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2024

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TOP 50 FASTEST-GROWING FIRMS

Firms with more than \$500 million in AUM.

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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

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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 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. # Destiny Wealth Partners' 2023 and 2022 AUM and Assets Per Client have been revised because of participant error.

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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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FA's 2024 RIA RANKING

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	Destiny Wealth Partners #	Tavares, Fla.	1,101.00	18.01%	1.18	20.54%	-2.10%
266	Halpern Financial	Ashburn, Va.	1,098.49	32.53%	3.43	26.32%	4.92%
267	Agili, P.C.	Richmond, Va.	1,096.21	12.72%	3.12	12.07%	0.57%
268	Lynx Investment Advisory	Washington, D.C.	1,081.79	1.33%	4.92	-2.36%	3.77%
269	Palisade Asset Management	Minneapolis, Minn.	1,069.27	5.64%	3.75	-2.52%	8.37%
270	Abound Wealth Management	Franklin, Tenn.	1,065.31	33.15%	1.61	14.27%	16.52%
271	Rollins Financial Advisors	Atlanta, Ga.	1,063.38	25.35%	1.09	26.51%	-0.92%
272	Evermay Wealth Management ‡	Arlington, Va.	1,062.57	32.90%	2.08	8.50%	22.49%
273	MJP Wealth Advisors	Farmington, Conn.	1,056.63	22.24%	1.30	16.24%	5.16%
274	Total Wealth Planning	Blue Ash, Ohio	1,055.36	21.87%	1.48	9.93%	10.85%
275	Pinkerton Retirement Specialists	Coeur d'Alene, Idaho	1,033.38	9.28%	1.28	6.42%	2.68%
276	Delegate Advisors	Chapel Hill, N.C.	1,032.24	14.38%	27.16	29.43%	-11.63%
277	Moisand Fitzgerald Tamayo	Orlando, Fla.	1,028.56	14.10%	1.21	4.34%	9.36%
278	REDW Wealth	Albuquerque, N.M.	1,004.65	12.08%	2.29	10.54%	1.39%
279	Lake Street Private Wealth	Chicago, Ill.	1,000.80	25.67%	1.77	20.77%	4.06%

ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION

280	Fermata Advisors	Sonoma, Calif.	973.85	32.71%	0.56	34.55%	-1.37%
281	Signet Financial Management	Parsippany, N.J.	949.40	13.07%	1.31	13.07%	0.00%
282	DiNuzzo Private Wealth	Beaver, Pa.	946.48	12.39%	1.17	13.64%	-1.10%
283	Verity Investment Partners	Beaufort, S.C.	938.78	11.75%	2.21	-1.14%	13.03%
284	Seasons of Advice Wealth Management	New York, N.Y.	931.81	18.06%	1.17	14.50%	3.10%
285	Rappaport Reiches Capital Management	Skokie, Ill.	928.00	21.47%	2.31	16.03%	4.69%
286	Financial Advisory Corporation	Grand Rapids, Mich.	913.27	14.77%	4.19	13.72%	0.93%
287	Buffington Mohr McNeal	Boise, Idaho	911.76	16.51%	1.47	10.68%	5.27%
288	SC&H Wealth	Sparks, Md.	908.92	23.25%	1.52	16.66%	5.64%
289	Hemington Wealth Management	Falls Church, Va.	894.45	4.16%	1.33	4.62%	-0.44%
290	Stage Harbor Financial	Needham, Mass.	876.60	13.08%	2.80	10.19%	2.62%
291	Yeske Buie	San Francisco, Calif.	873.02	13.72%	3.28	13.72%	0.00%
292	Southern Financial Group	Birmingham, Ala.	854.84	15.34%	0.77	28.64%	-10.34%
293	Chemistry Wealth Management	New York, N.Y.	846.84	22.16%	1.70	20.93%	1.01%
294	Mcllrath & Eck	Arlington, Wash.	839.59	29.29%	0.80	25.00%	3.43%
295	Opal Wealth Advisors	Jericho, N.Y.	825.86	30.45%	1.33	15.11%	13.32%
296	Falcon Wealth Planning	Ontario, Calif.	825.83	80.92%	0.58	-13.67%	109.57%
297	Glass Jacobson Investment Advisors	Owings Mills, Md.	817.31	6.13%	1.23	-0.59%	6.76%
298	Next Level Private	Harrison, N.Y.	810.71	26.00%	1.59	46.26%	-13.85%

