

FINANCIAL ADVISOR

FA

KNOWLEDGE FOR THE SOBER INVESTOR

July/August 2021 • www.fa-mag.com

SPONSORED BY



RAYMOND JAMES



FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	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.	450,010.40	15.64%	\$31.40	-25.14%	54.48%
2	Edelman Financial Engines	Boston, Mass.	260,100.00	13.58%	\$0.20	10.06%	3.20%
3	First Republic Investment Management	San Francisco, Calif.	106,485.11	22.00%	\$5.25	2.76%	18.72%
4	Global Retirement Partners	San Rafael, Calif.	77,817.09	20.03%	\$14.74	6.75%	12.44%
5	Creative Planning	Overland Park, Kan.	69,482.47	45.00%	\$1.70	8.21%	33.99%
6	Fort Washington Investment Advisors	Cincinnati, Ohio	69,352.58	17.13%	\$138.71	11.28%	5.26%
7	CIBC Private Wealth, US	Atlanta, Ga.	45,888.99	69.51%	\$5.55	61.72%	4.82%
8	Mariner Wealth Advisors	Overland Park, Kan.	34,961.18	18.78%	\$1.53	10.92%	7.08%
9	Fiducient Advisors	Chicago, Ill.	28,304.26	48.04%	\$47.81	11.28%	33.03%
10	Silvercrest Asset Management Group	New York, N.Y.	27,818.59	10.96%	\$34.13	7.56%	3.16%
11	Moneta	St. Louis, Mo.	27,417.70	15.52%	\$5.04	6.27%	8.71%
12	Advanced Capital Group	Minneapolis, Minn.	26,614.69	13.54%	\$89.31	8.97%	4.20%
13	Wealth Enhancement Group	Plymouth, Minn.	24,264.06	75.55%	\$1.03	25.51%	39.87%
14	Segall Bryant & Hamill	Chicago, Ill.	22,890.77	16.43%	\$9.08	8.21%	7.60%
15	BBR Partners	New York, N.Y.	20,707.90	15.77%	\$128.62	7.14%	8.05%
16	Mercer Global Advisors	Denver, Colo.	19,869.91	25.37%	\$1.17	-11.53%	41.70%
17	Pathstone	Boston, Mass.	19,577.07	90.97%	\$19.58	-42.90%	234.45%
18	Buckingham Strategic Wealth	Clayton, Mo.	18,960.00	22.14%	\$1.94	8.90%	12.16%
19	Tiedemann Advisors	New York, N.Y.	18,415.00	6.33%	\$48.21	17.74%	-9.69%
20	1919 Investment Counsel	New York, N.Y.	17,554.38	16.12%	\$8.02	-24.18%	53.15%
21	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	16,408.94	5.78%	\$21.91	1.96%	3.74%
22	Plante Moran Financial Advisors	Southfield, Mich.	16,319.54	-5.53%	\$5.56	-6.78%	1.35%
23	Johnson Investment Counsel	Cincinnati, Ohio	15,525.43	18.35%	\$3.52	0.32%	17.98%
24	Carson Wealth	Omaha, Neb.	15,210.61	21.28%	\$2.81	-23.05%	57.62%
25	Newport Capital Group	Red Bank, N.J.	14,995.73	11.52%	\$73.15	-1.53%	13.26%
26	Boston Private Wealth	Boston, Mass.	14,427.65	8.35%	\$4.52	6.24%	1.98%
27	Aspiriant	Los Angeles, Calif.	13,781.81	-0.88%	\$7.93	-4.42%	3.70%
28	Signature Estate & Investment Advisors	Los Angeles, Calif.	13,632.02	65.52%	\$1.45	46.38%	13.08%
29	The Colony Group	Boston, Mass.	13,054.04	13.01%	\$3.35	9.22%	3.47%
30	LeafHouse Financial	Austin, Texas	12,902.45	34.70%	\$6.77	9.89%	22.57%
31	Wealthspire Advisors	New York, N.Y.	12,715.45	19.52%	\$2.80	-11.55%	35.13%
32	AE Wealth Management	Topeka, Kan.	12,637.10	47.22%	\$0.24	19.22%	23.49%
33	Beacon Pointe Advisors	Newport Beach, Calif.	12,441.99	25.05%	\$2.11	-7.80%	35.63%
34	Cresset	Chicago, Ill.	11,677.08	93.13%	\$12.29	-8.11%	110.18%
35	EP Wealth Advisors	Torrance, Calif.	10,751.30	55.14%	\$1.30	2.80%	50.91%
36	Eaton Vance WaterOak Advisors	Boston, Mass.	10,364.19	33.86%	\$6.61	-24.49%	77.29%
37	WE Family Offices	Miami, Fla.	10,200.64	19.48%	\$118.61	8.37%	10.26%
38	Evercore Wealth Management	New York, N.Y.	10,166.56	10.54%	\$14.97	-0.85%	11.49%
39	Allworth Financial	Sacramento, Calif.	10,118.71	24.99%	\$0.77	6.94%	16.88%
40	myCIO Wealth Partners	Philadelphia, Pa.	9,913.02	11.97%	\$12.10	3.36%	8.33%
41	Mason Investment Advisory Services	Reston, Va.	9,527.64	14.37%	\$13.11	10.12%	3.86%
42	MAI Capital Management	Cleveland, Ohio	9,248.84	29.06%	\$3.56	-23.96%	69.72%
43	Savant Wealth Management	Rockford, Ill.	8,954.58	33.89%	\$1.39	9.06%	22.77%
44	Homrich Berg	Atlanta, Ga.	8,929.22	27.83%	\$4.15	18.91%	7.50%
45	Ballentine Partners	Waltham, Mass.	8,673.38	9.40%	\$36.29	5.74%	3.46%
46	TAG Associates	New York, N.Y.	8,641.47	3.50%	\$78.56	3.50%	0.00%
47	Brighton Jones	Seattle, Wash.	8,443.26	24.17%	\$3.99	6.09%	17.04%
48	RMB Capital	Chicago, Ill.	8,438.73	-2.61%	\$4.46	-7.44%	5.22%
49	GW & Wade	Wellesley, Mass.	8,291.84	23.75%	\$2.65	-1.69%	25.88%
50	Mill Creek Capital Advisors	Conshohocken, Pa.	8,050.91	19.64%	\$23.07	13.13%	5.76%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@susanna-marra.com) at 732-450-8866 ext 24 or susanna@susanna-marra.com.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
51	Americh Massena	Portland, Ore.	7,892.10	9.96%	\$23.77	4.33%	5.40%
52	Lido Advisors	Los Angeles, Calif.	7,692.39	42.36%	\$2.73	2.88%	38.37%
53	CV Advisors	Aventura, Fla.	7,660.77	12.48%	\$90.13	4.54%	7.59%
54	Freestone Capital Management	Seattle, Wash.	7,223.48	33.72%	\$3.46	19.64%	11.76%
55	Bartlett Wealth Management	Cincinnati, Ohio	7,189.17	10.51%	\$3.74	15.97%	-4.71%
56	Brookstone Capital Management	Wheaton, Ill.	7,015.84	137.83%	\$0.21	22.41%	94.29%
57	RSM US Wealth Management	Minneapolis, Minn.	7,011.27	13.01%	\$1.87	11.57%	1.30%
58	Tolleson Private Wealth Management	Dallas, Texas	6,878.35	3.75%	\$38.64	2.58%	1.14%
59	Douglas C. Lane & Associates	New York, N.Y.	6,877.25	9.16%	\$5.66	9.16%	0.00%
60	Wetherby Asset Management	San Francisco, Calif.	6,572.33	15.23%	\$11.35	9.86%	4.89%
61	Monroe Vos Consulting	Houston, Texas	6,541.48	16.26%	\$62.30	9.61%	6.06%
62	Adviser Investments	Newton, Mass.	6,541.32	12.08%	\$1.73	12.85%	-0.68%
63	Valeo Financial Advisors	Carmel, Ind.	6,391.63	29.85%	\$3.55	15.42%	12.50%
64	Ropes Wealth Advisors	Boston, Mass.	6,331.32	26.28%	\$5.48	33.27%	-5.25%
65	Welch & Forbes	Boston, Mass.	6,264.29	12.06%	\$7.68	8.49%	3.29%
66	Conrad Siegel Investment Advisors	Harrisburg, Pa.	6,170.05	6.31%	\$19.90	9.74%	-3.13%
67	Brownson, Rehms & Foxworth	Chicago, Ill.	6,024.77	8.15%	\$14.04	12.69%	-4.03%
68	Altair Advisers	Chicago, Ill.	6,024.31	18.18%	\$17.98	9.72%	7.72%
69	Heck Capital Advisors	Rhineland, Wis.	5,953.45	4.27%	\$5.79	-1.10%	5.43%
70	Northside Capital Management	Hood River, Ore.	5,843.78	23.45%	\$177.08	12.22%	10.00%
71	Gofen and Glossberg	Chicago, Ill.	5,555.83	11.83%	\$5.67	8.52%	3.05%
72	Sequoia Financial Group	Akron, Ohio	5,547.44	20.13%	\$1.49	11.03%	8.19%
73	Joel Isaacson & Co.	New York, N.Y.	5,515.35	15.07%	\$4.81	17.87%	-2.38%
74	Dowling & Yahnke	San Diego, Calif.	5,480.15	15.85%	\$4.09	10.05%	5.27%
75	The Mather Group	Chicago, Ill.	5,424.41	35.99%	\$2.51	-8.06%	47.91%
76	BDF	Itasca, Ill.	5,366.48	16.79%	\$3.74	10.19%	5.99%
77	Forum Financial Management	Lombard, Ill.	5,365.78	17.98%	\$1.34	12.82%	4.58%
