel Isaacson & Co.	New York, N.Y.	1,355.49	-16.59	1.94	-21.35	6.06
25	Mariner Wealth Advisors	Leawood, Kan.	1,332.00	19.46	4.04	-2.26	22.22
26	Badgley, Phelps and Bell	Seattle, Wash.	1,320.79	-20.53	3.29	-27.26	9.24
27	Robertson Grieg & Thoele	Dallas, Texas	1,291.70	12.32	5.15	6.06	5.91
28	Telemus Capital Partners	Southfield, Mich.	1,215.65	-30.05	1.17	-39.46	15.54
29	United Capital Financial Advisers	Newport Beach, Calif.	1,214.89	33.11	0.27	-25.47	78.61
30	Silver Bridge	Boston, Mass.	1,201.54	-20.64	2.99	-19.85	-0.99
31	Savant Capital Management	Rockford, Ill.	1,192.89	-21.28	0.63	-26.91	7.70
32	Heck Capital Advisors	Rhinelander, Wis.	1,190.53	16.15	2.38	10.34	5.26
33	Wescott Financial Advisory Group	Philadelphia, Pa.	1,180.00	-22.62	4.45	-28.75	8.61
34	Balasa Dinverno Foltz	Itasca, Ill.	1,178.66	-20.80	1.59	-22.83	2.63
35	RMB Capital Management	Chicago, Ill.	1,140.65	-19.79	1.14	-24.74	6.58
36	MAI Wealth Advisors	Cleveland, Ohio	1,125.08	-12.38	1.13	-12.38	0.00
37	Massey Quick & Co.	Morristown, N.J.	1,111.72	-0.52	14.82	-21.75	27.12
38	Brighton Jones	Seattle, Wash.	1,109.00	-26.26	2.70	-39.57	22.02
39	Plancorp	St. Louis, Mo.	1,099.52	-25.22	2.88	-32.66	11.05
40	Dowling & Yahnke	San Diego, Calif.	1,099.50	-17.43	1.59	-21.13	4.69
41	Ameritas Investment Corp.	Lincoln, NE	1,067.16	-16.16	0.11	-23.88	10.13
42	Molewski Financial Solutions	Bethlehem, Pa.	1,066.20	-13.09	5.50	-17.12	4.86
43	Kovitz Investment Group	Chicago, Ill.	1,062.00	-3.23	1.42	-12.26	10.29
44	Budros, Ruhlin & Roe	Columbus, Ohio	1,004.52	-26.67	1.82	-33.58	10.40
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION							
45	HBK Sorce Financial	Erie, Pa.	990.84	-2.53	0.27	-4.94	2.53
46	Financial Management Partners	Clayton, Mo.	970.00	14.12	6.55	2.55	11.28
47	Heritage Investors Management Corp.	Bethesda, Md.	931.66	-20.98	2.19	-25.63	6.25
48	Cary Street Partners	Richmond, Va.	910.00	-17.27	0.91	-33.82	25.00
49	RCL Advisors	New York, N.Y.	881.72	-15.62	9.28	-26.28	14.46
50	SignatureFD	Atlanta, Ga.	876.29	-12.48	2.40	-19.92	9.28
51	The Colony Group	Boston, Mass.	858.73	-25.69	1.18	-22.41	-4.22
52	ThomasPartners	Wellesley Mass.	831.03	-10.26	1.04	-32.69	33.33
53	Creative Planning	Leawood, Kan.	816.44	17.98	1.13	-19.45	46.46
54	Mintz Levin Financial Advisors	Boston, Mass.	807.17	-29.61	2.35	-29.20	-0.58
55	JMG Financial Group	Oak Brook, Ill.	806.24	-27.91	1.45	-28.82	1.27
56	Lee Financial Corporation	Dallas, Texas	791.58	-20.48	1.87	-15.40	-6.00
57	WMS Partners	Towson, Md.	790.56	-10.67	4.37	-5.24	-5.73
58	Honkamp Krueger Financial Services	Dubuque, Iowa	788.03	-24.98	0.32	-27.98	4.17
59	Iron Financial	Northbrook, Ill.	779.00	-10.67	1.00	-13.08	2.77
60	Morton Capital Management	Calabasas, Calif.	759.40	-14.77	1.54	-26.72	16.31
61	Parsec Financial	Asheville, N.C.	749.72	-24.36	0.73	-27.68	4.58
62	Brouwer & Janachowski	Tiburon, Calif.	745.12	8.00	2.38	-22.71	39.73
63	Sage Financial Group	West Conshohocken, Pa.	725.53	-21.56	1.42	-26.18	6.25
64	Cassaday & Company	McLean, Va.	718.19	-21.77	0.80	-36.80	23.80

Source: Discover y Database. *Discretionary and nondiscretionary assets under management reported on Form ADV.