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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	J.W. Burns & Company	Dewitt, N.Y.	801.88	14.36%	1.37	5.37%	8.53%
300	Richard P. Slaughter Associates	Austin, Texas	796.77	9.20%	1.77	1.92%	7.14%
301	Catalyst Financial Partners ††	Boston, Mass.	795.25	45.31%	3.72	-5.62%	53.96%
302	Fi3 Financial Advisors	Indianapolis, Ind.	791.67	20.46%	3.68	2.53%	17.49%
303	Insight Wealth Partners	Plano, Texas	789.96	14.80%	0.92	10.13%	4.24%
304	Financial Insights Wealth Management	Tacoma, Wash.	789.09	27.06%	1.04	27.39%	-0.26%
305	Christopher Weil & Company	San Diego, Calif.	781.98	-29.37%	1.48	-34.44%	7.72%
306	Blankinship & Foster	Solana Beach, Calif.	780.37	13.09%	2.57	13.09%	0.00%
307	Great Lakes Retirement	Sheffield Village, Ohio	776.91	24.32%	0.44	23.61%	0.57%
308	CapSouth Wealth Management	Dothan, Ala.	762.93	15.42%	1.82	21.47%	-4.98%
309	Omnia Family Wealth	Aventura, Fla.	759.72	5.21%	9.26	-2.49%	7.89%
310	William Mack & Associates	Troy, Mich.	754.78	16.23%	0.89	15.41%	0.71%
311	Sikich Financial	Springfield, Ill.	749.06	54.01%	1.00	108.44%	-26.11%
312	Shorepoint Capital Partners	Norwood, Mass.	736.23	56.32%	1.52	24.09%	25.97%
313	BlueSky Wealth Advisors ‡	New Bern, N.C.	730.18	19.23%	2.09	19.91%	-0.57%
314	Schnieders Capital Management	Pasadena, Calif.	725.04	-33.00%	2.79	-38.16%	8.33%
315	Spectrum Investment Advisors	Mequon, Wis.	724.82	22.79%	0.99	15.61%	6.21%
316	Frisch Financial Group	Melville, N.Y.	720.85	21.85%	1.36	18.87%	2.51%
317	MG&A Wealth	Plantation, Fla.	718.51	-29.90%	2.05	-34.91%	7.69%
318	Investmark Advisory Group	Shelton, Conn.	712.46	14.33%	1.15	12.48%	1.64%
319	Porter White Investment Advisors	Birmingham, Ala.	707.32	10.40%	5.75	5.02%	5.13%
320	AMI Investment Management	Kendallville, Ind.	705.32	7.41%	2.30	N/A	N/A
321	Briaud Financial Advisors	College Station, Texas	705.04	6.13%	2.61	8.89%	-2.53%
322	Leisure Capital Management	Costa Mesa, Calif.	703.94	-1.96%	2.17	-8.01%	6.58%
323	Keller Wealth Advisors	Victoria, Texas	703.89	15.96%	1.37	13.25%	2.39%
324	Goodman Financial Corporation	Houston, Texas	698.59	20.43%	2.76	18.05%	2.02%
325	Asset Management Group	Stamford, Conn.	695.51	17.73%	2.60	15.97%	1.52%
326	Klaas Financial Asset Advisors	Loves Park, Ill.	682.00	16.18%	0.66	21.60%	-4.46%
327	Droms Strauss Wealth Management	Saint Louis, Mo.	676.16	14.09%	1.96	29.64%	-11.99%
328	Vance Wealth	Santa Clarita, Calif.	670.81	49.49%	1.93	31.01%	14.10%
329	The L. Warner Companies	Timonium, Md.	657.43	8.49%	2.19	11.38%	-2.60%
330	High Net Worth Advisory Group	Naples, Fla.	648.68	12.03%	1.57	1.97%	9.87%
331	OPTAS Capital	Austin, Texas	633.67	15.59%	4.56	17.25%	-1.42%
332	Net Worth Advisory Group	Sandy, Utah	632.12	20.53%	0.86	15.95%	3.95%
333	Carolina Wealth Management	Greenville, N.C.	623.82	20.92%	1.11	12.32%	7.66%
334	Arista Wealth Management	Las Vegas, Nev.	621.20	12.93%	1.45	-5.05%	18.94%
335	Morling Financial Advisors	Fremont, Calif.	606.99	24.99%	1.78	24.26%	0.59%
336	Excalibur Management	Waltham, Mass.	606.40	12.10%	1.96	11.37%	0.65%
337	Adams Wealth Advisors	Logan, Utah	603.49	35.99%	0.88	25.47%	8.39%
338	Birchwood Financial Partners	Edina, Minn.	600.44	15.76%	0.97	14.45%	1.14%
339	Optima Asset Management	Dallas, Texas	599.04	8.99%	4.83	9.87%	-0.80%
340	Marotta Wealth Management	Charlottesville, Va.	591.21	12.66%	1.60	10.53%	1.93%
341	Clune & Associates	Chicago, Ill.	582.69	34.35%	2.70	25.64%	6.93%
342	NorthCape Wealth Management	Willimsville, N.Y.	565.61	14.77%	0.94	20.32%	-4.61%
343	Gradient Capital Advisors	San Diego, Calif.	546.42	19.53%	1.28	25.13%	-4.47%
344	Ballast	Lexington, Ky.	543.90	28.46%	1.29	17.44%	9.38%
345	Financial Management Strategies	Broadview Heights, Ohio	542.02	3.77%	0.53	N/A	N/A
346	Buckley Wealth Management	Las Vegas, Nev.	541.54	11.60%	2.42	9.61%	1.82%
347	Monument Group Wealth Advisors	Concord, Mass.	535.58	26.73%	3.19	9.38%	15.86%
348	J.W. Coons Advisors	Columbus, Ohio	533.80	6.21%	3.56	9.05%	-2.60%