78	Arlington Partners	Birmingham, Ala.	5,314.49	-1.98%	\$38.23	-13.97%	13.93%
79	Greenspring Advisors	Towson, Md.	5,248.23	11.92%	\$8.99	-6.28%	19.43%
80	RegentAtlantic	Morristown, N.J.	5,156.33	5.21%	\$3.02	1.70%	3.46%
81	Plancorp	St. Louis, Mo.	5,067.86	11.62%	\$3.72	6.95%	4.37%
82	HBKS Wealth Advisors	Erie, Pa.	5,053.26	35.88%	\$0.91	31.65%	3.21%
83	BJOS	San Francisco, Calif.	5,023.10	8.55%	\$5.59	11.93%	-3.02%
84	Clarfeld Financial Advisors	Tarrytown, N.Y.	5,018.04	19.95%	\$6.10	1.13%	18.61%
85	Modera Wealth Management	Westwood, N.J.	4,957.47	80.52%	\$2.60	32.67%	36.07%
86	Bradley, Foster & Sargent	Hartford, Conn.	4,879.42	15.13%	\$3.20	10.45%	4.23%
87	RGT Wealth Advisors	Dallas, Texas	4,860.32	12.11%	\$7.75	2.99%	8.85%
88	The Caprock Group	Boise, Idaho	4,738.61	30.36%	\$31.59	14.72%	13.64%
89	GYL Financial Synergies	West Hartford, Conn.	4,733.25	11.05%	\$3.51	10.48%	0.52%
90	Geller Advisors	New York, N.Y.	4,607.00	29.39%	\$38.71	4.38%	23.96%
91	TCG Advisory Services	Austin, Texas	4,601.95	-27.36%	\$2.08	-41.64%	24.46%
92	Avantax Planning Partners	Dubuque, Iowa	4,592.46	12.91%	\$1.03	12.10%	0.72%
93	Finaccess Advisors	Miami, Fla.	4,591.32	-2.55%	\$45.91	-18.14%	19.05%
94	Brightworth	Atlanta, Ga.	4,585.31	13.66%	\$2.91	7.02%	6.20%
95	SignatureFD	Atlanta, Ga.	4,578.00	17.05%	\$3.29	6.95%	9.44%
96	Retirement Planners of America	Plano, Texas	4,472.59	-8.51%	\$0.52	-5.40%	-3.29%
97	Bailard	Foster City, Calif.	4,419.85	12.76%	\$5.46	8.31%	4.11%
98	Pension Consultants	Springfield, Mo.	4,383.80	15.09%	\$38.45	14.08%	0.88%
99	WMS Partners	Towson, Md.	4,368.46	10.40%	\$10.25	-5.93%	17.36%
100	Edge Capital Group	Atlanta, Ga.	4,322.97	6.21%	\$16.13	2.25%	3.88%
101	Coldstream Wealth Management	Bellevue, Wash.	4,322.47	10.10%	\$2.85	0.67%	9.37%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@susanna-marra.com) at 732-450-8866 ext 24 or susanna@susanna-marra.com.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
102	Litman Gregory Asset Management	Walnut Creek, Calif.	4,319.50	-2.72%	\$8.57	-5.42%	2.86%
103	Wipfli Financial Advisors	Milwaukee, Wis.	4,278.51	18.23%	\$2.22	17.01%	1.05%
104	Index Fund Advisors	Irvine, Calif.	4,132.88	2.23%	\$1.76	7.06%	-4.51%
105	Carroll Financial Associates	Charlotte, N.C.	4,085.36	17.19%	\$0.73	4.68%	11.96%
106	Fort Pitt Capital Group	Pittsburgh, Pa.	4,058.23	14.92%	\$1.50	12.79%	1.89%
107	Wilbanks, Smith & Thomas Asset Management	Norfolk, Va.	4,014.21	14.44%	\$1.80	0.06%	14.38%
108	Zhang Financial	Portage, Mich.	4,003.18	24.41%	\$0.86	16.55%	6.75%
109	Douglass Winthrop Advisors	New York, N.Y.	4,002.15	22.57%	\$3.82	7.03%	14.52%
110	Crestwood Advisors Group	Boston, Mass.	3,963.02	20.38%	\$4.77	11.55%	7.92%
111	Ingalls & Snyder	New York, N.Y.	3,930.24	-0.94%	\$1.01	5.17%	-5.81%
112	Advisors Capital Management	Ridgewood, N.J.	3,883.91	21.51%	\$1.18	10.34%	10.12%
113	Allegheny Financial Group	Pittsburgh, Pa.	3,879.48	13.62%	\$0.99	5.62%	7.57%
114	Truepoint Wealth Counsel	Cincinnati, Ohio	3,864.68	14.44%	\$2.67	-16.61%	37.23%
115	Badgley Phelps Wealth Managers	Seattle, Wash.	3,818.38	19.49%	\$4.81	8.05%	10.58%
116	Parallel Advisors	San Francisco, Calif.	3,811.59	20.29%	\$1.58	11.15%	8.22%
117	Northeast Financial Consultants	Westport, Conn.	3,811.07	14.80%	\$16.36	11.35%	3.10%
118	JMG Financial Group	Downers Grove, Ill.	3,788.00	13.86%	\$3.28	3.30%	10.22%
119	Annex Wealth Management	Elm Grove, Wis.	3,785.32	46.00%	\$0.71	26.99%	14.97%
120	Frontier Investment Management Company	Dallas, Texas	3,770.43	17.85%	\$1.75	-1.39%	19.51%
121	Camden Capital	El Segundo, Calif.	3,770.23	-8.73%	\$10.93	-9.79%	1.17%
122	Abacus Wealth Partners	Santa Monica, Calif.	3,750.00	37.56%	\$2.25	29.33%	6.37%
123	Mission Wealth Management	Santa Barbara, Calif.	3,725.61	44.64%	\$2.27	8.62%	33.17%
124	Crescent Grove Advisors	Lake Forest, Ill.	3,695.57	8.23%	\$13.49	2.31%	5.79%
125	Cassaday & Company	McLean, Va.	3,682.69	12.27%	\$1.31	-17.79%	36.57%
126	Covington Capital Management	Los Angeles, Calif.	3,584.28	40.19%	\$8.32	59.38%	-12.04%
127	Clifford Swan Investment Counselors	Pasadena, Calif.	3,534.00	8.60%	\$3.91	-5.47%	14.89%
128	Inverness Counsel	New York, N.Y.	3,528.61	-8.36%	\$7.52	-9.92%	1.74%
129	Kovack Advisors	Fort Lauderdale, Fla.	3,518.59	21.49%	\$0.41	21.51%	-0.01%
130	Prio Wealth	Boston, Mass.	3,516.71	36.31%	\$5.24	30.01%	4.84%
131	F.L.Putnam Investment Management Company	Wellesley, Mass.	3,487.49	25.21%	\$3.36	9.06%	14.81%
132	Bordeaux Wealth Advisors	Menlo Park, Calif.	3,470.10	52.47%	\$21.82	21.78%	25.20%
133	Grimes & Company	Westborough, Mass.	3,459.68	19.30%	\$1.21	9.94%	8.51%
134	Advance Capital Management	Southfield, Mich.	3,451.07	16.77%	\$0.57	11.72%	4.52%
135	Parsec Financial	Asheville, N.C.	3,427.81	14.56%	\$1.87	11.94%	2.34%
136	Mainstay Capital Management	Grand Blanc, Mich.	3,419.80	27.81%	\$0.92	25.07%	2.19%
137	Berman Capital Advisors	Atlanta, Ga.	3,340.18	22.83%	\$13.80	5.07%	16.91%
138	Warren Averett Asset Management	Birmingham, Ala.	3,291.01	21.17%	\$2.57	15.58%	4.84%
139	Cary Street Partners Investment Advisory	Richmond, Va.	3,254.68	67.69%	\$1.05	N/A	N/A
140	Gradient Investments	Arden Hills, Minn.	3,237.74	25.22%	\$0.21	12.52%	11.29%
141	Destination Wealth Management	Walnut Creek, Calif.	3,226.54	17.23%	\$1.69	10.35%	6.24%
142	Telemus Capital	Southfield, Mich.	3,197.31	4.50%	\$1.99	-18.69%	28.51%
143	TCI Wealth Advisors	Tucson, Ariz.	3,182.07	7.02%	\$1.36	5.05%	1.87%
144	Westmount Asset Management	Los Angeles, Calif.	3,118.54	1.82%	\$2.36	2.36%	-0.53%
145	Crestone Capital	Boulder, Colo.	3,110.88	5.46%	\$28.03	-6.89%	13.27%
146	Heritage Investors Management Corp.	Bethesda, Md.	3,083.05	10.43%	\$4.39	11.37%	-0.85%
147	Pure Financial Advisors	San Diego, Calif.	3,070.77	17.57%	\$1.08	1.63%	15.69%
148	Frontier Wealth Management	Kansas City, Mo.	3,052.31	24.93%	\$1.61	7.38%	16.35%
149	CM Wealth Advisors	Beachwood, Ohio	3,036.99	3.38%	\$17.86	0.34%	3.03%
150	Matter Family Office	St. Louis, Mo.	3,026.00	3.99%	\$16.36	1.18%	2.78%
151	Budros, Ruhlin & Roe	Columbus, Ohio	3,019.51	10.50%	\$3.80	5.63%	4.61%
152	Hamilton Capital	Columbus, Ohio	2,911.02	3.46%	\$1.23	-1.08%	4.58%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@fa-mag.com) at 732-450-8866 ext 24 or susanna@fa-mag.com.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
153	Lake Street Advisors	Portsmouth, N.H.	2,910.53	57.26%	\$52.92	48.68%	5.77%
