

FINANCIAL ADVISOR

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SURVEY & RANKING 2020

FA's 2020 RIA RANKING

RAYMOND JAMES

2019 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2019 ASSETS (\$MM)*	% GROWTH IN ASSETS 2018-2019	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.	389,150.70	34.35%	\$36.50	-16.12%	60.18%
2	Edelman Financial Engines	Santa Clara, Calif.	299,000.00	26.52%	\$0.18	17.41%	7.76%
3	First Republic Investment Management	San Francisco, Calif.	87,280.52	11.48%	\$5.11	-13.35%	28.65%
4	Global Retirement Partners	San Rafael, Calif.	67,728.45	68.86%	\$5.79	29.64%	30.25%
5	Fort Washington Investment Advisors	Cincinnati, Ohio	63,058.13	19.24%	\$143.31	78.85%	-33.33%
6	Creative Planning	Overland Park, Kan.	47,920.12	30.48%	\$1.57	21.20%	7.65%
7	Mariner Wealth Advisors	Overland Park, Kan.	29,434.61	33.53%	\$1.38	-1.15%	35.09%
8	CIBC Private Wealth Management	Atlanta, Ga.	27,072.29	50.00%	\$3.43	44.68%	3.68%
9	Silvercrest Asset Management Group	New York, N.Y.	25,070.08	31.72%	\$31.73	18.05%	11.58%
10	Moneta Group Investment Advisors	St. Louis, Mo.	23,734.42	17.16%	\$4.74	9.02%	7.47%
11	Advanced Capital Group	Minneapolis, Minn.	23,440.41	2.92%	\$78.66	-11.58%	16.41%
12	Segall Bryant & Hamill	Chicago, Ill.	19,661.20	7.98%	\$8.39	-3.17%	11.52%
13	DiMeo Schneider & Associates	Chicago, Ill.	19,119.13	38.14%	\$42.96	27.28%	8.54%
14	BBR Partners	New York, N.Y.	17,886.90	12.59%	\$120.05	8.06%	4.20%
15	Veritable	Newtown Square, Pa.	17,348.68	15.49%	\$77.45	15.49%	0.00%
16	Tiedemann Advisors	New York, N.Y.	17,318.95	24.41%	\$40.94	19.71%	3.93%
17	Plante Moran Financial Advisors	Southfield, Mich.	17,273.98	20.48%	\$5.96	19.82%	0.56%
18	Mercer Advisors	Denver, Colo.	15,616.89	46.13%	\$1.29	24.12%	17.73%
19	Buckingham Strategic Wealth	Clayton, Mo.	15,523.33	4.11%	\$1.79	-5.66%	10.36%
20	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	15,512.94	43.46%	\$20.44	36.47%	5.12%
21	1919 Investment Counsel	New York, N.Y.	15,117.31	28.02%	\$10.57	37.60%	-6.96%
22	Wealth Enhancement Advisory Services	Plymouth, Minn.	13,820.00	64.92%	\$0.82	27.14%	29.71%
23	Newport Capital Group	Red Bank, N.J.	13,446.25	8.47%	\$74.29	-1.11%	9.70%
24	Boston Private Wealth	Boston, Mass.	13,315.70	96.13%	\$4.26	53.34%	27.91%
25	Johnson Investment Counsel	Cincinnati, Ohio	13,117.96	23.04%	\$3.50	14.69%	7.28%
26	Oxford Financial Group	Carmel, Ind.	13,097.23	18.58%	\$16.41	9.36%	8.42%
27	Aspiriant	Los Angeles, Calif.	12,758.73	9.33%	\$7.61	9.85%	-0.47%
28	Carson Wealth	Omaha, Neb.	12,552.30	67.30%	\$2.57	-31.55%	144.40%
29	Advanced Research Investment Solutions (ARIS)	Los Angeles, Calif.	12,092.11	11.78%	\$172.74	-5.79%	18.64%
30	The Colony Group	Boston, Mass.	11,550.82	51.53%	\$3.06	14.81%	31.99%
31	Wealthspire Advisors	New York, N.Y.	10,638.50	22.56%	\$3.17	17.41%	4.39%
32	Pathstone	Boston, Mass.	10,251.42	20.12%	\$35.23	18.47%	1.39%
33	Beacon Pointe Advisors	Newport Beach, Calif.	9,949.69	80.71%	\$2.29	-46.25%	236.20%
34	LeafHouse Financial	Austin, Texas	9,578.84	91.18%	\$5.95	37.24%	39.31%
35	Evercore Wealth Management	New York, N.Y.	9,196.87	21.65%	\$15.10	19.86%	1.50%
36	myCIO Wealth Partners	Philadelphia, Pa.	8,853.33	20.01%	\$11.71	16.20%	3.28%
37	RMB Capital	Chicago, Ill.	8,664.87	0.38%	\$4.81	1.66%	-1.26%
38	AE Wealth Management	Topeka, Kan.	8,583.74	83.06%	\$0.20	22.82%	49.05%
39	WE Family Offices	Miami, Fla.	8,537.56	15.33%	\$116.95	23.23%	-6.41%
40	TAG Associates	New York, N.Y.	8,349.62	3.66%	\$75.91	3.66%	0.00%
41	Mason Investment Advisory Services	Reston, Va.	8,330.74	28.01%	\$9.45	25.26%	2.20%
42	Signature Estate & Investment Advisors	Los Angeles, Calif.	8,253.80	-2.08%	\$0.99	-10.38%	9.26%
43	Allworth Financial	Sacramento, Calif.	8,095.77	134.41%	\$0.72	36.97%	71.14%
44	Ballentine Partners	Waltham, Mass.	7,927.99	23.40%	\$34.32	12.72%	9.48%
45	MAI Capital Management	Cleveland, Ohio	7,166.35	60.68%	\$4.69	1.73%	57.95%
46	Homrich Berg	Atlanta, Ga.	6,985.24	28.00%	\$3.49	18.40%	8.11%
47	EP Wealth Advisors	Torrance, Calif.	6,930.00	68.72%	\$1.26	10.44%	52.78%
48	CV Advisors	Aventura, Fla.	6,810.50	34.48%	\$86.21	34.48%	0.00%
49	Brighton Jones	Seattle, Wash.	6,799.75	28.31%	\$3.76	22.28%	4.94%
50	Mill Creek Capital Advisors	Conshohocken, Pa.	6,710.36	19.34%	\$20.40	18.61%	0.61%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. NM = not meaningful.