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Commonwealth



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349	Level Financial Advisors	East Amherst, N.Y.	529.56	-14.70%	0.86	-15.11%	0.49%
350	Meritas Wealth Management	Larkspur, Calif.	523.18	-6.67%	2.34	2.08%	-8.57%
351	Jentner Wealth Management	Akron, Ohio	522.58	8.63%	1.65	6.57%	1.94%
352	Manske Wealth Management	Houston, Texas	513.33	20.38%	1.17	11.56%	7.90%
353	Wilsey Asset Management	San Diego, Calif.	511.42	14.68%	0.54	7.82%	6.35%
354	Financial Alternatives	La Jolla, Calif.	507.03	10.47%	1.97	9.18%	1.18%
355	von Borstel & Associates	The Dalles, Ore.	504.44	12.17%	1.08	8.79%	3.10%
ASSET CATEGORY: \$250 MILLION TO < \$500 MILLION							
356	Pinnacle Financial Group	Western Springs, Ill.	499.75	18.56%	1.47	19.60%	-0.87%
357	Asio Capital	Lexington, Ky.	499.55	27.02%	2.01	15.75%	9.73%
358	Trinity Financial Advisors	Columbus, Ohio	487.33	22.09%	2.71	22.09%	0.00%
359	WJ Interests	Sugar Land, Texas	484.00	13.62%	2.16	8.54%	4.67%
360	Family Office Research	Bethesda, Md.	479.01	19.78%	5.32	37.08%	-12.62%
361	Transitions Wealth Management	Denver, Colo.	478.40	22.17%	1.08	8.32%	12.79%
362	Marshall Financial Group	Hunt Valley, Md.	468.81	23.27%	0.68	12.55%	9.52%
363	Sandbox Financial Partners	Bethesda, Md.	463.72	27.23%	1.43	7.66%	18.18%
364	Asset Planning	Cypress, Calif.	446.50	13.22%	1.14	11.77%	1.29%
365	Alpha Financial Advisors	Charlotte, N.C.	445.13	25.89%	1.78	20.35%	4.60%
366	ARQ Wealth Advisors	Scottsdale, Ariz.	443.57	12.17%	1.26	0.03%	12.14%
367	Fortitude Family Office	Scottsdale, Ariz.	434.33	121.20%	7.90	40.77%	57.14%
368	Monument Capital Management \$\$\$	Alexandria, Va.	433.82	8.51%	2.17	0.37%	8.11%
369	Dash Investments	Woodland Hills, Calif.	427.06	72.58%	1.17	41.37%	22.07%
370	Winch Financial	Appleton, Wis.	420.20	25.84%	0.52	33.52%	-5.76%
371	QP Consulting	Takoma Park, Md.	419.10	11.82%	5.99	2.24%	9.38%
372	ShoreHaven Wealth Partners	Red Bank, N.J.	418.10	15.68%	1.67	1.80%	13.64%
373	Allodium Investment Consultants	Minneapolis, Minn.	396.43	15.67%	1.64	14.23%	1.26%
374	Kercheville Advisors	San Antonio, Texas	394.56	13.48%	1.23	12.06%	1.27%
375	StrongBox Wealth	Lee's Summit, Mo.	394.04	18.02%	0.88	6.12%	11.22%
376	Jackson Square Capital	San Francisco, Calif.	393.69	24.42%	3.03	7.20%	16.07%
377	WealthCrest Financial Services	Springfield, Va.	386.90	25.91%	1.11	13.32%	11.11%
378	Searcy Financial Services	Overland Park, Kan.	377.86	12.98%	2.13	14.90%	-1.67%
379	McCarthy Asset Management	Redwood Shores, Calif.	366.20	12.28%	1.66	11.27%	0.91%
380	Samalin Wealth	Chappaqua, N.Y.	364.52	20.22%	0.73	17.32%	2.47%
381	R.W. Rogé & Company	Bohemia, N.Y.	336.00	16.67%	1.11	12.82%	3.41%
382	Sard Wealth Management Group	Atlanta, Ga.	334.90	15.54%	1.15	9.59%	5.43%
383	Elite Retirement Planning	Grimes, Iowa	334.80	49.63%	0.39	34.67%	11.11%
384	Baron Financial Group	Fair Lawn, N.J.	331.78	10.35%	1.07	13.57%	-2.83%
385	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	322.59	17.41%	0.88	19.96%	-2.13%
386	Legacy CG dba Legacy Consulting Group	Plano, Texas	316.58	17.59%	2.17	19.20%	-1.35%
387	Navigoe	Redondo Beach, Calif.	316.56	11.70%	2.34	15.83%	-3.57%
388	Fortune Wealth Management	Dallas, Texas	306.00	15.66%	1.42	12.97%	2.38%
389	Sebold Capital Management	Lisle, Ill.	303.81	17.43%	2.81	12.00%	4.85%
390	Hurley Financial Group	Corvallis, Ore.	301.56	30.33%	0.65	34.27%	-2.94%
391	Sharper & Granite	El Segundo, Calif.	299.86	33.61%	2.38	11.34%	20.00%
392	Veripax Wealth Management	Folsom, Calif.	289.70	25.70%	0.97	16.42%	7.97%
393	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	287.24	14.33%	1.76	15.03%	-0.61%
394	Canter Wealth	La Jolla, Calif.	286.61	39.76%	1.03	20.22%	16.25%
395	FSA Advisors	Troy, Mich.	284.60	33.90%	0.22	51.85%	-11.82%
396	Integrated Capital Management	Bloomfield Hills, Mich.	283.16	34.09%	0.69	26.53%	5.97%
397	Life Planning Partners	Jacksonville, Fla.	273.80	17.98%	3.01	23.17%	-4.21%