154	TFO-TDC	Maumee, Ohio	2,899.44	13.87%	\$2.06	9.57%	3.92%
155	TFO Phoenix	Phoenix, Ariz.	2,891.34	-15.20%	\$17.42	-6.01%	-9.78%
156	JFS Wealth Advisors	Hermitage, Pa.	2,805.31	8.76%	\$1.33	6.44%	2.18%
157	GM Advisory Group	Melville, N.Y.	2,804.04	33.01%	\$5.48	17.16%	13.53%
158	Palladium Registered Investment Advisors	Norfolk, Va.	2,788.51	10.12%	\$2.63	4.21%	5.67%
159	Wellesley Asset Management	Wellesley, Mass.	2,786.28	11.93%	\$1.68	9.63%	2.09%
160	Coastal Bridge Advisors	Westport, Conn.	2,774.61	32.19%	\$9.57	28.09%	3.20%
161	HoyleCohen††	San Diego, Calif.	2,766.23	42.85%	\$2.31	39.28%	2.56%
162	Halbert Hargrove Global Advisors	Long Beach, Calif.	2,762.89	8.80%	\$4.05	4.17%	4.44%
163	Klingman & Associates	New York, N.Y.	2,700.57	27.09%	\$5.56	14.54%	10.96%
164	Fairview Capital Investment Management	Greenbrae, Calif.	2,678.92	13.92%	\$13.39	5.37%	8.11%
165	Chicago Capital	Chicago, Ill.	2,678.32	31.04%	\$5.19	17.83%	11.21%
166	Accredited Investors Wealth Management	Edina, Minn.	2,675.83	16.47%	\$4.87	8.40%	7.44%
167	Family Management Corporation	New York, N.Y.	2,627.20	27.67%	\$3.89	20.50%	5.96%
168	Capital Wealth Planning	Naples, Fla.	2,610.57	46.41%	\$0.53	7.27%	36.49%
169	Carlson Capital Management	Northfield, Minn.	2,596.42	14.12%	\$2.32	8.01%	5.66%
170	CG Advisory Services	Haslett, Mich.	2,584.05	15.62%	\$0.27	-7.08%	24.43%
171	Sage Financial Group	Conshohocken, Pa.	2,557.40	17.71%	\$3.79	12.47%	4.65%
172	Barrett Asset Management	New York, N.Y.	2,516.31	18.41%	\$2.69	-13.88%	37.50%
173	SJS Investment Services	Sylvania, Ohio	2,510.11	14.11%	\$3.09	6.95%	6.69%
174	Beaumont Financial Partners	Needham, Mass.	2,452.73	10.33%	\$4.91	5.92%	4.17%
175	Wescott Financial Advisory Group	Philadelphia, Pa.	2,440.47	15.09%	\$4.73	11.07%	3.61%
176	Private Ocean Wealth Management	San Rafael, Calif.	2,439.11	6.30%	\$2.45	9.19%	-2.64%
177	AGW Capital Advisors	Tampa, Fla.	2,426.25	13.83%	\$24.26	1.31%	12.36%
178	Evensky Katz	Coral Gables, Fla.	2,366.37	12.89%	\$2.24	3.81%	8.74%
179	True North Advisors	Dallas, Texas	2,338.10	46.01%	\$4.00	38.51%	5.42%
180	G.W. Henssler & Associates	Kennesaw, Ga.	2,337.12	11.03%	\$1.85	-9.15%	22.22%
181	Radnor Financial Advisors	Wayne, Pa.	2,331.77	24.62%	\$4.55	10.77%	12.50%
182	Wealthcare Capital Management	Richmond, Va.	2,314.46	33.16%	\$0.58	21.55%	9.55%
183	One Capital Management	Westlake Village, Calif.	2,285.78	42.15%	\$1.68	4.60%	35.90%
184	Bragg Financial Advisors	Charlotte, N.C.	2,272.12	27.97%	\$1.72	16.71%	9.65%
185	Morton Capital Management	Calabasas, Calif.	2,210.88	8.56%	\$2.19	5.23%	3.16%
186	Greenwich Wealth Management	Greenwich, Conn.	2,197.15	49.95%	\$12.34	37.32%	9.20%
187	Resource Consulting Group	Orlando, Fla.	2,193.42	8.03%	\$4.63	4.16%	3.72%
188	MCF Advisors	Covington, Ky.	2,168.28	16.09%	\$3.02	-0.59%	16.78%
189	IFG Advisory	Atlanta, Ga.	2,159.83	19.20%	\$0.34	-3.00%	22.88%
190	Chesley, Taft & Associates	Chicago, Ill.	2,146.05	10.41%	\$5.96	10.11%	0.28%
191	Retirement Income Solutions	Ann Arbor, Mich.	2,130.78	8.35%	\$1.77	8.17%	0.17%
192	LaSalle St. Investment Advisors	Elmhurst, Ill.	2,130.20	22.53%	\$0.57	11.40%	9.99%
193	Schneider Downs Wealth Management Advisors	Pittsburgh, Pa.	2,114.94	16.34%	\$3.18	8.29%	7.43%
194	Axxcess Wealth Management	Carlsbad, Calif.	2,096.68	62.95%	\$0.33	-47.91%	212.84%
195	Covenant	San Antonio, Texas	2,058.69	13.48%	\$3.79	5.33%	7.74%
196	Texas Yale Capital Corp	St Petersburg, Fla.	2,045.43	6.95%	\$19.12	5.95%	0.94%
197	Courier Capital	Buffalo, N.Y.	2,044.05	7.09%	\$2.53	5.37%	1.64%
198	AJ Wealth	New York, N.Y.	2,037.00	37.36%	\$8.45	24.25%	10.55%
199	Altium Wealth Management	Purchase, N.Y.	2,027.00	21.52%	\$2.31	19.72%	1.51%
200	Smith Salley & Associates	Greensboro, N.C.	2,026.64	19.82%	\$3.26	9.20%	9.72%
201	RINET Company	Boston, Mass.	2,022.90	3.99%	\$10.70	2.34%	1.61%
202	Miracle Mile Advisors	Los Angeles, Calif.	2,012.82	36.41%	\$2.90	11.68%	22.14%
203	Baker Avenue Wealth Management	San Francisco, Calif.	2,006.00	12.32%	\$2.90	10.20%	1.92%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020. ††Correction to 2019 AUM due to reporting error by firm.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@susanna-marra.com) at 732-450-8866 ext 24 or susanna@susanna-marra.com.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
204	Constellation Wealth Advisors	Cincinnati, Ohio	2,005.65	35.88%	\$7.80	11.56%	21.80%
205	The Portfolio Strategy Group	White Plains, N.Y.	1,980.35	7.67%	\$5.23	4.54%	2.99%
206	Obermeyer Wood Investment Counsel	Aspen, Colo.	1,965.00	27.93%	\$3.57	22.11%	4.76%
207	Summitry	Foster City, Calif.	1,958.10	11.04%	\$1.73	11.24%	-0.18%
208	West Financial Services	McLean, Va.	1,942.51	13.15%	\$2.39	9.40%	3.43%
209	Regal Investment Advisors	Kentwood, Mich.	1,936.64	32.28%	\$0.29	30.92%	1.04%
210	The Welch Group	Birmingham, Ala.	1,910.59	8.63%	\$1.73	-0.83%	9.54%
211	CoastEdge Partners	La Jolla, Calif.	1,901.93	10.73%	\$18.47	-8.62%	21.18%
212	Beirne Wealth Consulting Services	Shelton, Conn.	1,895.17	7.45%	\$5.21	14.53%	-6.19%
213	RTD Financial Advisors	Philadelphia, Pa.	1,877.02	15.59%	\$3.01	12.07%	3.14%
214	Farr Miller & Washington	Washington, D.C.	1,872.20	0.42%	\$3.08	-4.38%	5.02%
215	Reilly Financial Advisors	La Mesa, Calif.	1,863.72	2.98%	\$1.69	-8.72%	12.82%
216	6 Meridian	Wichita, Kan.	1,854.14	3.12%	\$2.81	-1.42%	4.60%
217	Fairway Wealth Management	Independence, Ohio	1,847.01	14.19%	\$7.39	8.71%	5.04%
218	Capstone Financial Advisors	Downers Grove, Ill.	1,836.63	11.82%	\$3.47	8.01%	3.52%
219	Heritage Financial Services	Westwood, Mass.	1,825.00	13.99%	\$1.87	10.02%	3.61%
220	Magnus Financial Group	New York, N.Y.	1,819.79	15.27%	\$2.70	4.51%	10.29%
221	McKinley Carter Wealth Services	Wheeling, W.Va.	1,814.68	42.62%	\$1.07	-20.36%	79.07%
222	Ritholtz Wealth Management	New York, N.Y.	1,806.28	39.09%	\$1.24	6.27%	30.88%
223	Colorado Financial Management	Boulder, Colo.	1,803.38	14.36%	\$2.45	10.15%	3.81%
224	Financial Advisory Service	Leawood, Kan.	1,793.86	26.28%	\$1.59	7.76%	17.19%
225	Certified Financial Group	Altamonte Springs, Fla.	1,787.05	18.26%	\$0.87	11.81%	5.77%
226	Osborne Partners Capital Management	San Francisco, Calif.	1,763.07	8.00%	\$3.09	3.84%	4.01%
227	Resource Management	Metairie, La.	1,750.00	51.80%	\$3.18	44.90%	4.76%
228	Vigilant Capital Management	Portland, Maine	1,746.26	25.73%	\$4.15	11.40%	12.87%
229	Foundations Investment Advisors	Phoenix, Ariz.	1,744.12	69.67%	\$0.22	8.24%	56.75%