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FA's 2020 RIA RANKING

RAYMOND JAMES

2019 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2019 ASSETS (\$MM)*	% GROWTH IN ASSETS 2018-2019	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
51	GW & Wade	Wellesley, Mass.	6,700.57	13.03%	\$2.70	9.57%	3.15%
52	DBR & Co.	Pittsburgh, Pa.	6,676.59	1541.80%	\$7.65	1225.85%	23.83%
53	Tolleson Private Wealth Management	Dallas, Texas	6,630.00	19.18%	\$37.67	9.02%	9.32%
54	Bartlett Wealth Management	Cincinnati, Ohio	6,505.30	64.99%	\$3.22	-2.35%	68.95%
55	Cornerstone Advisors Asset Management	Bethlehem, Pa.	6,259.48	7.78%	\$11.86	-4.67%	13.06%
56	Ferguson Wellman Capital Management	Portland, Ore.	5,961.63	20.05%	\$7.03	17.79%	1.92%
57	Adviser Investments	Newton, Mass.	5,836.28	14.35%	\$1.53	13.24%	0.98%
58	Conrad Siegel Investment Advisors	Harrisburg, Pa.	5,834.05	12.66%	\$18.23	-10.22%	25.49%
59	RSM US Wealth Management	Minneapolis, Minn.	5,816.98	2.16%	\$1.57	4.15%	-1.91%
60	Monroe Vos Consulting Group	Houston, Texas	5,626.74	13.48%	\$56.84	7.75%	5.32%
61	Welch & Forbes	Boston, Mass.	5,589.93	21.81%	\$7.08	17.80%	3.40%
62	Kovitz Investment Group Partners	Chicago, Ill.	5,436.79	34.04%	\$2.72	7.23%	25.00%
63	Arlington Partners	Birmingham, Ala.	5,421.91	280.42%	\$44.44	218.05%	19.61%
64	Freestone Capital Management	Seattle, Wash.	5,401.93	15.19%	\$2.89	7.37%	7.29%
65	Wetherby Asset Management	San Francisco, Calif.	5,340.91	10.08%	\$9.55	6.93%	2.95%
66	Choate Investment Advisors	Boston, Mass.	5,146.99	14.50%	\$13.44	20.18%	-4.73%
67	Altair Advisers	Chicago, Ill.	5,097.47	16.07%	\$15.35	8.72%	6.75%
68	Ropes Wealth Advisors	Boston, Mass.	5,013.72	17.68%	\$4.34	12.39%	4.71%
69	Gofen and Glossberg	Chicago, Ill.	4,968.00	18.66%	\$5.22	14.41%	3.71%
70	CLA Wealth Advisors	Minneapolis, Minn.	4,935.14	36.48%	\$0.89	12.97%	20.81%
71	Valeo Financial Advisors	Indianapolis, Ind.	4,922.45	31.25%	\$3.08	18.94%	10.34%
72	RegentAtlantic Capital	Morristown, N.J.	4,900.76	36.22%	\$2.97	20.11%	13.41%
73	Joel Isaacson & Co.	New York, N.Y.	4,793.20	15.85%	\$4.08	8.46%	6.82%