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65	TrustCore Financial Services	Brentwood, Tenn.	714.75	-10.25	0.86	-14.58	5.06
66	Foster Group	West Des Moines, Iowa	708.40	-25.85	0.87	-31.78	8.69
67	Resource Consulting Group	Orlando, Fla.	701.39	-35.95	2.26	-36.57	0.98
68	Whitnell & Co.	Oak Brook, Ill.	676.31	-9.55	1.35	-54.77	100.00
69	Harold C. Brown & Co.	Buffalo, N.Y.	667.02	-25.32	0.65	-23.09	-2.91
70	Stonebridge Capital Advisors	St. Paul, Minn.	631.50	-0.13	0.99	-19.85	24.61
71	The Karras Company	Roy, Utah	619.70	14.13	4.08	6.62	7.04
72	Carlson Capital Management	Northfield, Minn.	618.65	-31.36	1.28	-23.15	-0.68
73	Pacific West Financial Consultants	Renton, Wash.	603.86	-3.69	0.13	-14.39	12.50
74	Olson Mobeck Investment Advisors	Wethersfield, Conn.	597.26	-22.97	0.65	-23.81	1.10
75	Portfolio Solutions	Troy, Mich.	591.38	-26.50	1.31	-27.48	1.34
76	Truepoint	Cincinnati, Ohio	590.42	-23.31	1.64	-34.85	17.70
77	WTAS	McLean, Va.	580.85	-49.67	5.59	-51.12	2.97
78	Osborne Partners Capital Management	San Francisco, Calif.	580.37	-28.61	1.66	-38.81	16.67
79	Quest Capital Management	Dallas, Texas	575.93	-6.32	1.78	-8.92	2.86
80	Patriot Wealth Management	Houston, Texas	572.80	-11.78	1.78	-21.95	13.03
81	Foster & Motley	Cincinnati, Ohio	570.70	-24.02	1.78	-23.30	-0.93
82	JFS Wealth Advisors	Hermitage, Pa.	566.44	-32.28	0.79	-34.72	3.75
83	ProVise Management Group	Clearwater, Fla.	564.00	-24.09	1.03	-24.79	0.92
84	SYM Financial Advisors	Warsaw, Ind.	558.12	-26.63	1.00	-27.68	1.45
85	Hamilton Capital Management	Columbus, Ohio	551.23	-25.37	0.81	-28.43	4.27
86	The Harbor Group	Bedford, N.H.	549.60	-14.78	0.83	-13.62	-1.35
87	Enright Premier Wealth Advisors	Torrance, Calif.	545.00	4.81	0.94	2.10	2.65
88	Brightworth	Atlanta, Ga.	544.02	-27.69	1.68	-34.61	10.58
89	Capital Performance Advisors	Walnut Creek, Calif.	543.57	-19.44	0.86	-19.44	0.00
90	PFG Financial Advisors Network	State College, Pa.	543.20	-21.10	0.33	-24.21	4.10
91	Strategic Wealth Partners	Deerfield, Ill.	539.00	†	2.16	†	†
92	Independent Financial Group	San Diego, Calif.	532.34	26.20	0.15	-17.22	52.45
93	Pinnacle Advisory Group	Columbia, Md.	531.09	-4.08	0.94	-15.98	14.17
94	Legacy Wealth Management	Memphis, Tenn.	531.01	-7.39	1.10	-19.47	15.00
95	Charles D. Haines	Birmingham, Ala.	508.37	-3.28	1.01	2.27	-5.43
96	Dion Money Management	Williamstown, Mass.	507.85	-41.15	0.30	-35.24	-9.13
97	StrategicPoint Investment Advisors	Providence, R.I.	502.11	-23.93	0.40	-14.76	-10.76
98	Resnick Investment Advisors	Westport, Conn.	500.00	-13.64	0.60	-18.06	5.40
ASSET CATEGORY: \$300 MILLION TO < \$500 MILLION							
99	WESCAP Management Group	Burbank, Calif.	488.21	-26.49	1.51	-30.12	5.19
100	Diesslin & Associates	Fort Worth, Texas	478.40	-4.51	1.43	-9.37	5.36
101	Arbor Capital Management	Amherst, N.Y.	476.77	6.14	1.34	-8.73	16.29
102	LLBH Private Wealth Management	Westport, Conn.	475.00	‡	2.38	‡	‡
103	Fairway Wealth Management	Independence, Ohio	460.00	-14.81	4.69	-28.72	19.51
104	Evensky & Katz	Coral Gables, Fla.	460.00	-16.67	1.88	-21.77	6.52
105	CFS Investment Advisory Services	Totowa, N.J.	458.83	-27.31	1.33	-24.15	-4.17
106	Briaud Financial Advisors	Bryan, Texas	448.97	-2.35	1.84	-3.95	1.67
107	Abacus Planning Group	Columbia, S.C.	446.23	-14.94	2.75	-20.19	6.58
108	American Economic Planning Group	Watchung, N.J.	441.50	-32.24	1.06	-30.14	-3.02
109	Meyer Capital Group	Marlton, N.J.	434.99	-25.22	0.62	-30.56	7.69
110	Lenox Wealth Management	Cincinnati, Ohio	431.83	-16.54	1.93	-23.99	9.80