230	Legacy Wealth Management	Memphis, Tenn.	1,737.54	16.79%	\$1.59	16.79%	0.00%
231	Foster & Motley	Cincinnati, Ohio	1,727.15	12.45%	\$2.51	7.55%	4.56%
232	Artemis Wealth Advisors	New York, N.Y.	1,722.63	18.34%	\$114.84	18.34%	0.00%
233	EFS Advisors	Cambridge, Minn.	1,720.09	20.79%	\$0.10	6.62%	13.29%
234	Biltmore Family Office	Charlotte, N.C.	1,712.27	32.33%	\$25.56	8.63%	21.82%
235	Robertson Stephens Wealth Management	San Francisco, Calif.	1,707.54	42.43%	\$4.94	3.32%	37.85%
236	CFS Investment Advisory Services	Totowa, N.J.	1,704.25	16.69%	\$3.41	10.85%	5.26%
237	CPS Investment Advisors	Lakeland, Fla.	1,702.43	16.58%	\$0.63	-0.08%	16.67%
238	BLB&B Advisors	Montgomeryville, Pa.	1,688.44	18.78%	\$1.45	10.11%	7.88%
239	Windsor Wealth Management	Indianapolis, Ind.	1,680.16	15.81%	\$1.83	7.99%	7.23%
240	SFMG Wealth Advisors	Plano, Texas	1,668.45	7.88%	\$2.75	4.85%	2.89%
241	Glassman Wealth Services	Vienna, Va.	1,662.30	14.29%	\$5.50	4.07%	9.82%
242	Apella Capital	Glastonbury, Conn.	1,662.00	91.25%	\$0.83	72.84%	10.66%
243	Capital Wealth Advisors	Naples, Fla.	1,661.88	6.16%	\$1.51	5.10%	1.01%
244	Guyasuta Investment Advisors	Pittsburgh, Pa.	1,634.88	16.37%	\$4.30	11.78%	4.11%
245	Krilogy	Creve Coeur, Mo.	1,617.06	25.68%	\$0.87	16.90%	7.51%
246	Strategic Financial Services	Utica, N.Y.	1,582.08	16.33%	\$1.50	13.25%	2.72%
247	BerganKDV Wealth Management	Bloomington, Minn.	1,563.30	13.36%	\$1.84	24.43%	-8.90%
248	Stonebridge Capital Advisors	Saint Paul, Minn.	1,544.77	4.73%	\$1.29	-8.36%	14.29%
249	CapTrust Financial Advisors	Holland, Mich.	1,517.45	5.07%	\$1.92	0.42%	4.63%
250	LBMC Investment Advisors	Brentwood, Tenn.	1,516.62	13.21%	\$3.41	4.82%	8.01%
251	ProVise Management Group	Clearwater, Fla.	1,515.64	0.38%	\$1.17	-10.93%	12.70%
252	Pinnacle Wealth Planning Services	Mansfield, Ohio	1,502.39	10.31%	\$1.91	3.31%	6.78%
253	Altvest Personal Wealth Management	New York, N.Y.	1,500.25	14.09%	\$2.36	9.60%	4.10%
254	Prosperity Capital Advisors	Westlake, Ohio	1,487.45	21.57%	\$0.46	16.85%	4.03%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@susanna-marra.com) at 732-450-8866 ext 24 or susanna@susanna-marra.com.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
255	Ashfield Capital Partners	San Francisco, Calif.	1,483.64	22.73%	\$8.73	19.12%	3.03%
256	Cabana Asset Management	Fayetteville, Ark.	1,481.53	45.76%	\$0.20	4.05%	40.09%
257	Sadoff Investment Management	Milwaukee, Wis.	1,473.94	0.93%	\$2.41	5.39%	-4.23%
258	Abacus Planning Group	Columbia, S.C.	1,452.69	12.86%	\$5.12	-0.25%	13.15%
259	Frank, Rimerman Advisors	Palo Alto, Calif.	1,450.31	3.73%	\$14.50	3.73%	0.00%
260	Conservest Capital Advisors	Wynnewood, Pa.	1,436.11	32.73%	\$6.16	28.74%	3.10%
261	Cornerstone Advisory	Hunt Valley, Md.	1,429.41	7.16%	\$1.99	18.47%	-9.55%
262	Albion Financial Group	Salt Lake City, Utah	1,427.28	19.26%	\$1.65	-0.87%	20.31%
263	Transform Wealth	Greenwood Village, Colo.	1,400.90	13.59%	\$0.82	-17.95%	38.44%
264	Ensemble Capital Management	Burlingame, Calif.	1,399.26	38.44%	\$5.71	14.14%	21.29%
265	Polaris Wealth Advisory Group	San Rafael, Calif.	1,392.90	19.97%	\$1.16	0.13%	19.82%
266	Main Street Research	Sausalito, Calif.	1,389.97	32.37%	\$2.53	68.47%	-21.43%
267	Kings Point Capital Management	Great Neck, N.Y.	1,370.44	26.76%	\$5.50	19.12%	6.41%
268	Condor Capital Wealth Management	Martinsville, N.J.	1,350.92	15.78%	\$1.88	14.49%	1.13%
269	Investment Counsel Company	Las Vegas, Nev.	1,350.89	27.77%	\$5.61	30.42%	-2.03%
270	Wealthquest	Cincinnati, Ohio	1,348.24	16.37%	\$1.03	8.14%	7.61%
271	ML&R Wealth Management	Austin, Texas	1,336.62	21.01%	\$2.44	11.74%	8.30%
272	Bloom Advisors	Farmington Hills, Mich.	1,327.65	11.37%	\$1.10	12.39%	-0.91%
273	Meyer Capital Group	Marlton, N.J.	1,326.36	31.98%	\$1.77	24.76%	5.78%
274	Inspire Investing	Hollister, Calif.	1,314.26	107.10%	\$2.78	105.35%	0.85%
275	Daintree Advisors	Boston, Mass.	1,311.91	13.95%	\$4.93	6.67%	6.83%
276	UMA Financial Services	Salt Lake City, Utah	1,310.30	7.06%	\$1.31	4.38%	2.56%
277	Van Hulzen Asset Management	El Dorado Hills, Calif.	1,309.15	18.99%	\$1.48	14.02%	4.35%
278	Marcum Wealth	Cleveland, Ohio	1,292.45	28.48%	\$0.80	12.50%	14.21%
279	Durbin Bennett Private Wealth Management	Austin, Texas	1,285.83	6.25%	\$4.40	-19.95%	32.73%
280	RZH Advisors	Stamford, Conn.	1,285.64	30.68%	\$8.81	21.73%	7.35%
281	Wright Investors' Service	Shelton, Conn.	1,277.48	3.09%	\$13.31	12.75%	-8.57%
282	XML Financial Group	Rockville, Md.	1,271.69	16.49%	\$0.90	8.68%	7.18%
283	Beaird Harris Wealth Management	Dallas, Texas	1,262.07	8.04%	\$1.86	-2.94%	11.31%
284	Baltimore Washington Financial Advisors	Columbia, Md.	1,250.00	31.58%	\$1.92	61.94%	-18.75%
285	R W Investment Management	Boise, Idaho	1,246.72	87.80%	\$1.52	9.28%	71.85%
286	United Asset Strategies	Garden City, N.Y.	1,227.60	14.76%	\$1.15	-3.02%	18.33%
287	Novare Capital Management	Charlotte, N.C.	1,224.69	5.32%	\$3.21	-55.61%	137.27%
288	Maple Capital Management	Montpelier, Vt.	1,207.95	17.19%	\$1.45	9.85%	6.68%
289	TFC Financial Management	Boston, Mass.	1,206.83	11.53%	\$3.38	8.09%	3.18%
290	Diversified Portfolios	Bloomfield Hills, Mich.	1,203.10	16.29%	\$2.31	9.58%	6.12%
291	Acorn Financial Services	Reston, Va.	1,193.43	24.74%	\$0.71	13.23%	10.17%
292	Per Stirling Capital Management	Austin, Texas	1,176.80	24.93%	\$1.03	14.58%	9.03%
293	Austin Asset	Austin, Texas	1,176.80	13.19%	\$3.01	10.58%	2.36%
294	Intersect Capital	San Ramon, Calif.	1,169.44	20.01%	\$2.71	16.67%	2.86%
295	Column Capital Advisors	Indianapolis, Ind.	1,161.75	14.59%	\$3.34	10.97%	3.26%
296	Nadler Financial Group	Deerfield, Ill.	1,158.20	12.17%	\$1.46	8.91%	2.99%
297	Sheaff Brock Investment Advisors	Indianapolis, Ind.	1,150.92	10.97%	\$1.10	17.66%	-5.69%
298	3EDGE Asset Management	Boston, Mass.	1,149.79	27.91%	\$2.78	-30.63%	84.38%
299	Bogart Wealth	McLean, Va.	1,138.82	20.13%	\$1.48	-3.33%	24.27%
300	Narwhal Capital Management	Marietta, Ga.	1,137.16	19.44%	\$63.18	-0.46%	20.00%
301	Paragon Capital Management	Denver, Colo.	1,115.93	36.65%	\$7.49	40.31%	-2.61%
302	Valley National Financial Advisors	Bethlehem, Pa.	1,105.56	7.47%	\$0.51	5.53%	1.84%
303	Edgemoor Investment Advisors	Bethesda, Md.	1,101.52	3.24%	\$2.88	2.97%	0.26%
304	Romano Wealth Management	Evanston, Ill.	1,093.37	11.68%	\$1.50	4.16%	7.23%