74	Northside Capital Management	Hood River, Ore.	4,733.86	14.78%	\$157.80	3.30%	11.11%
75	Dowling & Yahnke	San Diego, Calif.	4,730.37	23.53%	\$3.72	16.54%	6.00%
76	Finaccess Advisors	Miami, Fla.	4,711.48	12.56%	\$56.09	7.20%	5.00%
77	Greenspring Advisors	Towson, Md.	4,689.19	33.78%	\$9.59	25.57%	6.54%
78	B O S	San Francisco, Calif.	4,627.34	14.06%	\$4.99	12.22%	1.64%
79	Sequoia Financial Group	Akron, Ohio	4,617.80	18.31%	\$1.37	19.68%	-1.14%
80	Forum Financial Management	Lombard, Ill.	4,547.95	39.39%	\$1.18	17.88%	18.25%
81	Plancorp	St. Louis, Mo.	4,538.74	23.66%	\$3.48	16.83%	5.84%
82	Balasa Dinverno Foltz	Itasca, Ill.	4,511.07	16.59%	\$3.90	28.69%	-9.40%
83	Retirement Planners of America	Plano, Texas	4,488.43	8.22%	\$0.50	4.85%	3.22%
84	RGT Wealth Advisors	Dallas, Texas	4,335.43	12.40%	\$7.53	10.45%	1.77%
85	Sullivan, Bruyette, Speros & Blayney	McLean, Va.	4,294.68	22.07%	\$3.94	17.14%	4.20%
86	GYL Financial Synergies	West Hartford, Conn.	4,262.11	11.39%	\$3.14	8.85%	2.34%
87	Bradley, Foster & Sargent	Hartford, Conn.	4,238.38	23.17%	\$2.89	18.38%	4.05%
88	Clarfeld Financial Advisors	Tarrytown, N.Y.	4,183.45	-31.45%	\$6.04	-35.71%	6.62%
89	Manchester Capital Management	Manchester, Vt.	4,164.26	21.56%	\$10.08	-25.83%	63.89%
90	Camden Capital	El Segundo, Calif.	4,089.06	28.81%	\$11.99	14.07%	12.91%
91	Edge Capital Group	Atlanta, Ga.	4,070.26	12.21%	\$15.65	12.21%	0.00%
92	Honkamp Krueger Financial Services	Dubuque, Iowa	4,052.38	28.21%	\$0.91	9.71%	16.87%
93	Index Fund Advisors	Irvine, Calif.	4,042.58	13.16%	\$1.65	14.97%	-1.57%
94	Brightworth	Atlanta, Ga.	4,034.37	20.95%	\$2.72	16.55%	3.78%
95	The Mather Group	Chicago, Ill.	3,988.82	2.99%	\$2.73	-19.71%	28.27%
96	Ingalls & Snyder	New York, N.Y.	3,967.66	4.64%	\$0.96	1.83%	2.76%
97	Cornerstone Advisors	Bellevue, Wash.	3,960.00	7.03%	\$6.09	15.26%	-7.14%
98	WMS Partners	Towson, Md.	3,956.94	7.53%	\$10.90	-1.36%	9.01%
99	Coldstream Wealth Management	Bellevue, Wash.	3,926.04	17.26%	\$2.84	13.02%	3.75%
100	Bailard	Foster City, Calif.	3,919.54	14.76%	\$5.04	12.84%	1.70%
101	SignatureFD	Atlanta, Ga.	3,911.27	11.94%	\$3.08	-2.79%	15.15%