111	Altfest Personal Wealth Management	New York, N.Y.	418.80	-21.84	1.13	-24.37	3.34
112	Sadoff Investment Management	Milwaukee, Wis.	412.40	3.46	0.90	-6.68	10.87

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113	Cypress Wealth Advisors	San Francisco, Calif.	409.57	-47.56	11.07	-53.23	12.12
114	Waypoint Advisors	Norfolk, Va.	408.95	-21.78	4.81	-35.58	21.43
115	Jackson Thornton Asset Management	Montgomery, Ala.	407.07	-30.06	1.17	-31.06	1.45
116	Lau Associates	Wilmington, Del.	400.00	-33.33	3.10	-33.33	0.00
117	Redstone Advisors	Wichita, Kan.	396.66	11.12	6.20	-30.55	60.00
118	IPI Asset Management	Decatur, Ill.	396.04	-7.56	0.38	-27.81	28.05
119	Weaver Tidwell Wealth Management	Dallas, Texas	390.00	6.85	1.03	-29.70	52.00
120	Arthur M. Cohen & Associates	Northbrook, Ill.	389.85	-19.62	§ §		
121	Summit Financial Strategies	Columbus, Ohio	388.06	-19.18	0.94	-23.47	5.61
122	HoyleCohen Wealth Management	San Diego, Calif.	373.00	-15.23	0.91	-34.77	29.97
123	Sigma Investment Counselors	Southfield, Mich.	370.85	-31.89	0.87	-31.09	-1.17
124	WESPAC Advisors	Oakland, Calif.	370.24	-18.87	0.51	-28.23	13.05
125	Towneley Capital Management	Laguna Hills, Calif.	367.34	-16.70	2.89	-14.08	-3.05
126	Heritage Financial Services	Norwood, Mass.	365.87	-7.41	0.56	11.11	-16.67
127	Modera Wealth Management	Old Tappan, N.J.	364.75	-16.16	1.59	-26.74	14.43
128	Eclectic Associates	Fullerton, Calif.	352.28	-3.49	0.81	-3.04	-0.46
129	Founders Financial Network	Cupertino, Calif.	349.72	-27.53	4.32	-29.32	2.53
130	CPS Investment Advisors	Lakeland, Fla.	341.94	-19.02	0.40	-22.79	4.88
131	Salient-Friedman Wealth Management	San Rafael, Calif.	341.84	-24.70	1.54	-20.30	-5.53
132	Strategic Financial Management Group	Dallas, Texas	340.12	-5.16	1.02	-3.18	-2.05
133	Vista Capital Partners	Portland, Ore.	327.85	-15.06	1.30	-17.41	2.85
134	Kistler Tiffany Advisors	Berwyn, Pa.	327.51	‡	0.73	‡	‡
135	Pinnacle Wealth Planning Services	Mansfield, Ohio	325.90	-15.57	0.95	-19.52	4.91
136	Northwest Financial Group	Herndon, Va.	319.00	†	0.12	†	†
137	Delessert Financial Services	Waltham, Mass.	307.62	-24.60	2.59	-29.04	6.25
138	Sovereign Wealth Management	Memphis, Tenn.	307.26	-31.62	1.45	-39.04	12.17
139	Sharkey, Howes & Javer	Denver, Colo.	306.88	-24.83	0.32	-25.53	0.94
140	Phillips Financial Management	Fort Wayne, Ind.	305.53	-10.47	0.74	-2.41	-8.26
141	Horan Capital Management	Baltimore, Md.	304.35	-36.64	0.32	-62.56	69.23
142	Legend Financial Advisors	Pittsburgh, Pa.	301.54	-6.92	1.16	-11.95	5.71
143	GM Advisory Group	Port Washington, N.Y.	300.00	11.11	2.61	-3.38	15.00
144	Oxford Investment Partners	Phoenix, Ariz.	300.00	-11.76	2.50	-26.47	20.00
ASSET CATEGORY: \$100 MILLION TO < \$300 MILLION							
145	William Mack & Associates	Troy, Mich.	299.15	66.00	0.93	64.97	0.63
146	Cornerstone Capital Advisors	Uniontown, Ohio	297.00	-19.71	0.94	-36.93	27.31
147	Back Bay Financial Group	Boston, Mass.	293.80	-22.10	1.22	-23.72	2.12
148	JWA Financial Group	Dallas, Texas	290.35	-29.80	0.68	-33.60	5.72
149	Retirement Investment Advisors	Oklahoma City, Okla.	285.22	-37.31	0.56	5.72	-40.70
150	Spero-Smith Investment Advisors	Cleveland, Ohio	281.16	-27.17	1.00	-30.28	4.46
151	Burt Associates	Rockville, Md.	279.98	-21.85	1.46	-24.70	3.78
152	Mosaic Financial Partners	San Francisco, Calif.	279.39	-27.39	1.28	-28.72	1.87
153	Sequoia Financial Advisors	Akron, Ohio	279.10	-3.60	0.45	-2.83	-0.79
154	MACRO Consulting Group	Parsippany, N.J.	275.00	-15.38	0.58	-10.53	-5.42
155	Westport Resources	Westport, Conn.	272.82	-27.64	0.94	-21.38	-7.96