305	SAX Wealth Advisors	Parsippany, N.J.	1,093.24	8.89%	\$1.51	8.44%	0.42%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@saxmag.com) at 732-450-8866 ext 24 or susanna@saxmag.com.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
306	SilverOak Wealth Management	Edina, Minn.	1,078.95	13.50%	\$3.32	8.61%	4.50%
307	BT Wealth Management	Atlanta, Ga.	1,065.55	3.88%	\$3.16	-3.52%	7.67%
308	Azzad Asset Management	Falls Church, Va.	1,063.57	30.91%	\$0.84	13.36%	15.48%
309	The Advisory Group of San Francisco	San Francisco, Calif.	1,061.67	29.69%	\$6.64	32.93%	-2.44%
310	Bitterroot Capital Advisors	Bozeman, Mont.	1,060.50	13.39%	\$70.70	13.39%	0.00%
311	Intelligence Driven Advisers	Carlsbad, Calif.	1,060.38	19.83%	\$1.06	5.76%	13.30%
312	Zuckerman Investment Group	Chicago, Ill.	1,048.35	10.76%	\$3.49	10.76%	0.00%
313	Sather Financial Group	Victoria, Texas	1,048.18	25.83%	\$2.47	10.73%	13.64%
314	Madison Wealth Management	Cincinnati, Ohio	1,040.84	15.88%	\$2.12	12.81%	2.73%
315	Aveo Capital Partners	Greenwood Village, Colo.	1,027.75	55.72%	\$0.93	40.74%	10.64%
316	Avitas Wealth Management	Century City, Calif.	1,025.42	20.06%	\$4.77	10.57%	8.59%
317	Telos Capital Management	San Diego, Calif.	1,017.49	30.97%	\$1.36	19.43%	9.66%
318	BigSur Partners	Miami, Fla.	1,014.27	0.66%	\$50.71	-4.37%	5.26%
319	Palisade Asset Management	Minneapolis, Minn.	1,014.06	8.89%	\$4.51	143.91%	-55.36%
320	Weatherly Asset Management	Del Mar, Calif.	1,012.08	15.59%	\$2.86	13.96%	1.43%
321	Smith Anglin Financial	Dallas, Texas	1,001.70	22.76%	\$0.99	7.06%	14.67%
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION							
322	AlphaCore Capital	La Jolla, Calif.	998.27	136.01%	\$1.31	46.43%	61.18%
323	Cardan Capital Partners	Denver, Colo.	992.50	5.43%	\$2.65	2.90%	2.46%
324	Quadrant Private Wealth	Bethlehem, Pa.	991.91	42.47%	\$1.57	-14.07%	65.79%
325	TrinityPoint Wealth	Milford, Conn.	990.22	18.28%	\$1.30	9.92%	7.61%
326	Professional Planning Group	Westerly, R.I.	971.75	8.53%	\$0.56	5.26%	3.10%
327	Retirement Investment Advisors	Oklahoma City, Okla.	959.96	17.67%	\$0.77	15.30%	2.05%
328	Woodmont Investment Counsel	Nashville, Tenn.	958.60	13.98%	\$3.20	37.54%	-17.13%
329	Richard P. Slaughter Associates	Austin, Texas	955.45	26.11%	\$2.25	18.69%	6.25%
330	SPC Financial	Rockville, Md.	955.13	20.89%	\$0.85	10.42%	9.48%
331	Rollins Financial	Atlanta, Ga.	953.82	41.38%	\$1.07	31.24%	7.72%
332	BFSG	Irvine, Calif.	950.89	11.33%	\$1.20	4.86%	6.17%
333	Cahaba Wealth Management	Atlanta, Ga.	949.97	22.85%	\$1.67	-5.05%	29.38%
334	PDS Planning	Dublin, Ohio	941.73	38.04%	\$1.60	27.95%	7.89%
335	CJM Wealth Advisers	Fairfax, Va.	941.62	5.15%	\$1.30	15.18%	-8.70%
336	Traphagen Investment Advisors	Oradell, N.J.	922.27	17.58%	\$0.65	7.50%	9.37%
337	Diversified Lifelong Advisors	Wilmington, Del.	914.78	80.10%	\$0.92	24.60%	44.54%
338	Delta Financial Group	Basking Ridge, N.J.	911.50	21.33%	\$1.29	11.02%	9.29%
339	Allegiant Private Advisors†	Sarasota, Fla.	911.10	N/A	\$1.92	N/A	N/A
340	Burton Enright Welch	Walnut Creek, Calif.	904.84	20.42%	\$2.10	13.42%	6.17%
341	Delegate Advisors	Chapel Hill, N.C.	903.33	11.37%	\$29.14	4.18%	6.90%
342	Segment Wealth Management	Houston, Texas	902.83	17.46%	\$4.65	12.61%	4.30%
343	Mayflower Advisors†	Boston, Mass.	901.62	N/A	\$0.84	N/A	N/A
344	Kowal Investment Group	Waukesha, Wis.	900.00	12.50%	\$0.82	2.27%	10.00%
345	Agili	Richmond, Va.	884.59	16.29%	\$2.82	12.59%	3.29%
346	Apriem Advisors	Irvine, Calif.	875.93	15.22%	\$1.32	11.57%	3.28%
347	Financial Planning and Information Services	De Pere, Wis.	874.39	13.34%	\$0.85	10.79%	2.30%
348	Patton, Albertson, Miller Group	Chattanooga, Tenn.	871.48	6.06%	\$1.87	3.56%	2.41%
349	Beacon Financial Group	Dallas, Texas	865.00	8.40%	\$1.11	5.48%	2.76%
350	Blue Chip Partners	Farmington Hills, Mich.	862.03	12.26%	\$1.64	2.04%	10.02%
351	Petersen Hastings Investment Management	Kennewick, Wash.	838.01	8.85%	\$1.09	2.07%	6.65%
352	Soundmark Wealth Management	Kirkland, Wash.	831.67	7.84%	\$1.62	5.32%	2.40%
353	Stepp & Rothwell	Overland Park, Kan.	831.56	20.01%	\$3.08	16.90%	2.66%
354	Titleist Asset Management	San Antonio, Texas	831.19	54.79%	\$0.81	31.64%	17.59%
355	Red Door Wealth Management	Memphis, Tenn.	824.32	28.40%	\$1.94	18.71%	8.16%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@susanna-marra.com) at 732-450-8866 ext 24 or susanna@susanna-marra.com.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
356	REDW Wealth	Albuquerque, N.M.	822.83	9.16%	\$2.29	8.25%	0.84%
357	Fusion Family Wealth	Woodbury, N.Y.	818.00	21.01%	\$3.00	12.58%	7.48%
358	Woodard & Company Asset Management Group	Bermuda Run, N.C.	813.80	13.45%	\$0.54	39.93%	-18.92%
359	Archford	Swansea, Ill.	810.35	23.28%	\$1.41	31.63%	-6.34%
360	Seasons of Advice Wealth Management	New York, N.Y.	805.21	21.65%	\$1.09	18.68%	2.50%
361	Medley & Brown	Ridgeland, Miss.	803.32	2.10%	\$1.54	1.51%	0.58%
362	Triad Financial Advisors	Greensboro, N.C.	802.32	11.38%	\$1.14	8.21%	2.94%
363	Investment Security Group	Denver, Colo.	800.00	7.96%	\$1.07	0.76%	7.14%
364	Versant Capital Management	Phoenix, Ariz.	796.43	3.08%	\$1.80	0.75%	2.31%
365	DiNuzzo Private Wealth	Beaver, Pa.	795.00	1.89%	\$1.04	0.56%	1.32%
366	Steigerwald, Gordon & Koch Wealth Advisors	Leesburg, Va.	790.00	9.12%	\$1.65	9.12%	0.00%
367	Janiczek Wealth Management	Denver, Colo.	780.15	15.56%	\$5.78	7.00%	8.00%
368	Vintage Financial Services	Ann Arbor, Mich.	779.24	11.91%	\$1.50	10.83%	0.97%
369	HCM Wealth Advisors	Cincinnati, Ohio	767.90	8.47%	\$1.11	10.83%	-2.13%
370	New England Investment & Retirement Group	North Andover, Mass.	765.98	16.94%	\$1.01	13.25%	3.26%
371	Aufman Associates	Sewickley, Pa.	764.08	5.66%	\$3.47	3.26%	2.33%
372	Hemington Wealth Management	Falls Church, Va.	755.90	-14.66%	\$1.94	0.22%	-14.85%
373	Marshall Financial Group	Doylestown, Pa.	747.72	12.05%	\$1.62	12.05%	0.00%
374	Moisand Fitzgerald Tamayo	Orlando, Fla.	742.76	14.20%	\$1.21	9.72%	4.08%
375	Financial Advisory Corporation	Grand Rapids, Mich.	731.26	7.79%	\$3.48	-4.53%	12.90%
376	WPWealth	Fort Worth, Texas	726.01	16.87%	\$1.79	5.61%	10.66%
377	Blankinship & Foster	Solana Beach, Calif.	722.23	19.88%	\$2.44	6.11%	12.98%
378	Yeske Buie	San Francisco, Calif.	722.11	-2.89%	\$2.77	-1.41%	-1.51%
379	Willis Johnson & Associates	Houston, Texas	721.94	19.26%	\$2.17	20.34%	-0.89%
380	Stage Harbor Financial	Needham, Mass.	718.20	13.74%	\$3.01	3.27%	10.14%
381	Deerfield	Indianapolis, Ind.	715.77	2.64%	\$2.50	10.90%	-7.44%