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102	Linscomb & Williams	Houston, Texas	3,844.53	36.88%	\$1.96	9.84%	24.62%
103	HBKS Wealth Advisors	Erie, Pa.	3,718.91	7.86%	\$0.69	0.01%	7.84%
104	Wipfli Financial Advisors	Milwaukee, Wis.	3,618.72	18.88%	\$1.90	13.03%	5.18%
105	TCG Advisors	Austin, Texas	3,602.90	27.88%	\$2.40	-6.22%	36.36%
106	Geller Advisors	New York, N.Y.	3,560.48	13.20%	\$37.09	-2.13%	15.66%
107	Spire Wealth Management	Reston, Va.	3,495.59	10.74%	\$0.67	-5.53%	17.22%
108	Carroll Financial Associates	Charlotte, N.C.	3,486.02	41.48%	\$0.70	43.94%	-1.71%
109	Wilbanks, Smith & Thomas Asset Management	Norfolk, Va.	3,424.74	20.22%	\$1.75	17.15%	2.63%
110	Allegheny Financial Group	Pittsburgh, Pa.	3,414.48	34.64%	\$0.93	-25.84%	81.55%
111	Crescent Grove Advisors	Lake Forest, Ill.	3,414.44	18.18%	\$13.18	-10.57%	32.14%
112	TFO Phoenix	Phoenix, Ariz.	3,409.65	23.04%	\$18.53	0.30%	22.67%
113	Truepoint Wealth Counsel	Cincinnati, Ohio	3,377.15	23.64%	\$3.21	20.58%	2.53%
114	JMG Financial Group	Downers Grove, Ill.	3,327.00	24.37%	\$3.18	1.92%	22.03%
115	Northeast Financial Consultants	Westport, Conn.	3,319.70	24.72%	\$14.69	16.45%	7.11%
116	Crestwood Advisors Group	Boston, Mass.	3,291.99	82.12%	\$4.28	-9.89%	102.10%
117	Frontier Investment Management Company	Dallas, Texas	3,286.84	30.06%	\$1.81	10.98%	17.19%
118	Cassaday & Company	McLean, Va.	3,280.16	36.77%	\$1.59	29.07%	5.96%
119	Clifford Swan Investment Counselors	Pasadena, Calif.	3,254.00	17.22%	\$4.14	15.58%	1.42%
120	Zhang Financial	Portage, Mich.	3,217.72	15.62%	\$2.23	4.80%	10.32%
121	Advisors Capital Management	Ridgewood NJ	3,196.35	49.92%	\$1.33	27.43%	17.65%
122	Badgley Phelps Wealth Managers	Seattle, Wash.	3,195.69	28.35%	\$4.45	20.30%	6.69%
123	Covington Capital Management	Los Angeles, Calif.	3,138.27	22.74%	\$6.40	23.75%	-0.81%
124	ARGI Investment Services	Louisville, Ky.	3,120.77	44.30%	\$0.84	32.50%	8.91%
125	Beacon Capital Management	Dayton, Ohio	3,077.75	11.57%	\$0.30	16.71%	-4.41%
126	Westmount Asset Management	Los Angeles, Calif.	3,062.87	16.18%	\$2.30	3.24%	12.53%
127	Oberweis Asset Management	Lisle, Ill.	3,062.04	9.12%	\$102.07	12.76%	-3.23%
128	Telemus Capital	Southfield, Mich.	3,059.60	18.13%	\$2.44	17.19%	0.81%
129	Sowell Management	North Little Rock, Ark.	3,057.18	42.64%	\$0.38	-0.32%	43.09%
130	Parallel Advisors	San Francisco, Calif.	3,051.50	27.85%	\$1.37	17.99%	8.35%
131	Parsec Financial	Asheville, N.C.	2,992.24	22.52%	\$1.67	13.64%	7.81%
132	TCI Wealth Advisors	Tucson, Ariz.	2,973.41	20.66%	\$1.29	13.69%	6.14%
133	Advance Capital Management	Southfield, Mich.	2,955.34	17.64%	\$0.51	12.38%	4.68%
134	HM Capital Management	Clayton, Mo.	2,951.90	38.51%	\$22.71	26.79%	9.24%
135	Brookstone Capital Management	Wheaton, Ill.	2,950.00	25.53%	\$0.16	18.92%	5.56%
136	CM Wealth Advisors	Beachwood, Ohio	2,937.69	11.17%	\$17.80	12.52%	-1.20%
137	Grimes & Company	Westborough, Mass.	2,900.03	22.03%	\$1.10	13.82%	7.22%
138	Kovack Advisors	Fort Lauderdale, Fla.	2,896.16	28.08%	\$0.34	11.90%	14.46%
139	Hamilton Capital	Columbus, Ohio	2,813.69	22.61%	\$1.32	14.74%	6.86%
140	Heritage Investors Management Corp.	Bethesda, Md.	2,792.00	20.29%	\$4.17	20.47%	-0.15%
141	Capital Directions	Atlanta, Ga.	2,789.10	27.51%	\$1.60	2.47%	24.43%
142	FL.Putnam Investment Management Company	Wellesley Hills, Mass.	2,785.37	60.40%	\$3.08	1.91%	57.39%
143	Merriman Wealth Management	Seattle, Wash.	2,771.01	13.70%	\$1.21	17.86%	-3.53%
144	Modera Wealth Management	Westwood, N.J.	2,746.15	14.83%	\$1.96	-0.15%	15.00%
145	SYM Financial Advisors	Winona Lake, Ind.	2,743.37	17.81%	\$2.41	11.49%	5.67%
146	Budros, Ruhlin & Roe	Columbus, Ohio	2,732.67	19.00%	\$3.49	13.99%	4.39%
147	Berman Capital Advisors	Atlanta, Ga.	2,719.35	19.46%	\$13.14	8.49%	10.11%
148	Warren Averett Asset Management	Birmingham, Ala.	2,716.10	18.26%	\$2.23	13.99%	3.74%
149	Strategic Wealth Partners Group	Deerfield, Ill.	2,680.19	28.62%	\$3.94	23.52%	4.13%
150	Mainstay Capital Management	Grand Blanc, Mich.	2,675.67	17.92%	\$0.73	17.54%	0.33%
151	Cary Street Partners Investment Advisory	Richmond, Va.	2,667.37	50.13%	\$0.59	-2.26%	53.61%
152	MRA Associates	Phoenix, Ariz.	2,646.06	14.08%	\$3.70	10.42%	3.32%