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398	Centerline Wealth Advisors	Louisville, Ky.	261.00	25.59%	0.92	21.19%	3.64%
399	Foresight Capital Management Advisors	Saline, Mich.	253.54	19.35%	0.50	16.77%	2.21%
ASSET CATEGORY: \$150 MILLION TO < \$250 MILLION							
400	Kemp Financial Management	Fullerton, Calif.	230.00	13.46%	1.44	6.36%	6.67%
401	Pearson Creek Capital Management	Chicago, Ill.	225.00	-18.77%	14.06	-23.85%	6.67%
402	Kotys Wealth Professionals	Valparaiso, Ind.	223.43	18.22%	0.83	17.78%	0.37%
403	Byrne Asset Management	Kingston, N.J.	210.87	16.31%	1.42	13.19%	2.76%
404	Charleston Financial Advisors	Charleston, S.C.	210.71	13.33%	1.00	11.19%	1.93%
405	TABR Capital Management	Orange, Calif.	203.44	11.60%	0.87	14.45%	-2.49%
406	RHS Financial	San Francisco, Calif.	198.11	19.82%	1.23	16.10%	3.21%
407	Gold Medal Waters ‡	Boulder, Colo.	193.62	24.96%	1.36	23.20%	1.43%
408	Center For Asset Management	Palm Beach Gardens, Fla.	193.34	10.83%	0.86	0.53%	10.24%
409	Atwater Wealth Management	Boston, Mass.	192.66	9.33%	1.95	-2.81%	12.50%
410	Professional Financial Strategies	Pittsford, N.Y.	191.54	7.05%	1.82	10.11%	-2.78%
411	Westview Investment Advisors	Burlington, Vt.	180.46	14.68%	1.19	10.15%	4.11%
412	Elderado Financial	Montrose, Colo.	172.27	21.28%	0.46	11.28%	8.99%
413	Aldebaran Financial Insights	Kingsport, Tenn.	172.00	-22.66%	0.69	-7.19%	-16.67%
414	Lighthouse Wealth Management	Ashland, Ohio	170.42	11.51%	0.48	14.01%	-2.20%
415	Purtill Financial	Highland Heights, Ohio	166.49	5.80%	0.97	7.03%	-1.15%
416	Smith Bruer Advisors	Tallahassee, Fla.	159.60	8.92%	0.62	4.26%	4.47%
417	Paragon Wealth Management	Provo, Utah	156.42	14.53%	0.97	10.99%	3.18%
ASSET CATEGORY: < \$150 MILLION							
418	Ivy League Financial Advisors	Rockville, Md.	133.84	16.33%	1.49	22.80%	-5.26%
419	Steward Advisors	Chicago, Ill.	132.45	15.22%	1.34	18.71%	-2.94%
420	Strada Wealth Management	Austin, Texas	105.00	40.00%	3.50	-30.00%	100.00%
421	Meritas Advisors	San Rafael, Calif.	100.61	39.30%	2.05	44.98%	-3.92%
422	MTR Financial Services	Kingwood, Texas	97.74	21.08%	0.93	-19.28%	50.00%
423	Chilmark Financial Advisors	Miami, Fla.	84.83	12.77%	1.54	14.83%	-1.79%
424	The Leonard Financial Group	Riverside, Calif.	39.13	13.48%	0.51	0.21%	13.24%
425	Safe Harbor Asset Management	Huntington, N.Y.	34.73	1.18%	1.09	-1.98%	3.23%
426	Venn Wealth & Benefit Services	Altoona, Pa.	22.21	29.20%	0.17	15.98%	11.40%
427	Birch Investment Management	Brookings, S.D.	19.78	8.54%	0.33	-9.55%	20.00%
428	Aurora Strategic Advisors	Lumberton, N.C.	15.00	-3.23%	0.03	-10.39%	8.00%
429	Old Oak Advisors	Vestavia Hills, Ala.	13.21	57.09%	0.35	15.75%	35.71%
430	Atherean Wealth Management	Jersey City, N.J.	7.49	7.85%	0.30	16.48%	-7.41%
431	Carthage Financial Group	Braintree, Mass.	5.00	11.11%	0.05	8.89%	2.04%