382	Southern Financial Group	Birmingham, Ala.	705.41	11.67%	\$0.56	1.43%	10.09%
383	Investec Wealth Strategies	Houston, Texas	700.57	17.19%	\$2.36	13.64%	3.13%
384	Virtue Capital Management	Brentwood, Tenn.	700.32	32.32%	\$0.11	14.67%	15.39%
385	WorthPointe	San Diego, Calif.	690.91	10.75%	\$1.36	1.17%	9.46%
386	Halpern Financial	Ashburn, Va.	686.84	23.84%	\$2.54	13.29%	9.31%
387	Regatta Capital Group	El Segundo, Calif.	682.41	40.09%	\$0.85	18.20%	18.52%
388	Nelson Capital Management	Menlo Park, Calif.	680.00	-13.04%	\$5.23	0.33%	-13.33%
389	Ruggie Wealth Management	Tavares, Fla.	679.00	9.93%	\$0.85	4.42%	5.28%
390	Briaud Financial Advisors	College Station, Texas	672.51	13.26%	\$2.51	9.88%	3.08%
391	The Wealth Collaborative	Westlake Village, Calif.	671.35	20.84%	\$3.63	17.57%	2.78%
392	William Mack & Associates	Troy, Mich.	664.80	15.94%	\$0.90	12.34%	3.20%
393	Financial Partners Capital Management	New York, N.Y.	654.02	16.16%	\$2.32	11.22%	4.44%
394	PJ Schmidt Investment Management	Cedarburg, Wis.	652.45	8.90%	\$1.61	56.49%	-30.41%
395	StrategicPoint Investment Advisors	Providence, R.I.	648.31	5.97%	\$1.01	5.80%	0.16%
396	CapSouth Wealth Management	Dothan, Ala.	643.62	13.15%	\$1.64	2.78%	10.08%
397	Total Wealth Planning	Cincinnati, Ohio	641.13	14.72%	\$1.61	7.52%	6.70%
398	Cypress Point Wealth Management	Dallas, Texas	629.66	-8.64%	\$4.43	11.30%	-17.92%
399	Canal Capital Management	Richmond, Va.	628.75	32.04%	\$1.59	19.34%	10.64%
400	Sensible Financial Planning and Management	Waltham, Mass.	616.46	15.06%	\$2.22	10.92%	3.73%
401	Omega Wealth Partners	Fort Worth, Texas	616.00	16.89%	\$2.05	7.15%	9.09%
402	Omnia Family Wealth	Aventura, Fla.	610.52	4.60%	\$8.98	4.60%	0.00%
403	Berkshire Money Management	Dalton, Mass.	609.00	29.32%	\$0.98	21.38%	6.54%
404	Klaas Financial	Loves Park, Ill.	605.00	32.39%	\$0.58	45.51%	-9.02%
405	Optas Capital	San Francisco, Calif.	598.56	14.51%	\$5.25	-8.59%	25.27%
406	Asset Management Group	Stamford, Conn.	595.96	19.54%	\$2.27	18.63%	0.77%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@susanna-marra.com) at 732-450-8866 ext 24 or susanna@susanna-marra.com.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
407	Droms Strauss Wealth Management	St. Louis, Mo.	591.24	12.89%	\$1.70	7.36%	5.15%
408	Claro Advisors	Boston, Mass.	588.34	32.63%	\$0.94	10.81%	19.69%
409	Socius Family Office	Fort Lauderdale, Fla.	584.17	7.54%	\$3.95	6.09%	1.37%
410	J.P. King Advisors	Walnut Creek, Calif.	575.90	12.61%	\$1.59	11.37%	1.12%
411	The Arkansas Financial Group	Little Rock, Ark.	573.51	8.95%	\$1.84	8.25%	0.65%
412	Summit Wealth Partners	Orlando, Fla.	571.04	18.72%	\$0.78	-22.57%	53.33%
413	KMH Wealth Management	Victoria, Texas	569.26	11.93%	\$1.19	7.24%	4.37%
414	Insight Wealth Partners	Plano, Texas	569.03	30.63%	\$0.84	19.99%	8.87%
415	Frisch Financial Group	Melville, N.Y.	564.93	17.47%	\$1.20	14.97%	2.17%
416	BlueSky Wealth Advisors	New Bern, N.C.	560.78	23.47%	\$1.75	13.83%	8.47%
417	W.A. Smith Financial Group	Sheffield Village, Ohio	541.77	32.07%	\$0.34	-7.46%	42.72%
418	Investmark Advisory Group	Shelton, Conn.	541.68	17.95%	\$0.98	16.67%	1.09%
419	The L. Warner Companies	Timonium, Md.	538.75	9.04%	\$1.99	11.45%	-2.17%
420	Peavine Capital	Reno, Nev.	538.00	53.71%	\$23.39	153.96%	-39.47%
421	Mirador Capital Partners	Pleasanton, Calif.	536.00	46.45%	\$1.07	34.73%	8.70%
422	Bernhardt Wealth Management	McLean, Va.	534.28	8.98%	\$1.92	18.00%	-7.64%
423	Greystone Financial Group	Bloomfield Hills, Mich.	528.27	-11.82%	\$0.85	-7.73%	-4.44%
424	Financial Management Strategies	Broadview Heights, Ohio	525.16	17.34%	\$0.36	7.72%	8.93%
425	Excalibur Management Corp.	Newton, Mass.	519.00	6.96%	\$1.84	7.72%	-0.70%
426	Porter White Investment Advisors	Birmingham, Ala.	517.21	6.79%	\$4.83	6.79%	0.00%
427	Tobias Financial Advisors	Plantation, Fla.	513.00	19.58%	\$2.00	6.09%	12.72%
428	Frazier Financial Advisors	Dublin, Ohio	510.00	41.67%	\$1.52	31.09%	8.06%
429	Birchwood Financial Partners	Edina, Minn.	506.94	13.59%	\$1.32	14.18%	-0.52%
430	FMA Adisory	Harrisburg, Pa.	505.00	13.48%	\$0.84	8.75%	4.35%
431	Abound Wealth Management	Franklin, Tenn.	501.39	50.09%	\$1.44	15.48%	29.96%
432	McIlrath & Eck	Arlington, Wash.	501.04	26.14%	\$0.50	20.49%	4.69%
433	Elser Financial Planning	Indianapolis, Ind.	500.34	15.90%	\$2.00	4.31%	11.11%
ASSET CATEGORY: \$250 MILLION TO <\$500 MILLION							
434	Net Worth Advisory Group	Sandy, Utah	498.88	21.56%	\$1.06	11.99%	8.55%
435	Optima Asset Management	Dallas, Texas	490.13	2.34%	\$5.00	0.25%	2.08%
436	The Gleason Group	Prospect, Ky.	489.28	36.01%	\$2.08	32.54%	2.62%
437	Goodman Financial Corporation	Houston, Texas	488.18	8.91%	\$2.21	13.84%	-4.33%
438	Grand Wealth Management	Grand Rapids, Mich.	487.51	20.61%	\$3.11	9.09%	10.56%
439	Buckley Wealth Management	Las Vegas, Nev.	484.64	4.60%	\$2.09	-4.41%	9.43%
440	Sovereign Financial Group	Stamford, Conn.	482.67	117.50%	\$0.60	-24.06%	186.43%
441	Marotta Wealth Management	Charlottesville, Va.	470.74	6.35%	\$1.31	-11.17%	19.73%
442	PARAGON Wealth Strategies	Jacksonville, Fla.	467.69	89.79%	\$1.30	44.57%	31.27%
443	Three Bridge Wealth Advisors	Portola Valley, Calif.	467.45	4.99%	\$5.03	3.86%	1.09%
444	Spectrum Investment Advisors	Mequon, Wis.	461.22	26.87%	\$1.47	18.38%	7.17%
445	Next Generation Wealth Management	Milwaukee, Wis.	459.32	32.49%	\$1.55	36.52%	-2.95%
446	J.W. Coons Advisors	Columbus, Ohio	455.96	7.06%	\$3.02	9.18%	-1.95%
447	Jentner Wealth Management	Akron, Ohio	452.40	12.76%	\$1.55	11.60%	1.04%
448	Hopwood Financial Services	Reston, Va.	451.86	17.64%	\$1.84	11.42%	5.58%
449	Hochman Cole Financial Services	Deerfield, Ill.	442.54	13.83%	\$2.01	6.59%	6.80%
450	Wealth Care	Merritt Island, Fla.	440.11	21.24%	\$2.70	13.80%	6.54%
451	Oarsman Capital	Milwaukee, Wis.	435.57	-16.32%	\$0.92	31.25%	-36.24%
452	von Borstel & Associates†	The Dalles, Ore.	432.64	-2.86%	\$1.01	1.89%	-4.67%
453	Meritas Wealth Management	Larkspur, Calif.	425.11	16.07%	\$1.85	1.44%	14.43%
454	Gradient Capital Advisors	San Diego, Calif.	420.91	14.94%	\$0.99	11.96%	2.66%
455	Duncan Williams Asset Management	Memphis, Tenn.	409.72	200.47%	\$1.04	119.64%	36.81%
456	Jackson, Grant Investment Advisers	Stamford, Conn.	406.56	11.86%	\$4.15	14.15%	-2.00%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@fa-mag.com) at 732-450-8866 ext 24 or susanna@fa-mag.com.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