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153	Pure Financial Advisors	San Diego, Calif.	2,611.77	22.70%	\$1.01	8.28%	13.32%
154	Lake Street Advisors Group	Portsmouth, N.H.	2,608.13	26.82%	\$50.16	21.95%	4.00%
155	Annex Wealth Management	Elm Grove, Wis.	2,592.70	35.20%	\$0.56	23.10%	9.83%
156	Gradient Investments	Arden Hills, Minn.	2,585.61	32.34%	\$0.19	20.68%	9.66%
157	JFS Wealth Advisors	Hermitage, Pa.	2,579.35	16.95%	\$1.25	13.61%	2.94%
158	Mission Wealth Management	Santa Barbara, Calif.	2,575.70	36.71%	\$2.29	3.54%	32.04%
159	Halbert Hargrove Global Advisors	Long Beach, Calif.	2,539.39	8.37%	\$3.89	5.55%	2.67%
160	Chicago Partners Wealth Advisors	Chicago, Ill.	2,514.53	41.18%	\$2.51	-1.17%	42.86%
161	Wellesley Asset Management Inc.	Wellesley, Mass.	2,489.28	2.53%	\$1.53	8.09%	-5.14%
162	Bordeaux Wealth Advisors	Menlo Park, Calif.	2,476.12	16.06%	\$18.62	4.72%	10.83%
163	Reynders, McVeigh Capital Management	Boston, Mass.	2,472.22	28.17%	\$3.64	20.26%	6.58%
164	Carnegie Investment Counsel	Pepper Pike, Ohio	2,445.00	33.10%	\$1.29	15.58%	15.15%
165	Frontier Wealth Management	Kansas City, Mo.	2,443.14	9.75%	\$1.53	6.32%	3.23%
166	Exencial Wealth Advisors	Oklahoma City, Okla.	2,368.00	17.29%	\$2.47	19.49%	-1.84%
167	Fairview Capital Investment Management	Greenbrae, Calif.	2,351.64	28.68%	\$12.58	21.11%	6.25%
168	Foster Group	West Des Moines, Iowa	2,348.98	16.45%	\$1.65	5.54%	10.33%
169	Accredited Investors Wealth Management	Edina, Minn.	2,297.52	22.90%	\$4.50	17.13%	4.93%
170	Private Ocean Wealth Management	San Rafael, Calif.	2,294.49	14.45%	\$2.25	16.92%	-2.11%
171	Carlson Capital Management	Northfield, Minn.	2,275.19	27.93%	\$2.15	19.96%	6.64%
172	Capital Asset Advisory Services	Haslett, Mich.	2,234.89	17.56%	\$0.29	23.35%	-4.69%
173	Beaumont Financial Partners	Needham, Mass.	2,223.10	-45.63%	\$4.94	-48.65%	5.88%
174	PagnatoKarp	Reston, Va.	2,204.97	22.40%	\$5.70	6.27%	15.18%
175	SJS Investment Services	Sylvania, Ohio	2,199.76	17.79%	\$2.89	12.22%	4.96%
176	Sage Financial Group	Conshohocken, Pa.	2,195.00	25.07%	\$3.38	20.26%	4.00%
177	Genovese Burford & Brothers	Sacramento, Calif.	2,156.44	9.75%	\$1.39	0.04%	9.70%
178	AGW Capital Advisors	Tampa, Fla.	2,131.44	-2.93%	\$23.95	-8.38%	5.95%
179	Barrett Asset Management	New York, N.Y.	2,125.09	23.86%	\$3.13	19.31%	3.82%
180	Klingman & Associates	New York, N.Y.	2,124.98	19.75%	\$4.85	7.72%	11.17%
181	Wescott Financial Advisory Group	Philadelphia, Pa.	2,120.52	5.86%	\$4.35	1.73%	4.06%
182	GM Advisory Group	Melville, N.Y.	2,108.18	48.94%	\$4.67	36.72%	8.94%
183	G.W. Henssler & Associates Ltd.	Kennesaw, Ga.	2,104.88	19.10%	\$2.03	25.54%	-5.13%
184	Coastal Bridge Advisors	Westport, Conn.	2,098.89	0.06%	\$7.47	-6.34%	6.84%
185	Family Management Corporation	New York, N.Y.	2,057.75	15.46%	\$3.28	18.77%	-2.79%
186	Burney Company	Reston, Va.	2,055.69	22.49%	\$1.00	25.12%	-2.10%
187	Chicago Capital	Chicago, Ill.	2,043.96	28.74%	\$4.47	23.67%	4.10%
188	Morton Capital Management	Calabasas, Calif.	2,036.50	15.55%	\$2.08	12.13%	3.05%
189	Resource Consulting Group	Orlando, Fla.	2,030.37	15.58%	\$4.44	10.77%	4.34%
190	Zemenick & Walker	St Louis, Mo.	2,029.46	16.19%	\$9.27	14.07%	1.86%
191	Cardiff Park Advisors	San Marcos, Calif.	1,995.18	8.26%	\$4.99	1.49%	6.67%
192	Retirement Income Solutions	Ann Arbor, Mich.	1,966.61	14.79%	\$1.63	14.03%	0.67%
193	Birch Hill Investment Advisors	Boston, Mass.	1,963.40	25.54%	\$11.03	23.42%	1.71%
194	Polaris Greystone Financial Group	San Rafael, Calif.	1,954.29	22.80%	\$1.17	4.35%	17.68%
195	RINET Company	Boston, Mass.	1,945.30	6.70%	\$10.46	3.26%	3.33%
196	HoyleCohen	San Diego, Calif.	1,936.47	13.03%	\$1.66	11.10%	1.74%
197	Circle Wealth Management	Summit, N.J.	1,919.96	10.13%	\$17.94	-25.89%	48.61%
198	Northwest Asset Management	Mercer Island, Wash.	1,912.53	39.32%	\$1.21	70.92%	-18.49%
199	Courier Capital	Buffalo, N.Y.	1,908.73	17.06%	\$2.40	20.74%	-3.05%
200	Goelzer Investment Management	Indianapolis, Ind.	1,884.91	23.89%	\$3.27	18.08%	4.92%
201	LWW Advisors	Pittsford, N.Y.	1,884.02	5.10%	\$4.92	5.37%	-0.26%
202	Radnor Financial Advisors	Wayne, Pa.	1,871.07	16.89%	\$4.10	-7.21%	25.97%
203	MCF Advisors	Covington, Ky.	1,867.81	20.41%	\$3.04	12.57%	6.97%