156	MLR Wealth Management	Austin, Texas	271.69	-14.24	1.95	-19.79	6.92
157	Petersen Hastings	Kennewick, Wash.	268.48	-29.65	0.76	-17.82	-14.39
158	CJM Wealth Advisers	Fairfax, Va.	266.02	-26.90	0.57	-28.46	2.18
159	Park Piedmont Advisors	New York, N.Y.	263.60	-16.89	0.88	-20.51	4.56
160	Smith Anglin Financial	Dallas, Texas	254.00	-21.02	0.70	-26.68	7.72

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161	Greystone Financial Group	Troy, Mich.	249.00	-23.65	0.78	-21.50	-2.74
162	BHCO Capital Management	Dallas, Texas	248.54	-11.90	1.34	-21.84	12.73
163	Jackson Financial Management	Costa Mesa, Calif.	247.10	-20.30	0.75	-29.74	13.45
164	The Family Firm	Bethesda, Md.	242.53	-18.57	1.64	-27.37	12.12
165	HighTower Advisors	Chicago, Ill.	237.65	‡	0.64	‡	‡
166	McKinley Carter Wealth Services	Wheeling, W. Va.	229.79	-22.08	0.46	-53.25	66.67
167	Elliott Davis Investment Advisors	Greenville, S.C.	226.78	-21.97	0.45	-25.06	4.12
168	Stevens First Principles	Newport Beach, Calif.	223.93	12.21	1.79	-16.52	34.41
169	Rodgers & Associates	Lancaster, Pa.	221.64	-25.01	0.54	-28.67	5.13
170	Weatherly Asset Management	Del Mar, Calif.	219.85	-0.77	1.07	-14.74	16.38
171	Capelli Financial Services	Bloomfield Hills, Mich.	218.52	-24.38	1.32	-26.21	2.47
172	Yeske Buie	San Francisco, Calif.	217.70	-27.55	1.23	-30.42	4.12
173	Old North Advisors	Boston, Mass.	217.38	-34.07	2.17	-34.07	0.00
174	Wade Financial Group	Minneapolis, Minn.	215.00	-15.69	1.17	-21.64	7.60
175	Kovack Advisors	Fort Lauderdale, Fla.	212.84	0.83	0.25	-27.52	39.11
176	Financial Advantage	Columbia, Md.	210.00	-3.67	1.17	-9.02	5.88
177	HJ Wealth Management	Plymouth Meeting, Pa.	208.20	5.00	0.83	-16.00	25.00
178	Lodestar Private Asset Management	Alamo, Calif.	205.77	-29.83	1.55	-27.19	-3.62
179	The L. Warner Companies	Timonium, Md.	202.63	-29.75	1.18	-33.84	6.17
180	West Oak Capital	Westlake Village, Calif.	202.11	-15.88	2.69	-15.88	0.00
181	Fox, Joss & Yankee	Reston, Va.	200.69	-19.12	0.93	-21.00	2.38
182	Richard P. Slaughter Associates	Austin, Texas	200.00	27.39	0.57	29.21	-1.41
183	Schneider Downs Wealth Management Advisors	Pittsburgh, Pa.	199.78	-20.32	1.02	-28.04	10.73
184	Oak Financial Group	Stamford, Conn.	198.37	-8.32	0.88	-12.39	4.65
185	ACG Advisory Services	Midlothian, Va.	191.08	-23.29	0.73	-29.49	8.79
186	Douglass Winthrop Advisors	New York, N.Y.	190.83	-20.81	0.66	-24.66	5.11
187	Johnson, Bender & Company	Houston, Texas	189.70	-23.82	0.63	-27.62	5.26
188	Educators Financial Services	Cambridge, Minn.	186.12	-12.67	0.03	-54.90	93.66
189	Schiavi & Dattani	Wilmington, Del.	186.00	-15.49	1.58	-21.22	7.27
190	The Planning Center	Moline, Ill.	186.00	34.01	1.27	70.72	-21.51
191	CRA Financial	Northfield, N.J.	184.62	-12.61	0.68	-14.85	2.63
192	Ferrell Wealth Management	Winter Park, Fla.	180.00	-24.87	0.96	-29.67	6.82
193	New Century Financial Group	Princeton, N.J.	178.22	-0.31	0.34	-22.57	28.75
194	TGS Financial Advisors	Radnor, Pa.	176.70	-26.81	0.66	-26.26	-0.75
195	White Oaks Wealth Advisors	Minneapolis, Minn.	176.06	-34.84	0.74	-36.21	2.14
196	Prosper Advisors	Armonk, N.Y.	175.22	0.68	2.06	-11.16	13.33
197	North Berkeley Investment Partners	Berkeley, Calif.	174.27	-28.15	0.85	-31.67	5.15
198	Mark J. Snyder Financial Services	Medford, N.Y.	172.00	-15.52	0.41	-18.34	3.45
199	Schroeder, Braxton & Vogt	Amherst, N.Y.	168.73	-23.81	0.39	-25.55	2.34
200	The Arkansas Financial Group	Little Rock, Ark.	168.43	-15.24	0.86	-21.76	8.33
201	SilverOak Wealth Management	Minneapolis, Minn.	168.10	-12.06	0.90	-22.40	13.33