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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

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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	Klinglestein 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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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)*
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	Destiny Wealth Partners#	Tavares, Fla.	1,041.00	60.00	1,101.00
266	Halpern Financial	Ashburn, Va.	1,098.49	0.00	1,098.49
267	Agili, P.C.	Richmond, Va.	1,083.96	12.25	1,096.21
268	Lynx Investment Advisory	Washington, D.C.	214.30	867.48	1,081.79
269	Palisade Asset Management	Minneapolis, Minn.	972.38	96.89	1,069.27
270	Abound Wealth Management	Franklin, Tenn.	1,065.31	0.00	1,065.31
271	Rollins Financial Advisors	Atlanta, Ga.	1,063.38	0.00	1,063.38
272	Evermay Wealth Management ‡	Arlington, Va.	1,037.28	25.30	1,062.57
273	MJP Wealth Advisors	Farmington, Conn.	1,056.63	0.00	1,056.63
274	Total Wealth Planning	Blue Ash, Ohio	997.88	57.48	1,055.36
275	Pinkerton Retirement Specialists	Coeur d'Alene, Idaho	948.09	85.29	1,033.38
276	Delegate Advisors	Chapel Hill, N.C.	252.29	779.95	1,032.24
277	Moisand Fitzgerald Tamayo	Orlando, Fla.	1,028.56	0.00	1,028.56
278	REDW Wealth	Albuquerque, N.M.	1,004.65	0.00	1,004.65
279	Lake Street Private Wealth	Chicago, Ill.	946.46	54.35	1,000.80
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION					
280	Fermata Advisors	Sonoma, Calif.	802.26	171.59	973.85
281	Signet Financial Management	Parsippany, N.J.	949.40	0.00	949.40
282	DiNuzzo Private Wealth	Beaver, Pa.	946.48	0.00	946.48
283	Verity Investment Partners	Beaufort, S.C.	930.88	7.90	938.78
284	Seasons of Advice Wealth Management	New York, N.Y.	887.56	44.26	931.81
285	Rappaport Reiches Capital Management	Skokie, Ill.	928.00	0.00	928.00
286	Financial Advisory Corporation	Grand Rapids, Mich.	913.27	0.00	913.27
287	Buffington Mohr McNeal	Boise, Idaho	893.49	18.27	911.76
288	SC&H Wealth	Sparks, Md.	904.91	4.01	908.92
289	Hemington Wealth Management	Falls Church, Va.	879.34	15.10	894.45
290	Stage Harbor Financial	Needham, Mass.	876.60	0.00	876.60
291	Yeske Buie	San Francisco, Calif.	862.24	10.78	873.02
292	Southern Financial Group	Birmingham, Ala.	854.84	0.00	854.84