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FA's 2020 RIA RANKING

RAYMOND JAMES

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204	Farr Miller & Washington	Washington, D.C.	1,864.44	23.48%	\$3.23	17.50%	5.09%
205	The Portfolio Strategy Group	White Plains, N.Y.	1,839.30	17.51%	\$5.00	2.82%	14.29%
206	Schneider Downs Wealth Management Advisors	Pittsburgh, Pa.	1,817.93	27.57%	\$2.94	14.17%	11.73%
207	IFG Advisory	Atlanta, Ga.	1,811.97	25.91%	\$0.35	4.88%	20.06%
208	Reilly Financial Advisors	La Mesa, Calif.	1,809.78	23.20%	\$1.86	13.73%	8.33%
209	6 Meridian	Wichita, Kan.	1,798.01	21.92%	\$2.27	13.45%	7.46%
210	Laird Norton Wealth Management	Seattle, Wash.	1,770.12	9.09%	\$2.33	4.49%	4.40%
211	Summitry	San Mateo, Calif.	1,769.26	11.54%	\$1.56	11.44%	0.09%
212	Cadinha & Co.	Honolulu, Hawaii	1,766.34	23.29%	\$0.39	3.83%	18.74%
213	Beirne Wealth Consulting Services	Shelton, Conn.	1,763.84	10.93%	\$4.55	57.25%	-29.45%
214	The Welch Group	Birmingham, Ala.	1,758.73	22.85%	\$1.75	22.37%	0.40%
215	LaSalle St. Investment Advisors	Elmhurst, Ill.	1,738.54	33.10%	\$0.51	19.49%	11.39%
216	Wealthcare Capital Management	Richmond, Va.	1,738.12	37.51%	\$0.52	-6.56%	47.17%
217	Baker Avenue Wealth Management	San Francisco, Calif.	1,736.23	5.67%	\$2.51	8.12%	-2.26%
218	CoastEdge Partners	La Jolla, Calif.	1,717.68	16.52%	\$20.21	-2.67%	19.72%
219	West Financial Services	McLean, Va.	1,716.70	15.84%	\$2.18	9.81%	5.50%
220	TrueWealth Management	Atlanta, Ga.	1,700.38	27.55%	\$2.88	22.81%	3.87%
221	Smith Salley & Associates	Greensboro, N.C.	1,691.46	22.76%	\$2.99	-1.10%	24.12%
222	Bridgewater Advisors Inc.	New York, N.Y.	1,656.27	25.12%	\$3.81	18.80%	5.33%
223	One Capital Management	Westlake Village, Calif.	1,648.80	19.58%	\$1.08	14.34%	4.58%
224	Capstone Financial Advisors	Downers Grove, Ill.	1,642.50	15.59%	\$3.21	12.19%	3.02%
225	Osborne Partners Capital Management	San Francisco, Calif.	1,632.49	12.94%	\$2.97	11.30%	1.48%
226	TrustCore Financial Services	Brentwood, Tenn.	1,630.80	6.92%	\$0.86	1.29%	5.56%
227	RTD Financial	Philadelphia, Pa.	1,628.23	9.47%	\$2.93	19.33%	-8.26%
228	Fairway Wealth Management	Independence, Ohio	1,617.45	17.64%	\$6.80	8.75%	8.18%
229	Altium Wealth Management	Purchase, N.Y.	1,614.00	34.17%	\$1.67	16.55%	15.12%
230	True North Advisors	Dallas, Texas	1,601.35	15.44%	\$2.89	14.40%	0.91%
231	Heritage Financial Services	Westwood, Mass.	1,601.00	13.39%	\$1.70	11.82%	1.40%
232	Belpointe Asset Management	Greenwich, Conn.	1,591.26	51.60%	\$0.33	8.39%	39.86%
233	Magnus Financial Group	New York, N.Y.	1,578.75	35.37%	\$2.58	15.02%	17.69%
234	Colorado Financial Management	Boulder, Colo.	1,576.99	4.10%	\$2.08	4.78%	-0.65%
235	Girard Advisory Services	King of Prussia, Pa.	1,574.20	37.61%	\$0.80	26.76%	8.55%
236	Capital Wealth Advisors	Naples, Fla.	1,565.39	39.20%	\$1.44	5.84%	31.52%
237	North American Management Corp.	Boston, Mass.	1,563.79	20.60%	\$3.81	23.54%	-2.38%
238	SFMG Wealth Advisors	Plano, Texas	1,546.62	17.84%	\$2.63	13.24%	4.06%
239	GHP Investment Advisors	Denver, Colo.	1,539.41	20.53%	\$1.83	14.35%	5.40%
240	Obermeyer Wood Investment Counsel	Aspen, Colo.	1,536.32	14.09%	\$3.01	12.97%	0.99%
241	Foster & Motley	Cincinnati, Ohio	1,535.90	17.89%	\$2.33	7.32%	9.85%
242	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	1,519.00	18.21%	\$1.77	11.32%	6.19%
243	ProVise Management Group	Clearwater, Fla.	1,509.93	16.48%	\$1.31	15.47%	0.88%
244	Guyasuta Investment Advisors	Pittsburgh, Pa.	1,495.50	4.98%	\$4.10	0.66%	4.29%
245	Legacy Wealth Management	Memphis, Tenn.	1,484.80	21.43%	\$1.36	12.55%	7.90%
246	AJ Wealth	New York, N.Y.	1,483.00	60.15%	\$6.80	46.19%	9.55%
247	Quadrant Capital Group	Cincinnati, Ohio	1,476.06	77.96%	\$7.00	3.74%	71.54%
248	Miracle Mile Advisors	Los Angeles, Calif.	1,475.56	5.42%	\$2.84	-0.05%	5.48%
249	Stonebridge Capital Advisors	Saint Paul, Minn.	1,475.02	20.15%	\$1.23	13.82%	5.56%
250	Larson Financial Group	Chesterfield, Mo.	1,471.57	17.52%	\$0.43	8.24%	8.58%
251	Greenwich Wealth Management	Greenwich, Conn.	1,465.20	8.21%	\$8.99	-2.41%	10.88%
252	Regal Investment Advisors	Kentwood, Mich.	1,464.00	22.92%	\$0.22	30.18%	-5.57%
253	CFS Investment Advisory Services	Totowa, N.J.	1,460.55	37.94%	\$3.07	19.06%	15.85%
254	Kingsview Partners	Grants Pass, Ore.	1,460.38	55.79%	\$0.52	42.94%	9.00%