202	WealthQuest Financial Services	Norfolk, Va.	167.12	-27.60	0.87	-29.87	3.23
203	Stonegate Wealth Management	Fair Lawn, N.J.	167.00	-0.18	0.80	-7.31	7.69
204	Traphagen Investment Advisors	Oradell, N.J.	166.92	-16.61	0.22	-20.64	5.07
205	Investors Capital Management	Menlo Park, Calif.	165.92	-30.24	0.47	-28.84	-1.96
206	Rowling, Dold & Associates	San Diego, Calif.	165.00	-20.29	0.97	-22.63	3.03
207	Sheaff Brock Investment Advisors	Indianapolis, Ind.	165.00	-38.20	0.35	-41.89	6.35
208	Smith & Howard Wealth Management	Atlanta, Ga.	164.48	-25.99	1.11	-27.99	2.78
209	KHC Wealth Management Services	Overland Park, Kan.	161.70	-25.14	0.98	-29.67	6.45

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210	Heritage Wealth Management	San Diego, Calif.	161.00	-19.90	0.64	-23.10	4.17
211	Herbein Wealth Management	Wyomissing, Pa.	160.62	-13.15	0.99	-16.90	4.52
212	Center for Financial Planning	Southfield, Mich.	159.71	0.00	0.18	-4.13	4.31
213	Tilson Financial Group	Watchung, N.J.	156.26	-20.81	0.52	-16.06	-5.66
214	FAC Wealth Management	Naples, Fla.	153.59	17.16	0.51	-17.14	41.40
215	DCA Global Investment Management	Norcross, Ga.	150.95	-18.39	1.59	-31.28	18.75
216	Sycamore Financial Group	Kokomo, Ind.	149.80	-16.78	0.12	-27.18	14.29
217	Capital Planning Advisory Group	Yardley, Pa.	149.52	-18.02	0.52	-23.13	6.64
218	McCarthy Grittinger Weil Financial Group	Milwaukee, Wis.	149.44	-24.33	0.58	-28.13	5.28
219	Ritter Daniher Financial Advisory	Cincinnati, Ohio	148.35	30.89	1.11	17.22	11.67
220	Moisand Fitzgerald Tamayo	Maitland, Fla.	148.26	-18.86	0.55	-21.26	3.04
221	Bridgewater Wealth Management	Bethesda, Md.	147.44	-18.09	1.30	-31.14	18.95
222	Asset Strategies	Casper, Wyo.	147.10	-23.18	0.70	-28.33	7.18
223	Financial Planning & Information Services	De Pere, Wis.	144.25	-18.80	0.29	-27.07	11.34
224	Smedley Financial Services	Salt Lake City, Utah	143.34	-32.93	0.14	-29.74	-4.55
225	Retirement Strategies	Jacksonville, Fla.	141.42	19.97	0.76	11.59	7.51
226	Wechter Financial Services	Parsippany, N.J.	140.54	-3.08	1.06	-6.02	3.13
227	Sensible Financial Planning and Management	Cambridge, Mass.	140.50	-9.78	0.90	-27.71	24.80
228	Clientfirst Wealth Management	Little Rock, Ark.	140.00	64.71	3.50	2.94	60.00
229	Geier Asset Management	Marriottsville, Md.	139.06	-26.83	0.78	-38.68	19.33
230	Financial Management Group	Cincinnati, Ohio	137.61	-14.87	0.82	-20.47	7.05
231	Fernwood Investment Management	Quincy, Mass.	136.68	-10.61	1.18	-25.25	19.59
232	RB Capital Management	Fresno, Calif.	135.93	-10.27	0.49	-19.88	12.00
233	Ward & Associates	Rancho Santa Fe, Calif.	134.92	-31.14	2.59	-33.79	4.00
234	Winch Advisory Services	Appleton, Wis.	134.90	-25.22	0.42	-37.72	20.07
235	Sanders Financial Management	Norcross, Ga.	132.67	-17.59	0.78	-27.77	14.09
236	Copeland Wealth Management	Redlands, Calif.	131.63	-25.42	0.59	-28.74	4.65
237	LifePlan Financial Group	Miamisburg, Ohio	131.45	-27.70	0.31	-42.23	25.15
238	Lewis Financial Management	Raleigh, N.C.	131.43	-27.96	1.21	-30.61	3.81
239	Results One Financial	Elmhurst, Ill.	129.59	-33.31	0.33	-39.14	9.58
240	TABR Capital Management	Orange, Calif.	128.83	-18.53	0.52	-19.84	1.63
241	Roof Advisory Group	Harrisburg, Pa.	128.00	11.98	1.33	-5.51	18.52
242	Hardy Reed Capital Advisors	Tupelo, Miss.	127.83	9.95	0.86	4.75	4.96
243	Crescent Sterling	Metairie, La.	127.56	-9.33	0.71	-21.42	15.38
244	Stevens Wealth Management	Deerfield, Ill.	127.40	-2.91	1.36	-10.14	8.05
245	Sather Financial Group	Victoria, Texas	126.09	-18.24	0.88	6.74	-23.40