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293	Chemistry Wealth Management	New York, N.Y.	838.39	8.45	846.84
294	McIlrath & Eck	Arlington, Wash.	839.59	0.00	839.59
295	Opal Wealth Advisors	Jericho, N.Y.	560.37	265.50	825.86
296	Falcon Wealth Planning	Ontario, Calif.	769.55	56.28	825.83
297	Glass Jacobson Investment Advisors	Owings Mills, Md.	806.01	11.30	817.31
298	Next Level Private	Harrison, N.Y.	781.63	29.07	810.71
299	J.W. Burns & Company	Dewitt, N.Y.	773.93	27.96	801.88
300	Richard P. Slaughter Associates	Austin, Texas	780.78	15.99	796.77
301	Catalyst Financial Partners ††	Boston, Mass.	795.25	0.00	795.25
302	Fi3 Financial Advisors	Indianapolis, Ind.	682.46	109.21	791.67
303	Insight Wealth Partners	Plano, Texas	788.32	1.64	789.96
304	Financial Insights Wealth Management	Tacoma, Wash.	789.09	0.00	789.09
305	Christopher Weil & Company	San Diego, Calif.	736.17	45.80	781.98
306	Blankinship & Foster	Solana Beach, Calif.	780.37	0.00	780.37
307	Great Lakes Retirement	Sheffield Village, Ohio	709.42	67.49	776.91
308	CapSouth Wealth Management	Dothan, Ala.	322.84	440.09	762.93
309	Omnia Family Wealth	Aventura, Fla.	640.11	119.61	759.72
310	William Mack & Associates	Troy, Mich.	752.58	2.20	754.78
311	Sikich Financial	Springfield, Ill.	744.64	4.42	749.06
312	Shorepoint Capital Partners	Norwood, Mass.	674.49	61.74	736.23
313	BlueSky Wealth Advisors ‡	New Bern, N.C.	730.18	0.00	730.18
314	Schnieders Capital Management	Pasadena, Calif.	684.47	40.56	725.04
315	Spectrum Investment Advisors	Mequon, Wis.	719.39	5.43	724.82
316	Frisch Financial Group	Melville, N.Y.	683.63	37.22	720.85
317	MG&A Wealth	Plantation, Fla.	683.75	34.76	718.51
318	Investmark Advisory Group	Shelton, Conn.	712.46	0.00	712.46
319	Porter White Investment Advisors	Birmingham, Ala.	697.55	9.77	707.32
320	AMI Investment Management	Kendallville, Ind.	705.32	0.00	705.32
321	Briaud Financial Advisors	College Station, Texas	691.92	13.12	705.04
322	Leisure Capital Management	Costa Mesa, Calif.	703.94	0.00	703.94
323	Keller Wealth Advisors	Victoria, Texas	692.60	11.29	703.89
324	Goodman Financial Corporation	Houston, Texas	698.59	0.00	698.59
325	Asset Management Group	Stamford, Conn.	695.51	0.00	695.51
326	Klaas Financial Asset Advisors	Loves Park, Ill.	569.00	113.00	682.00
327	Droms Strauss Wealth Management	Saint Louis, Mo.	672.37	3.79	676.16
328	Vance Wealth	Santa Clarita, Calif.	592.51	78.30	670.81
329	The L. Warner Companies	Timonium, Md.	657.43	0.00	657.43
330	High Net Worth Advisory Group	Naples, Fla.	617.46	31.23	648.68
331	OPTAS Capital	Austin, Texas	633.67	0.00	633.67
332	Net Worth Advisory Group	Sandy, Utah	366.90	265.22	632.12
333	Carolina Wealth Management	Greenville, N.C.	2.72	621.10	623.82
334	Arista Wealth Management	Las Vegas, Nev.	479.65	141.55	621.20
335	Morning Financial Advisors	Fremont, Calif.	606.99	0.00	606.99
336	Excalibur Management	Waltham, Mass.	600.62	5.78	606.40
337	Adams Wealth Advisors	Logan, Utah	603.49	0.00	603.49
338	Birchwood Financial Partners	Edina, Minn.	580.39	20.04	600.44
339	Optima Asset Management	Dallas, Texas	0.00	599.04	599.04
340	Marotta Wealth Management	Charlottesville, Va.	563.88	27.33	591.21
341	Clune & Associates	Chicago, Ill.	502.68	80.02	582.69

