

TOP 100 RIA FIRMS

RANKING	COMPANY	LOCATION	AUM (000)	CLIENT ACCOUNTS	EMPLOYEES	INVESTMENT ADVISORS
1	Oxford Financial Group	Carmel, Ind.	\$12,452,105	6,460	130	30
2	Creative Planning	Leawood, Kan.	\$12,002,320	31,430	108	73
3	Shepherd Kaplan	Boston	\$10,408,294	1,774	45	20
4	Ronald Blue	Roswell, Ga.	\$7,827,707	16,606	302	144
5	Baker Street Advisors	San Francisco	\$5,200,000	1,300	28	6
6	Athena Capital Advisors	Lincoln, Mass.	\$5,095,081	421	43	23
7	Ballentine Partners	Waltham, Mass.	\$4,777,821	3,006	44	33
8	East End Advisors	New York	\$4,474,114	24	13	6
9	Savant Capital	Rockford, Ill.	\$4,096,656	3,251	90	34
10	RMB Capital Management	Chicago	\$3,977,663	10,362	75	37
11	Halbert Hargrove Global Advisors	Long Beach, Calif.	\$3,974,640	3,111	36	34
12	Strategic Capital Advisers	Denver	\$3,852,535	143	6	6
13	Symmetry Partners	Glastonbury, Conn.	\$3,840,000	22,102	79	9
14	Ferguson Wellman Capital Management	Portland, Ore.	\$3,834,351	2,120	40	17
15	Seven Post Investment Office	San Francisco	\$3,753,316	165	13	13
16	Altair Advisers	Chicago	\$3,729,037	478	36	20
17	Wetherby Asset Management	San Francisco	\$3,645,263	2,834	56	29
18	Douglas C. Lane	New York	\$3,598,063	3,670	31	8
19	Seven Bridges Advisors	New York	\$3,595,449	102	16	8
20	Federal Street Advisors	Boston	\$3,525,127	1,351	24	14
21	Gofen and Glossberg	Chicago	\$3,512,536	2,850	27	13
22	Mill Creek Capital Advisors	Conshohocken, Pa.	\$3,480,245	252	16	13
23	Homrich Berg	Atlanta	\$3,373,930	5,054	55	35
24	Bartlett	Cincinnati	\$3,305,437	2,693	45	15
25	W.E. Family Offices	Miami	\$3,260,857	63	36	17

Data gathered from Form ADV filings as of September 2014

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26	Evanson Asset Management	Carmel, Calif.	\$3,183,497	4,060	4	4
27	Signature Financial Management	Norfolk, Va.	\$3,133,138	978	32	17
28	Iron Capital Advisors	Atlanta	\$3,092,762	185	5	4
29	Cornerstone Advisors	Bellevue, Wash.	\$3,008,020	2,287	50	25
30	RegentAtlantic Capital	Morristown, N.J.	\$2,935,075	1,473	28	26
31	Northeast Financial Consultants	Westport, Conn.	\$2,860,985	1,999	4	2
32	Heck Capital Advisors	Rhinelander, Wis.	\$2,850,674	1,717	12	9
33	R. M. Davis	Portland, Maine	\$2,842,084	3,864	41	22
34	Dowling & Yahnke	San Diego	\$2,835,829	3,471	28	11
35	Conrad Siegel Investment Advisors	Harrisburg, Pa.	\$2,828,299	270	19	19
36	Orgel Wealth Management	Altoona, Wis.	\$2,807,028	6,247	11	8
37	Balasa Dinverno Foltz	Itasca, Ill.	\$2,769,206	4,026	23	23
38	Manchester Capital Management	Manchester, Vt.	\$2,594,886	1,225	29	12
39	Miller Investment Management	Conshohocken, Pa.	\$2,591,230	227	17	10
40	CM Wealth Advisors	Cleveland	\$2,551,821	135	15	7
41	WMS Partners	Towson, Md.	\$2,546,177	376	40	13
42	Threshold Group	Gig Harbor, Wash.	\$2,527,602	1,754	39	17
43	Brighton Jones	Seattle	\$2,517,021	819	50	20
44	Matter Family Office	St. Louis	\$2,487,712	176	23	14
45	Atherton Lane Advisers	Menlo Park, Calif.	\$2,446,583	653	34	25
46	Plancorp	St. Louis	\$2,431,345	4,452	30	24
47	RGT Capital Management	Dallas	\$2,337,000	3,596	42	29
48	South Texas Money Management	San Antonio	\$2,170,140	2,296	58	25
49	Paul Comstock Partners	Houston	\$2,054,199	148	8	7
50	Alesco Advisors	Pittsford, N.Y.	\$2,023,334	828	12	9