246	Pickler Wealth Advisors	Collierville, Tenn.	125.65	-16.24	0.42	-15.68	-0.66
247	Garnet Group	Boston, Mass.	125.61	-20.03	1.29	-21.68	2.11
248	BondStreet Wealth Management	Everett, Wash.	125.00	-22.36	0.28	-39.61	28.57
249	Planned Solutions	Sacramento, Calif.	123.86	-34.24	0.33	-33.37	-1.30
250	Investors Asset Management	Plano, Texas	123.29	-16.80	0.66	-19.48	3.33
251	Jentner Financial Group	Akron, Ohio	123.18	-33.79	0.98	-34.32	0.80
252	Callan Capital	La Jolla, Calif.	123.00	-3.15	2.12	-14.84	13.73
253	c5 Wealth Management	Great Falls, Va.	122.00	-2.40	0.34	-45.78	80.00
254	A&F Financial Advisors	Charleston, W. Va.	121.49	-21.82	0.81	-33.81	18.11
255	Tarpley & Underwood Financial Advisors	Atlanta, Ga.	121.09	-21.79	1.07	-16.94	-5.83
256	WheelerFrost Associates	San Diego, Calif.	120.98	-25.32	1.00	-25.94	0.83
257	Acorn Financial Services	Fairfax, Va.	120.64	-35.76	0.15	-41.40	9.63
258	Trinity Financial Advisors	Chicago, Ill.	120.50	-34.79	2.11	-31.36	-5.00

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259	Chitwood-Lindberg Wealth Management	Birmingham, Ala.	120.00	-0.83	0.80	-14.05%	15.38
260	Classic Capital	Short Hills, N.J.	118.88	-4.51	1.28	-12.73	9.41
261	Schultz Financial Group	Reno, Nev.	118.32	-25.83	1.26	-23.46	-3.09
262	Hopwood Financial Services	Great Falls, Va.	117.89	-5.70	1.10	-13.63	9.18
263	Empyrion Wealth Management	Roseville, Calif.	117.34	-19.42	1.41	-19.42	0.00
264	Certified Planners	San Ramon, Calif.	117.31	-9.76	0.32	-14.64	5.71
265	Asset Management Group	Stamford, Conn.	115.38	-22.21	0.60	-20.59	-2.03
266	CPFA	Greenwood Village, Colo.	115.00	-8.44	2.09	-8.44	0.00
267	Allodium Investment Consultants	Minneapolis, Minn.	114.54	-26.98	1.36	-26.98	0.00
268	Tortoise Investment Management	White Plains, N.Y.	114.32	6.87	1.08	-22.37	37.66
269	Mutual Fund Management	Troy, Mich.	113.71	-29.06	0.44	-29.06	0.00
270	Appleton Group Wealth Management	Appleton, Wis.	113.00	44.87	0.95	16.87	23.96
271	Salem Partners Wealth Management	Los Angeles, Calif.	112.14	43.63	10.19	4.46	37.50
272	Vintage Financial Services	Ann Arbor, Mich.	111.13	-32.49	0.46	-36.38	6.11
273	KMH Wealth Management	Victoria, Texas	109.84	-8.69	0.65	-16.21	8.97
274	Financial Service Group	Racine, Wis.	109.73	-24.99	0.71	-26.45	1.99
275	Horizon Advisors	Houston, Texas	109.45	-17.38	2.19	17.32	-29.58
276	Rappaport Reiches Capital Management	Glenview, Ill.	109.40	14.44	1.24	-12.87	31.34
277	The Lubitz Financial Group	Miami, Fla.	108.80	-24.97	1.10	-27.24	3.13
278	Signal Securities	Fort Worth, Texas	108.00	4.85	0.27	32.05	-20.59
279	Alliance Wealth Management	Milwaukee, Wis.	107.43	-28.37	0.28	-25.58	-3.75
280	National Wealth Management	Moonachie, N.J.	107.00	13.83	1.00	-4.26	18.89
281	Bedrock Capital Management	Los Altos, Calif.	106.44	-28.65	1.01	12.12	-36.36
282	FP Financial Services	Palatine, Ill.	105.00	-19.23	0.42	-21.15	2.43
283	D B & B Financial Services	Syracuse, N.Y.	104.45	3.93	0.39	-1.95	6.00
284	Summit Wealth Group	Colorado Springs, Colo.	103.00	-17.60	0.17	-33.44	23.80
285	Investmark	Stratford, Conn.	102.36	-44.66	0.32	-44.15	-0.92
286	WJ Interests	Sugar Land, Texas	101.60	-23.20	0.80	-30.46	10.43
287	Nova Wealth Management Group	Atlanta, Ga.	101.27	-13.86	0.99	-19.77	7.37
ASSET CATEGORY: \$75 MILLION TO < \$100 MILLION							
288	Gainsborough Financial Consultants	Los Angeles, Calif.	99.55	-8.96	0.79	-4.62	-4.55
289	Asset Planning Corporation	Knoxville, Tenn.	97.93	-25.15	0.78	-22.75	-3.10
290	Financial Connections Group	Corte Madera, Calif.	97.04	-26.61	0.56	-28.73	2.98