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342	NorthCape Wealth Management	Willimsville, N.Y.	549.45	16.16	565.61
343	Gradient Capital Advisors	San Diego, Calif.	465.93	80.49	546.42
344	Ballast	Lexington, Ky.	511.47	32.43	543.90
345	Financial Management Strategies	Broadview Heights, Ohio	432.99	109.03	542.02
346	Buckley Wealth Management	Las Vegas, Nev.	541.54	0.00	541.54
347	Monument Group Wealth Advisors	Concord, Mass.	535.58	0.00	535.58
348	J.W. Coons Advisors	Columbus, Ohio	480.03	53.77	533.80
349	Level Financial Advisors	East Amherst, N.Y.	529.56	0.00	529.56
350	Meritas Wealth Management	Larkspur, Calif.	523.18	0.00	523.18
351	Jentner Wealth Management	Akron, Ohio	517.86	4.72	522.58
352	Manske Wealth Management	Houston, Texas	513.33	0.00	513.33
353	Wilsey Asset Management	San Diego, Calif.	509.58	1.84	511.42
354	Financial Alternatives	La Jolla, Calif.	503.81	3.22	507.03
355	von Borstel & Associates	The Dalles, Ore.	504.44	0.00	504.44
ASSET CATEGORY: \$250 MILLION TO < \$500 MILLION					
356	Pinnacle Financial Group	Western Springs, Ill.	476.37	23.38	499.75
357	Asio Capital	Lexington, Ky.	499.55	0.00	499.55
358	Trinity Financial Advisors	Columbus, Ohio	485.91	1.42	487.33
359	WJ Interests	Sugar Land, Texas	484.00	0.00	484.00
360	Family Office Research	Bethesda, Md.	214.20	264.82	479.01
361	Transitions Wealth Management	Denver, Colo.	478.40	0.00	478.40
362	Marshall Financial Group	Hunt Valley, Md.	459.74	9.07	468.81
363	Sandbox Financial Partners	Bethesda, Md.	420.18	43.54	463.72
364	Asset Planning	Cypress, Calif.	445.30	1.20	446.50
365	Alpha Financial Advisors	Charlotte, N.C.	443.74	1.38	445.13
366	ARQ Wealth Advisors	Scottsdale, Ariz.	441.57	2.00	443.57
367	Fortitude Family Office	Scottsdale, Ariz.	413.29	21.04	434.33
368	Monument Capital Management §§§	Alexandria, Va.	417.20	16.62	433.82
369	Dash Investments	Woodland Hills, Calif.	427.06	0.00	427.06
370	Winch Financial	Appleton, Wis.	420.20	0.00	420.20
371	QP Consulting	Takoma Park, Md.	66.40	352.69	419.10
372	ShoreHaven Wealth Partners	Red Bank, N.J.	400.87	17.23	418.10
373	Allodium Investment Consultants	Minneapolis, Minn.	396.43	0.00	396.43
374	Kercheville Advisors	San Antonio, Texas	356.14	38.42	394.56
375	StrongBox Wealth	Lee's Summit, Mo.	374.13	19.91	394.04
376	Jackson Square Capital	San Francisco, Calif.	252.21	141.48	393.69
377	WealthCrest Financial Services	Springfield, Va.	371.90	15.00	386.90
378	Searcy Financial Services	Overland Park, Kan.	372.76	5.10	377.86
379	McCarthy Asset Management	Redwood Shores, Calif.	366.20	0.00	366.20
380	Samalin Wealth	Chappaqua, N.Y.	326.97	37.55	364.52
381	R.W. Rogé & Company	Bohemia, N.Y.	321.00	15.00	336.00
382	Sard Wealth Management Group	Atlanta, Ga.	312.46	22.43	334.90
383	Elite Retirement Planning	Grimes, Iowa	334.80	0.00	334.80
384	Baron Financial Group	Fair Lawn, N.J.	327.66	4.12	331.78
385	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	318.90	3.69	322.59
386	Legacy CG (dba Legacy Consulting Group)	Plano, Texas	304.31	12.28	316.58
387	Navigoe	Redondo Beach, Calif.	314.62	1.94	316.56
388	Fortune Wealth Management	Dallas, Texas	303.20	2.80	306.00
389	Sebold Capital Management	Lisle, Ill.	233.07	70.73	303.81