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255	Sadoff Investment Management	Milwaukee, Wis.	1,460.34	6.40%	\$2.29	7.07%	-0.62%
256	CPS Investment Advisors	Lakeland, Fla.	1,460.26	32.92%	\$0.57	22.88%	8.17%
257	Lucia Capital Group	San Diego, Calif.	1,456.06	12.87%	\$0.35	10.23%	2.39%
258	CapTrust Financial Advisors	Holland, Mich.	1,444.27	40.01%	\$1.91	31.86%	6.18%
259	EFS Advisors	Cambridge, Minn.	1,424.07	15.13%	\$0.08	15.13%	0.00%
260	BLB&B Advisors	Montgomeryville, Pa.	1,421.46	36.70%	\$1.26	2.62%	33.22%
261	Financial Advisory Service, Inc.	Leawood, Kan.	1,409.51	6.44%	\$1.47	1.12%	5.26%
262	Valley National Financial Advisors	Bethlehem, Pa.	1,404.08	56.50%	\$0.66	47.44%	6.14%
263	Vigilant Capital Management	Portsmouth, N.H.	1,388.88	27.75%	\$3.72	12.34%	13.72%
264	Pinnacle Wealth Planning Services	Mansfield, Ohio	1,361.98	90.42%	\$1.88	59.08%	19.70%
265	Artemis Wealth Advisors	New York, N.Y.	1,352.04	12.16%	\$96.57	20.17%	-6.67%
266	Hardy Reed	Tupelo, Miss.	1,345.06	12.09%	\$4.82	9.27%	2.57%
267	LBMC Investment Advisors	Brentwood, Tenn.	1,339.60	25.86%	\$3.25	14.25%	10.16%
268	Cornerstone Advisory	Hunt Valley, Md.	1,332.67	26.04%	\$1.67	6.25%	18.63%
269	Altfest Personal Wealth Management	New York, N.Y.	1,315.00	8.68%	\$2.09	3.50%	5.00%
270	Ritholtz Wealth Management	New York, N.Y.	1,298.67	52.79%	\$1.17	-4.41%	59.83%
271	Biltmore Family Office	Charlotte, N.C.	1,292.94	-18.34%	\$23.53	-21.31%	3.77%
272	Abacus Planning Group	Columbia, S.C.	1,287.14	23.21%	\$5.28	19.67%	2.95%
273	Axxcess Wealth Management	Carlsbad, Calif.	1,286.64	65.44%	\$0.63	-29.04%	133.14%
274	Trumbower Financial Advisors	Bethesda, Md.	1,279.71	9.22%	\$6.56	7.54%	1.56%
275	McKinley Carter Wealth Services	Wheeling, W.Va.	1,272.39	26.73%	\$1.38	19.57%	5.99%
276	BerganKDV Wealth Management	Bloomington, Minn.	1,270.70	-9.17%	\$1.36	-14.43%	6.15%
277	Willow Creek Wealth Management	Sebastopol, Calif.	1,247.69	19.33%	\$2.23	15.49%	3.33%
278	Transform Wealth	Greenwood Village, Colo.	1,233.31	55.38%	\$0.73	-50.63%	214.71%
279	UMA Financial Services	Salt Lake City, Utah	1,223.89	22.66%	\$1.27	25.08%	-1.93%
280	C2P Capital Advisory Group	Westlake, Ohio	1,223.57	30.59%	\$0.39	19.45%	9.32%
281	Durbin Bennett Private Wealth Management	Austin, Texas	1,210.14	15.81%	\$5.50	7.91%	7.32%
282	Ashfield Capital Partners	San Francisco, Calif.	1,208.83	24.84%	\$12.59	22.24%	2.13%
283	Albion Financial Group	Salt Lake City, Utah	1,196.81	22.30%	\$1.66	8.35%	12.87%
284	WealthSource Partners	San Luis Obispo, Calif.	1,192.30	63.26%	\$0.76	62.01%	0.77%
285	Richard C. Young & Co.	Newport, R.I.	1,181.73	8.35%	\$1.80	2.74%	5.46%
286	Beard Harris	Dallas, Texas	1,168.17	8.94%	\$1.92	4.30%	4.45%
287	Condor Capital Management	Martinsville, N.J.	1,166.80	21.46%	\$1.61	22.80%	-1.09%
288	Novare Capital Management	Charlotte, N.C.	1,162.79	18.77%	\$3.08	13.12%	5.00%
289	Trilogy Capital	Huntington Beach, Calif.	1,161.19	32.39%	\$0.09	35.21%	-2.09%
290	Wealthquest Corporation	Cincinnati, Ohio	1,158.55	17.82%	\$0.95	11.07%	6.08%
291	Daintree Advisors	Boston, Mass.	1,151.29	10.99%	\$4.62	3.86%	6.87%
292	The Fiduciary Group	Savannah, Ga.	1,150.66	28.11%	\$2.16	20.42%	6.39%
293	Round Table Wealth Management	Westfield, N.J.	1,131.00	11.87%	\$4.73	3.44%	8.14%
294	Lee Financial	Dallas, Texas	1,124.60	10.69%	\$2.79	13.43%	-2.42%
295	ML&R Wealth Management	Austin, Texas	1,104.53	22.03%	\$2.18	9.73%	11.21%
296	Schechter Investment Advisors	Birmingham, Mich.	1,102.52	29.60%	\$4.41	14.05%	13.64%
297	Van Hulzen Asset Management	El Dorado Hills, Calif.	1,100.24	35.79%	\$1.38	18.81%	14.29%
298	TFC Financial Management	Boston, Mass.	1,082.07	19.65%	\$3.13	14.12%	4.85%
299	Kings Point Capital Management	Great Neck, N.Y.	1,081.13	37.00%	\$4.62	10.07%	24.47%
300	Main Street Research	Sausalito, Calif.	1,080.47	27.88%	\$2.25	38.53%	-7.69%
301	Patriot Investment Management	Knoxville, Tenn.	1,078.00	24.89%	\$0.68	23.09%	1.46%
302	United Asset Strategies	Garden City, N.Y.	1,069.69	22.54%	\$1.14	11.85%	9.56%
303	Austin Asset	Austin, Texas	1,039.70	22.94%	\$2.72	19.72%	2.69%
304	Sheaff Brock Investment Advisors	Indianapolis, Ind.	1,037.10	22.60%	\$0.94	13.97%	7.57%
305	Nadler Financial Group	Deerfield, Ill.	1,030.53	37.53%	\$1.40	39.58%	-1.47%