457	Fiduciary Wealth Management	Reston, Va.	402.58	38.99%	\$0.92	18.32%	17.47%
458	Stordahl Capital Management	Greenwood Village, Colo.	394.81	11.08%	\$1.61	6.55%	4.26%
459	Century Wealth Management	Memphis, Tenn.	392.44	9.55%	\$4.56	4.45%	4.88%
460	WJ Interests	Sugar Land, Texas	390.00	11.75%	\$1.80	6.60%	4.83%
461	Pinnacle Financial Group	Western Springs, Ill.	385.78	11.83%	\$1.21	8.68%	2.89%
462	Shorepoint Capital Partners	Norwood, Mass.	382.66	5.76%	\$1.60	5.32%	0.42%
463	The Goff Financial Group	Houston, Texas	382.21	8.04%	\$2.22	8.04%	0.00%
464	Court Place Advisors	Ellicott City, Md.	381.76	6.52%	\$1.15	5.88%	0.61%
465	Balboa Wealth Partners	Newport Beach, Calif.	381.00	86.86%	\$0.97	19.47%	56.40%
466	Asset Planning	Cypress, Calif.	377.16	15.93%	\$1.20	10.76%	4.67%
467	Resolute Financial	Newburyport, Mass.	374.75	9.19%	\$1.17	16.02%	-5.88%
468	Rainey & Randall Investment Management	Celebration, Fla.	371.38	15.07%	\$2.40	3.93%	10.71%
469	Clune & Associates	Chicago, Ill.	369.40	9.29%	\$2.05	3.22%	5.88%
470	Heritage Way Advisors	Rockford, Ill.	368.49	23.56%	\$2.18	13.32%	9.03%
471	Perspective Wealth Partners	Boise, Idaho	367.37	19.72%	\$2.11	14.21%	4.82%
472	QP Consulting	Takoma Park, Md.	363.81	20.26%	\$5.96	0.55%	19.61%
473	Apex Financial Advisors	Yardley, Pa.	363.81	16.73%	\$2.43	8.17%	7.91%
474	Mark Sheptoff Financial Planning	Glastonbury, Conn.	363.00	0.55%	\$1.05	0.55%	0.00%
475	Day & Ennis	Macon, Ga.	361.09	15.36%	\$1.71	9.34%	5.50%
476	Altrius Capital Management	New Bern, N.C.	361.00	6.18%	\$0.86	1.12%	5.00%
477	Cassady Schiller Wealth Management	Cincinnati, Ohio	360.81	16.33%	\$1.41	9.95%	5.81%
478	Wilsey Asset Management	San Diego, Calif.	360.27	20.40%	\$0.56	-0.04%	20.45%
479	Morling Financial Advisors	Fremont, Calif.	359.54	31.79%	\$2.19	101.70%	-34.66%
480	Arbor Wealth Management	Miramar Beach, Fla.	359.09	14.19%	\$1.05	10.53%	3.31%
481	Winch Financial	Appleton, Wis.	358.92	7.22%	\$0.45	6.82%	0.38%
482	Reston Wealth Management	Reston, Va.	358.87	10.92%	\$0.79	10.43%	0.44%
483	Burkett Financial Services	Rock Hill, S.C.	350.12	14.03%	\$0.96	10.89%	2.82%
484	Wechter Feldman Wealth Management	Parsippany, N.J.	349.77	7.50%	\$2.21	4.77%	2.60%
485	Transitions Wealth Management	Denver, Colo.	348.31	14.79%	\$0.96	12.56%	1.98%
486	Asset Advisory Group	Kinnelon, N.J.	346.94	13.29%	\$2.21	8.24%	4.67%
487	ARQ Wealth Advisors	Scottsdale, Ariz.	342.00	26.09%	\$1.36	9.58%	15.07%
488	Alpha Financial Advisors	Charlotte, N.C.	341.59	18.92%	\$1.52	11.49%	6.67%
489	Allodium Investment Consultants	Minneapolis, Minn.	340.14	8.70%	\$1.55	7.71%	0.92%
490	Fi3 Financial Advisors	Carmel, Ind.	336.85	18.78%	\$3.44	0.60%	18.07%
491	McCarthy Asset Management	Redwood Shores, Calif.	330.34	13.15%	\$1.47	13.15%	0.00%
492	Kercheville Advisors	San Antonio, Texas	328.09	11.47%	\$1.05	11.83%	-0.32%
493	MFA Wealth	Pittsburgh, Pa.	325.00	18.87%	\$0.48	-8.57%	30.02%
494	Cascade Investment Group	Colorado Springs, Colo.	317.57	4.97%	\$0.37	-20.27%	31.65%
495	Poehling Capital Management	Madison, Wis.	316.13	14.71%	\$0.99	24.39%	-7.78%
496	Searcy Financial Services	Overland Park, Kan.	309.65	13.99%	\$1.79	13.99%	0.00%
497	Manske Wealth Management	Houston, Texas	308.04	24.25%	\$0.96	14.99%	8.05%
498	Socha Financial Group	Corning, N.Y.	304.62	10.37%	\$0.43	8.95%	1.30%
499	Horizon Wealth Advisors	Houston, Texas	301.86	13.84%	\$1.84	11.75%	1.86%
500	R.W. Rogé & Company	Bohemia, N.Y.	299.16	9.54%	\$1.04	12.21%	-2.38%
501	Wakefield Asset Management	Englewood, Colo.	293.46	5.15%	\$1.40	20.17%	-12.50%
502	Asio Capital	Lexington, Ky.	290.31	44.22%	\$1.70	29.04%	11.76%
503	NS Capital	Stamford, Conn.	290.00	31.82%	\$2.23	21.68%	8.33%
504	Fortune Wealth Management	Dallas, Texas	289.91	13.06%	\$1.28	9.06%	3.67%
505	Falcon Wealth Planning	Ontario, Calif.	289.10	42.74%	\$0.50	17.91%	21.05%
506	Baron Financial Group	Fair Lawn, N.J.	288.68	18.76%	\$0.97	14.76%	3.48%
507	Trinity Financial Advisors	Columbus, Ohio	286.17	8.55%	\$1.95	-12.87%	24.58%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@susanna-marra.com) at 732-450-8866 ext 24 or susanna@susanna-marra.com.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
508	Legacy Consulting Group	Plano, Texas	283.38	14.01%	\$2.11	8.91%	4.69%
509	Treybourne Wealth Planners	Greenwood, Ind.	281.91	12.76%	\$0.89	9.93%	2.58%
510	Harbor Wealth Management	Boulder, Colo.	275.76	21.25%	\$1.70	14.51%	5.88%
511	Berno Financial Management	Cincinnati, Ohio	274.33	15.12%	\$2.09	9.85%	4.80%
512	KCS Wealth Advisory	Los Angeles, Calif.	272.21	13.08%	\$0.95	9.16%	3.60%
513	Samalin Investment Counsel	Chappaqua, N.Y.	272.07	29.19%	\$0.66	-6.33%	37.92%
514	DeGreen Capital Management	Glendale, Ariz.	271.86	26.15%	\$1.03	21.39%	3.92%
515	Etesian Wealth Advisors	West Linn, Ore.	267.21	24.17%	\$1.74	53.19%	-18.95%
516	WealthCrest Financial Services	Springfield, Va.	261.24	57.17%	\$1.16	74.63%	-10.00%
517	Sard Wealth Management Group	Atlanta, Ga.	258.56	15.37%	\$0.96	11.51%	3.46%
518	Fidato Wealth	Middleburg Heights, Ohio	258.36	21.65%	\$0.99	16.08%	4.80%
519	Sebold Capital Management	Naperville, Ill.	256.40	24.52%	\$1.77	23.66%	0.69%
520	TL Private Wealth	Southlake, Texas	256.00	34.74%	\$1.16	16.36%	15.79%
521	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	254.68	23.85%	\$1.77	15.25%	7.46%
522	Wealthview Capital	Jackson, Miss.	253.74	21.65%	\$1.41	19.62%	1.69%
523	Sandbox Financial Partners	Bethesda, Md.	252.82	35.88%	\$0.82	-7.52%	46.92%
524	Asset Planning Corporation	Knoxville, Tenn.	252.26	10.89%	\$1.22	7.12%	3.52%
ASSET CATEGORY: \$150 MILLION TO <\$250 MILLION							
525	Wasserman Wealth Management	Farmington, Mich.	246.75	8.66%	\$1.45	2.26%	6.25%
526	Financial Alternatives	La Jolla, Calif.	245.17	6.27%	\$1.80	3.15%	3.03%
527	Burrus Financial Services	Salt Lake City, Utah	243.57	13.98%	\$0.57	12.39%	1.42%
528	Beverly Investment Advisors	Beverly Hills, Calif.	238.61	18.29%	\$3.98	-11.28%	33.33%
529	Slayton Lewis	Salt Lake City, Utah	238.00	14.98%	\$3.72	11.38%	3.23%
530	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	237.00	8.22%	\$0.60	-15.52%	28.10%
531	Advisors Financial	Vienna, Va.	233.54	9.66%	\$1.22	3.38%	6.08%
532	Life Planning Partners	Jacksonville, Fla.	232.75	7.31%	\$2.42	7.31%	0.00%
533	Capital Investment Advisors	Washington, D.C.	232.38	13.02%	\$0.48	34.00%	-15.65%
534	Precipio Wealth Management	Bethesda, Va.	232.20	5.76%	\$2.32	5.76%	0.00%