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390	Hurley Financial Group	Corvallis, Ore.	301.56	0.00	301.56
391	Sharper & Granite	El Segundo, Calif.	299.86	0.00	299.86
392	Veripax Wealth Management	Folsom, Calif.	288.48	1.22	289.70
393	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	276.96	10.28	287.24
394	Canter Wealth	La Jolla, Calif.	286.61	0.00	286.61
395	FSA Advisors	Troy, Mich.	282.82	1.78	284.60
396	Integrated Capital Management	Bloomfield Hills, Mich.	283.16	0.00	283.16
397	Life Planning Partners	Jacksonville, Fla.	273.08	0.72	273.80
398	Centerline Wealth Advisors	Louisville, Ky.	258.49	2.51	261.00
399	Foresight Capital Management Advisors	Saline, Mich.	252.32	1.22	253.54
ASSET CATEGORY: \$150 MILLION TO < \$250 MILLION					
400	Kemp Financial Management	Fullerton, Calif.	0.00	230.00	230.00
401	Pearson Creek Capital Management	Chicago, Ill.	225.00	0.00	225.00
402	Kotys Wealth Professionals	Valparaiso, Ind.	223.43	0.00	223.43
403	Byrne Asset Management	Kingston, N.J.	210.87	0.00	210.87
404	Charleston Financial Advisors	Charleston, S.C.	206.09	4.62	210.71
405	TABR Capital Management	Orange, Calif.	203.44	0.00	203.44
406	RHS Financial	San Francisco, Calif.	190.44	7.66	198.11
407	Gold Medal Waters ‡	Boulder, Colo.	185.72	7.90	193.62
408	Center For Asset Management	Palm Beach Gardens, Fla.	193.34	0.00	193.34
409	Atwater Wealth Management	Boston, Mass.	190.05	2.61	192.66
410	Professional Financial Strategies	Pittsford, N.Y.	171.80	19.74	191.54
411	Westview Investment Advisors	Burlington, Vt.	178.83	1.63	180.46
412	Elderado Financial	Montrose, Colo.	172.27	0.00	172.27
413	Aldebaran Financial Insights	Kingsport, Tenn.	172.00	0.00	172.00
414	Lighthouse Wealth Management	Ashland, Ohio	170.42	0.00	170.42
415	Purtill Financial	Highland Heights, Ohio	0.00	166.49	166.49
416	Smith Bruer Advisors	Tallahassee, Fla.	107.76	51.84	159.60
417	Paragon Wealth Management	Provo, Utah	146.88	9.53	156.42
ASSET CATEGORY: < \$150 MILLION					
418	Ivy League Financial Advisors	Rockville, Md.	133.84	0.00	133.84
419	Steward Advisors	Chicago, Ill.	128.71	3.74	132.45
420	Strada Wealth Management	Austin, Texas	15.00	90.00	105.00
421	Meritas Advisors	San Rafael, Calif.	65.06	35.56	100.61
422	MTR Financial Services	Kingwood, Texas	97.74	0.00	97.74
423	Chilmark Financial Advisors	Miami, Fla.	84.83	0.00	84.83
424	The Leonard Financial Group	Riverside, Calif.	38.39	0.74	39.13
425	Safe Harbor Asset Management	Huntington, N.Y.	34.73	0.00	34.73
426	Venn Wealth & Benefit Services	Altoona, Pa.	20.62	1.59	22.21
427	Birch Investment Management	Brookings, S.D.	19.78	0.00	19.78
428	Aurora Strategic Advisors	Lumberton, N.C.	11.00	4.00	15.00
429	Old Oak Advisors	Vestavia Hills, Ala.	12.97	0.24	13.21
430	Atherean Wealth Management	Jersey City, N.J.	3.85	3.64	7.49
431	Carthage Financial Group	Braintree, Mass.	0.00	5.00	5.00

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