Source: Financial Media Group/AdvisorDatabases.com

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51	Meristem	Minnetonka, Minn.	\$2,002,245	320	40	18
52	Badgley Phelps	Seattle	\$1,988,142	1,270	20	9
53	Zemenick & Walker	St. Louis	\$1,965,574	171	10	7
54	Retirement Advisors of America	Addison, Texas	\$1,964,318	3,678	33	16
55	Budros, Ruhlin & Roe	Columbus, Ohio	\$1,957,583	5,597	40	20
56	LS Investment Advisors	Bloomfield Hills, Mich.	\$1,855,900	445	11	8
57	Rinet	Boston	\$1,855,341	1,473	34	17
58	Mainstay Capital Management	Grand Blanc, Mich.	\$1,852,989	3,735	21	11
59	Wescott Financial Advisory Group	Philadelphia	\$1,820,090	412	28	16
60	Pathstone Family Office	Fort Lee, N.J.	\$1,812,933	1,538	33	9
61	Heritage Investors Management	Bethesda, Md.	\$1,737,200	1,038	9	5
62	Laird Norton Wealth Management	Seattle	\$1,714,758	1,319	80	37
63	JMG Financial Group	Oak Brook, Ill.	\$1,703,519	2,062	33	32
64	McCutchen Group	Seattle	\$1,700,144	395	11	5
65	Palladium Registered Investment Advisors	Norfolk, Va.	\$1,694,468	1,561	22	8
66	Hartland	Cleveland	\$1,637,640	1,258	50	20
67	Truepoint	Cincinnati	\$1,615,363	3,759	27	16
68	Greenspring Wealth Management	Towson, Md.	\$1,586,779	197	8	6
69	Modera Wealth Management	Boston	\$1,586,612	3,696	30	19
70	Parsec Financial Management	Asheville, N.C.	\$1,563,998	4,035	16	15
71	TCI Wealth Advisors	Tucson, Ariz.	\$1,533,823	5,086	35	14
72	Miller Russell Associates	Phoenix	\$1,530,553	1,136	34	17
73	Mozaic	Beverly Hills, Calif.	\$1,525,368	52	8	6
74	Evensky & Katz	Miami	\$1,514,000	3,413	13	7
75	MDE Group	Morristown, N.J.	\$1,493,983	1,272	13	7

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76	Foster Group	West Des Moines, Iowa	\$1,455,992	2,828	33	18
77	Valeo Financial Advisors	Indianapolis	\$1,442,876	3,511	28	20
78	Destination Wealth Management	Walnut Creek, Calif.	\$1,419,440	3,637	24	16
79	Oakmont Partners	Boston	\$1,382,545	781	6	6
80	Texas Yale Capital	St. Petersburg, Fla.	\$1,380,468	97	10	4
81	Accredited Investors	Minneapolis	\$1,377,101	3,133	33	3
82	Chesley Taft	Chicago	\$1,373,921	1,318	11	7
83	North American Management	Boston	\$1,360,939	1,197	27	9
84	Sage Financial Group	Conshohocken, Pa.	\$1,357,003	2,587	17	15
85	Filament	Seattle	\$1,344,300	362	12	11
86	Morton Capital Management	Calabasas, Calif.	\$1,321,264	2,108	22	13
87	Boston Financial Management	Boston	\$1,319,511	1,068	35	13
88	Exencial Wealth Advisors	Oklahoma City	\$1,310,574	2,056	19	10
89	Sand Hill Global Advisors	Palo Alto, Calif.	\$1,307,607	717	18	11
90	Capital Directions	Atlanta	\$1,293,600	2,003	13	7
91	Sweetwater Investments	Redmond, Wash.	\$1,286,493	172	4	2
92	Brouwer & Janachowski	Tiburon, Calif.	\$1,279,693	1,359	17	8
93	Financial Clarity	Mountain View, Calif.	\$1,265,915	31	9	2
94	Windsor Financial Group	Minneapolis	\$1,264,810	721	12	9
95	Resource Consulting Group	Orlando, Fla.	\$1,262,335	1,678	14	9
96	Balentine	Atlanta	\$1,261,512	1,115	22	12
97	Palisades Hudson Financial Group	Scarsdale, N.Y.	\$1,254,521	112	15	15
98	Howland Capital	Boston	\$1,251,788	1,063	26	8
99	Patriot Wealth Management	Houston	\$1,249,718	1,581	13	12
100	Montag	Atlanta	\$1,245,623	1,036	23	14