291	Investment Advisory Professionals	Boca Raton, Fla.	95.00	-28.57	1.06	-30.16	2.27
292	Private Capital Management	Larkspur, Calif.	95.00	-13.64	2.11	-7.88	-6.25
293	Houlihan Financial Resource Group	Reston, Va.	94.27	-24.07	1.31	-33.56	14.29
294	Witt Mares Financial Vision	Williamsburg, Va.	94.12	-13.22	0.40	-13.59	0.43
295	Camarda Financial Advisors	Fleming Island, Fla.	91.07	-48.84	0.20	-41.74	-12.19
296	Miller Advisors	Kirkland, Wash.	91.00	-25.41	0.44	-20.73	-5.91
297	The Advisory Group	Diamond Bar, Calif.	90.47	-25.89	0.20	-36.22	16.20
298	Focus Financial Advisors	Rockford, Ill.	90.18	-25.41	0.84	-27.50	2.88
299	Wealth Care	Merritt Island, Fla.	90.00	28.57	1.29	-8.16	40.00
300	Kahler Financial Group	Rapid City, S.D.	88.93	-32.67	1.29	-35.60	4.55
301	Grand Wealth Management	Grand Rapids, Mich.	88.43	62.64	0.74	-64.76	361.54
302	Focus Wealth Management	Middleburg, Va.	86.48	-19.93	1.07	-20.92	1.25
303	JG Advisors	Morristown, N.J.	85.87	-22.87	1.19	-21.80	-1.37
304	YellowWood Financial Advisors	Gaithersburg, Md.	85.29	9.07	1.12	-32.55	61.70
305	The Darrow Company	Concord, Mass.	84.76	-24.36	0.84	-26.60	3.06
306	Holbrook Global Strategies	Palo Alto, Calif.	84.10	-25.04	2.71	-25.04	0.00

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307	McCarthy Asset Management	Redwood Shores, Calif.	82.80	-33.33	0.43	-33.33	0.00
308	SKM Wealth Management	Providence, R.I.	82.40	-18.09	0.56	-23.14	6.57
309	Financial Management Concepts	Winter Springs, Fla.	82.27	-18.11	0.61	-21.17	3.88
310	21st Century Wealth Management	York, Pa.	81.81	-3.83	1.70	-9.84	6.67
311	Kemp Financial Management	Fullerton, Calif.	80.05	-27.91	0.61	-31.73	5.60
312	Paradigm Financial Advisors	Des Peres, Mo.	78.63	-29.08	0.72	-33.64	6.86
313	RMR Financial Advisors	Madison, Wis.	77.62	-33.20	0.33	-36.36	4.98
314	Kelly Financial Group	Wethersfield, Conn.	77.06	-19.94	0.13	-23.26	4.33
315	Financial Symmetry	Raleigh, N.C.	75.00	-11.76	0.41	-25.27	18.06
ASSET CATEGORY: \$50 MILLION TO < \$75 MILLION							
316	Andrews, Lucia Wealth Management	San Mateo, Calif.	73.37	-26.64	1.16	-34.79	12.50
317	MJB Asset Management	New York, N.Y.	73.32	-18.43	0.81	-17.53	-1.09
318	Wealth Planning	Cincinnati, Ohio	72.95	-31.03	0.39	-31.76	1.08
319	Century Wealth Management	Memphis, Tenn.	71.33	-19.64	4.46	-29.68	14.29
320	Cornerstone Advisory	Baltimore, Md.	70.62	2.25	0.44	-19.21	26.56
321	Harbor Financial Group	Boulder, Colo.	70.45	-9.20	0.76	-17.99	10.71
322	Berno Financial Management	Cincinnati, Ohio	69.86	-27.32	1.00	-27.32	0.00
323	Professional Financial Strategies	Pittsford, N.Y.	69.31	-17.56	0.96	-15.27	-2.70
324	The Coastal Advisory Group	Cincinnati, Ohio	69.20	8.53	0.23	-4.99	14.23
325	RPH Financial Services	Sciota, Pa.	68.52	-34.89	0.59	-0.10	-34.83
326	Royal Capital Management	Boca Raton, Fla.	68.10	14.21	0.91	3.55	10.29
327	Caton Financial	Larkspur, Calif.	68.07	-28.90	0.43	-28.90	0.00
328	Zeller Kern Private Wealth Management	Gold River, Calif.	68.00	-8.11	0.43	-13.85	6.67
329	Roseman Wagner Wealth Management	Loomis, Calif.	66.47	‡	0.46	‡	‡
330	Helm Investment Management	Denver, Colo.	66.42	-26.78	1.15	-35.61	13.73
331	SimonDavis Asset Management	Denver, Colo.	65.85	-0.09	0.13	-30.06	42.86
332	Whitcomb & Hess	Ashland, Ohio	65.10	-18.18	0.09	-20.45	2.86
333	Asset Planning	Cypress, Calif.	65.10	-9.90	0.41	-17.89	9.72
334	Sard Wealth Management Group	Atlanta, Ga.	65.00	-16.67	0.26	-41.67	42.86
335	JVL Associates	Wyoming, Mich.	63.50	-34.74	3.97	-34.74	0.00