535	Family Wealth Advisory Group	Cincinnati, Ohio	231.48	15.70%	\$1.34	3.67%	11.61%
536	Tull Financial Group	Chesapeake, Va.	229.68	11.33%	\$0.96	10.87%	0.42%
537	Vaughan & Co. Securities	Ridgewood, N.J.	228.00	137.50%	\$2.07	126.70%	4.76%
538	Smedley Financial Services	Salt Lake City, Utah	222.95	-3.64%	\$0.27	-1.39%	-2.28%
539	Empyryon Wealth Management	Roseville, Calif.	222.11	8.87%	\$2.68	4.94%	3.75%
540	Hixon Zuercher Capital Management	Findlay, Ohio	221.83	26.35%	\$0.79	16.94%	8.05%
541	Portfolio Wealth Advisors	Albuquerque, N.M.	216.30	36.96%	\$1.17	31.78%	3.93%
542	Foresight Capital Management Advisors	Saline, Mich.	210.35	10.83%	\$0.52	0.75%	10.00%
543	Spectrum Financial Alliance	Nicholasville, Ky.	209.49	3.02%	\$0.43	-16.86%	23.91%
544	Miller Advisors	Kirkland, Wash.	205.28	0.40%	\$0.96	22.45%	-18.01%
545	SimpliFi	San Diego, Calif.	200.55	14.85%	\$0.69	10.51%	3.93%
546	Centerline Wealth Advisors	Louisville, Ky.	200.42	9.03%	\$0.79	5.58%	3.27%
547	Veripax Wealth Management	Folsom, Calif.	195.72	11.78%	\$0.82	5.70%	5.75%
548	Integrated Capital Management	Bloomfield Hills, Mich.	190.38	32.75%	\$0.56	26.93%	4.59%
549	Charleston Financial Advisors	Charleston, S.C.	188.06	7.75%	\$0.95	-0.45%	8.24%
550	Merkle Retirement Planning	Grimes, Iowa	186.31	90.13%	\$0.38	64.24%	15.76%
551	Longview Financial Advisors	Huntsville, Ala.	184.84	4.95%	\$0.99	5.52%	-0.53%
552	Professional Financial Strategies	Pittsford, N.Y.	180.62	11.42%	\$1.90	11.42%	0.00%
553	Summit Place Financial Advisors	Summit, N.J.	179.72	16.36%	\$6.66	7.74%	8.00%
554	Kemp Financial Management	Fullerton, Calif.	178.61	9.50%	\$1.17	4.49%	4.79%
555	Fiduciary Financial Advisors	Grand Rapids, Mich.	174.10	101.50%	\$0.60	30.39%	54.55%
556	TABR Capital Management	Orange, Calif.	165.74	7.87%	\$0.71	4.18%	3.54%
557	Post Oak Private Wealth Advisors	Houston, Texas	163.90	20.52%	\$0.99	-5.05%	26.92%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@susanna-marra.com) at 732-450-8866 ext 24 or susanna@susanna-marra.com.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)*	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
558	Private Capital Management	Larkspur, Calif.	161.33	15.46%	\$3.51	7.93%	6.98%
559	Wealth Legacy Institute	Denver, Colo.	160.84	10.27%	\$1.45	5.30%	4.72%
560	Purtill Financial	Highland Heights, Ohio	158.07	61.84%	\$0.92	59.96%	1.18%
561	BCK Partner	Corning, N.Y.	154.96	21.05%	\$0.81	14.74%	5.49%
562	Colman Knight Advisory Group	Acton, Mass.	154.06	15.69%	\$2.23	5.63%	9.52%
563	Beacon Financial Advisors	Rye Brook, N.Y.	152.00	13.01%	\$3.10	6.09%	6.52%
564	Center for Asset Management	Palm Beach Gardens, Fla.	151.72	15.05%	\$0.80	9.60%	4.97%
565	Canter Wealth	La Jolla, Calif.	151.65	27.95%	\$0.87	-1.46%	29.85%
ASSET CATEGORY: \$50 MILLION TO <\$150 MILLION							
566	Atwater Wealth Management	Boston, Mass.	147.90	23.22%	\$1.76	18.82%	3.70%
567	Gold Medal Waters	Boulder, Colo.	143.58	17.56%	\$1.05	15.85%	1.48%
568	HCO Private Wealth	Roanoke, Va.	142.86	18.04%	\$1.15	11.38%	5.98%
569	SkyOak Capital	Las Vegas, Nev.	142.18	N/A	\$0.67	N/A	12.77%
570	Smith Bruer Advisors	Tallahassee, Fla.	138.96	16.27%	\$0.59	13.79%	2.17%
571	Lighthouse Wealth Management	Ashland, Ohio	138.30	25.40%	\$0.43	24.62%	0.63%
572	FSA Advisors	Warren, Mich.	137.18	77.22%	\$0.13	29.97%	36.35%
573	T2 Asset Management	Oakbrook Terrace, Ill.	137.00	0.74%	\$0.26	-5.10%	6.15%
574	Kotys Wealth Professionals	Valparaiso, Ind.	136.21	34.13%	\$0.53	22.69%	9.32%
575	Macke Financial Advisory Group	Fort Myers, FL, Fla.	135.36	5.47%	\$1.38	3.32%	2.08%
576	Paragon Wealth Management	Provo, Utah	127.29	15.85%	\$0.90	10.92%	4.44%
577	Ivy League Financial Advisors	Rockville, Md.	125.06	10.64%	\$1.32	17.63%	-5.94%
578	ChartMark Investments	Tulsa, Okla.	120.00	60.00%	\$1.20	52.00%	5.26%
579	Focus Financial Advisors	Rockford, Ill.	115.47	5.28%	\$0.82	5.28%	0.00%
580	Elderado Financial	Montrose, Colo.	114.90	22.78%	\$0.38	13.02%	8.63%
581	Equita Financial Network	Fort Washington, Pa.	107.61	153.72%	\$0.53	-12.94%	191.43%
582	Kimble Advisory	Richmond, Va.	103.88	16.67%	\$1.60	7.70%	8.33%
583	Murphy Capital Advisors	Goodyear, Ariz.	98.98	8.37%	\$1.32	8.37%	0.00%
584	Define Financial	San Diego, Calif.	94.08	27.83%	\$1.45	10.13%	16.07%
585	Steward Advisors	Chicago, Ill.	92.89	13.15%	\$1.39	1.33%	11.67%
586	Sommers Financial Management	St helens, Ore.	90.00	45.16%	\$0.22	35.58%	7.07%
587	Brighton Financial Planning	Flemington, N.J.	84.35	18.85%	\$0.84	18.85%	0.00%
588	Chilmark Financial Advisors	Miami, Fla.	78.05	10.60%	\$1.35	8.69%	1.75%
589	Westfield Wealth Management	Westfield, N.J.	76.29	18.66%	\$1.09	23.74%	-4.11%
590	First and Main Financial	Piedmont, Calif.	72.00	34.33%	\$0.85	2.72%	30.77%
591	Horizons Planning Corporation	Ann Arbor, Mich.	69.00	18.97%	\$0.30	-2.57%	22.11%
592	Graf Financial	Baton Rouge, La.	61.25	4.32%	\$1.30	13.20%	-7.84%
593	MTR Financial Services	Kingwood, Texas	59.21	47.65%	\$0.70	16.39%	26.87%
594	Bills Asset Management	Nashville, Tenn.	55.66	13.58%	\$0.28	-0.62%	14.29%
595	Oak Street Advisors	Myrtle Beach, S.C.	52.31	7.19%	\$0.49	14.20%	-6.14%
596	Safe Harbor Asset Management	Huntington, N.Y.	49.66	6.55%	\$1.01	6.55%	0.00%
597	Prince Financial Advisory	New York, N.Y.	42.88	22.16%	\$0.73	26.30%	-3.28%
598	Shriver Investments	Parker, Colo.	40.48	14.84%	\$0.57	13.22%	1.43%
599	MFAC Financial Advisors	Westlake Village, Calif.	38.93	8.98%	\$3.24	8.98%	0.00%
600	Generations Investment Advisors	High Point, N.C.	26.00	0.00%	\$0.26	-11.88%	13.48%
601	Aerie Capital Management	Baltimore, Md.	16.30	29.35%	\$0.29	27.08%	1.79%
602	Venn Wealth & Benefit Services	Altoona, Pa.	14.52	-0.20%	\$0.16	-2.45%	2.30%
603	Aurora Strategic Advisors	Lumberton, N.C.	13.50	107.69%	\$0.05	56.75%	32.50%
604	Birch Investment Management	Brookings, S.D.	13.42	25.30%	\$0.23	12.34%	11.54%
605	Lindy S. Diamond, Personal Financial Services	San Marcos, Calif.	8.59	18.97%	\$0.86	7.07%	11.11%
606	Atherean Wealth Management	Jersey City, N.J.	6.12	23.38%	\$0.29	17.50%	5.00%
607	Carthage Financial Group	Braintree, Mass.	5.20	13.04%	\$0.10	1.74%	11.11%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. †Transitioned to an independent RIA in 2020.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.
For reprints of the PDF please contact [Susanna Marra](mailto:susanna@susanna-marra.com) at 732-450-8866 ext 24 or susanna@susanna-marra.com.