336	Kasanow & Associates: Wealth Management	Honolulu, Hawaii	63.41	-23.93	0.55	-19.96	-4.96
337	JDH Wealth Management	Santa Rosa, Calif.	61.86	-22.79	0.94	-25.13	3.13
338	Covenant Wealth Advisors	Williamsburg, Va.	61.61	-16.26	0.62	-23.87	10.00
339	Dorman Financial Management	Maitland, Fla.	61.00	-35.79	0.24	-35.79	0.00
340	Mader & Shannon Wealth Management	Kansas City, Mo.	59.30	20.98	0.46	-4.15	26.21
341	Ivy League Financial Advisors	Rockville, Md.	57.53	-22.62	0.65	-24.36	2.30
342	Family Wealth Advisory Group	Cincinnati, Ohio	57.36	-26.25	0.40	-29.86	5.15
343	Wealth Planners	Baton Rouge, La.	57.08	-28.68	0.11	-18.72	-12.25
344	Prudent Money Financial Services	Irving, Texas	55.77	49.56	0.17	13.54	31.73
345	Tampa Asset Management	Tampa, Fla.	55.50	‡	0.58	‡	‡
346	Corbin & Company	Fort Worth, Texas	54.45	0.13	0.61	-2.12	2.30
347	LJ Cooper Capital Management	Orem, Utah	52.12	-22.63	0.37	-28.15	7.69
348	Charleston Financial Advisors	Charleston, S.C.	51.70	-19.82	0.47	-15.49	-5.13
349	Martin Thomas Wealth Management	Palo Alto, Calif.	51.25	‡	0.68	‡	‡
350	Greenspring Wealth Management	Towson, Md.	50.78	34.24	0.48	20.18	11.70
351	Cypress Advisory Services	Houston, Texas	50.18	-6.78	0.88	-14.96	9.62
352	Comprehensive Money Management Services	Coral Gables, Fla.	50.00	25.00	0.77	5.77	18.18

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ASSET CATEGORY: < \$50 MILLION							
353	Gasaway Investment Advisors	Portage, Mich.	49.32	-23.37	0.15	-15.66	-9.14
354	Wealth Management Corporation	Tallahassee, Fla.	48.42	-24.41	0.13	-21.08	-4.22
355	Mueller Financial Solutions	Canon City, Colo.	46.85	-27.33	0.21	-29.32	2.82
356	Cypress Asset Management	Peoria Heights, Ill.	46.09	-13.81	1.12	-20.12	7.89
357	Money Professionals	Pensacola, Fla.	45.89	-11.92	0.39	-15.62	4.39
358	The Personal Wealth Coach	Salado, Texas	44.03	-20.26	0.35	-52.16	66.67
359	CTB Financial Services	St. Louis Park, Minn.	40.00	14.29	0.40	-2.86	17.65
360	Inspired Financial	Huntington Beach, Calif.	40.00	-20.00	0.44	-20.00	0.00
361	Cornerstone Asset Management Services	Parma, Ohio	37.75	-23.39	0.08	-17.26	-7.41
362	Permanent Value	San Diego, Calif.	37.40	-46.57	0.17	-52.51	12.50
363	D. L. Blain & Co.	New Bern, N.C.	37.36	52.65	0.76	33.96	13.95
364	Elderado Financial	Montrose, Colo.	36.03	-0.11	0.18	1.43	-1.52
365	Crow Financial Advisors	Albuquerque, N.M.	30.21	-18.06	0.19	-20.16	2.63
366	The Financial Well	Tampa, Fla.	26.05	-19.71	0.62	-15.88	-4.55
367	DAAT Asset Management	Westlake Village, Calif.	25.00	25.00	0.17	-16.67	50.00
368	David J. Yvars Group	Valhalla, N.Y.	24.49	-75.72	0.12	-76.96	5.38
369	Warburton Capital	Tulsa, Okla.	22.50	28.57	0.22	0.84	27.50
370	Aegis Capital Management	Emeryville, Calif.	21.84	-19.09	0.87	-25.56	8.70
371	Smith Asset Management	Yardley, Pa.	21.49	2.35	0.83	-5.52	8.33
372	Typher Financial Services	Highlands Ranch, Colo.	20.00	11.11	0.50	-2.78	14.29
373	Purtill Financial	Highland Heights, Ohio	13.71	52.83	0.27	16.15	31.58
374	Hudson Capital Management	Ridgewood, N.J.	12.45	0.54	0.36	-31.06	45.83
375	Financial Advisors for Life	San Antonio, Texas	11.20	34.94	0.51	-8.00	46.67
376	Quality Asset Management	Menlo Park, Calif.	10.34	-45.78	0.45	-45.78	0.00
377	Wynn Capital Management	Ben Lomond, Calif.	8.21	0.34	0.22	13.90	-11.90
378	American Tax & Financial Group	Alpharetta, Ga.	3.59	25.09	0.09	-19.81	56.00
379	Farfield Investments and Wealth Management	Columbus, Ohio	3.18	†	0.20	††	
380	Beacon Financial Advisors	Tarrytown, N.Y.	1.00	-50.00	0.03	-47.44	-4.88

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