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306	BT Wealth Management	Atlanta, Ga.	1,025.78	11.04%	\$3.28	-1.38%	12.59%
307	Fiduciary Advisors	St. Louis, Mo.	1,021.71	11.08%	\$11.35	11.08%	0.00%
308	Warwick Partners	Bryan, Texas	1,017.01	25.00%	\$5.91	37.36%	-8.99%
309	The Cabana Group	Fayetteville, Ark.	1,016.41	67.17%	\$0.20	13.97%	46.68%
310	Ensemble Capital Management	Burlingame, Calif.	1,010.75	29.44%	\$5.00	24.96%	3.59%
311	BigSur Partners	Miami, Fla.	1,007.92	5.36%	\$53.05	5.36%	0.00%
312	Marcum Wealth	Mayfield Village, Ohio	1,005.92	41.96%	\$0.71	-17.64%	72.36%
313	Meyer Capital Group	Marlton, N.J.	1,005.00	18.63%	\$1.42	18.12%	0.42%
314	SAX Wealth Advisors	Clifton, N.J.	1,003.99	17.68%	\$1.40	4.75%	12.34%
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION							
315	HCR Wealth Advisors	Los Angeles, Calif.	996.79	7.06%	\$1.17	-1.46%	8.65%
316	SteelPeak Wealth	Woodland Hills, Calif.	994.06	43.09%	\$0.81	50.41%	-4.87%
317	Cable Hill Partners	Portland, Ore.	988.13	39.57%	\$1.50	27.07%	9.83%
318	Romano Wealth Management	Evanston, Ill.	987.89	14.87%	\$1.46	14.20%	0.59%
319	StraightLine Group	Troy, Mich.	986.94	6.99%	\$0.37	13.42%	-5.67%
320	RZH Advisors	Stamford, Conn.	984.00	23.46%	\$7.24	18.02%	4.62%
321	Paragon Capital Management	Denver, Colo.	963.73	18.01%	\$6.74	20.48%	-2.05%
322	Greene Wealth Management	Seattle, Wash.	958.76	12.12%	\$2.61	-1.59%	13.93%
323	Acorn Financial Advisory Services	Reston, Va.	956.10	18.00%	\$0.57	7.10%	10.17%
324	Narwhal Capital Management	Marietta, Ga.	952.04	28.17%	\$7.00	2.73%	24.77%
325	SilverOak Wealth Management	Edina, Minn.	950.60	25.02%	\$3.06	16.17%	7.61%
326	Bogart Wealth	McLean, Va.	947.97	26.71%	\$1.50	11.85%	13.29%
327	Per Stirling Capital Management	Austin, Texas	947.96	-13.42%	\$0.90	-22.48%	11.69%
328	The Advisory Group of San Francisco	San Francisco, Calif.	945.97	15.55%	\$5.77	15.55%	0.00%
329	Bitterroot Capital Advisors	Bozeman, Mont.	935.27	-6.10%	\$62.35	-6.10%	0.00%
330	Palisade Asset Management	Minneapolis, Minn.	931.29	8.53%	\$1.85	-1.59%	10.28%
331	The Retirement Planning Group	Leawood, Kan.	929.00	29.57%	\$0.77	7.97%	20.00%
332	TC Wealth Partners	Downers Grove, Ill.	901.16	124.19%	\$1.37	59.35%	40.69%
333	Madison Wealth Management	Cincinnati, Ohio	898.20	13.43%	\$1.88	10.58%	2.58%
334	Prudent Investor Advisors	Folsom, Calif.	896.02	21.84%	\$8.96	15.74%	5.26%
335	Professional Planning Group	Westerly, R.I.	895.40	18.46%	\$0.53	22.70%	-3.46%
336	Financial Synergies Wealth Advisors	Houston, Texas	894.71	16.44%	\$1.53	0.91%	15.38%
337	CJM Wealth Advisors	Fairfax, Va.	889.76	23.82%	\$0.40	16.46%	6.32%
338	Hemington Wealth Management	Falls Church, Va.	888.81	23.52%	\$1.94	11.92%	10.36%
339	YorkBridge Wealth Partners	New York, N.Y.	887.24	17.20%	\$3.40	12.71%	3.98%
340	Pettinga Financial Advisors	Evansville, Ind.	886.32	13.51%	\$1.47	2.97%	10.24%
341	Rockbridge Investment Management	Syracuse, N.Y.	879.00	24.15%	\$0.58	15.51%	7.48%
342	Weatherly Asset Management	Del Mar, Calif.	875.56	13.74%	\$2.51	21.23%	-6.18%
343	Corrigan Financial	Middletown, R.I.	863.48	17.33%	\$0.84	16.42%	0.79%
344	Oakwood Capital Management	Los Angeles, Calif.	855.87	9.23%	\$2.16	13.09%	-3.41%
345	BFSG	Irvine, Calif.	854.14	92.02%	\$1.29	31.51%	46.02%
346	Rather & Kittrell	Knoxville, Tenn.	851.69	16.96%	\$1.13	19.12%	-1.82%
347	Woodmont Investment Counsel	Nashville, Tenn.	841.61	17.70%	\$2.47	10.10%	6.90%
348	Sather Financial Group	Victoria, Texas	832.98	42.11%	\$2.23	40.59%	1.08%
349	Kiley Juergens Wealth Management	Olympia, Wash.	827.28	22.67%	N/A	N/A	N/A
350	Patton Albertson Miller Group	Chattanooga, Tenn.	821.65	78.96%	\$3.08	205.64%	-41.45%
351	WNY Asset Management	Williamsville, N.Y.	818.34	21.48%	\$0.30	-18.78%	49.56%
352	Smith Anglin Financial	Dallas, Texas	815.95	12.98%	\$0.92	7.62%	4.98%
353	Retirement Investment Advisors	Oklahoma City, Okla.	815.81	22.64%	\$0.67	19.11%	2.96%
354	Azzad Asset Management	Falls Church, Va.	812.46	32.16%	\$0.74	49.37%	-11.52%
355	Delegate Advisors	Chapel Hill, N.C.	811.13	2.08%	\$27.97	2.08%	0.00%

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2019 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2019 ASSETS (\$MM)*	% GROWTH IN ASSETS 2018-2019	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
356	Waddell & Associates	Memphis, Tenn.	805.03	16.43%	\$0.94	24.30%	-6.34%
357	Marquette Wealth Management	Minneapolis, Minn.	801.75	13.61%	\$5.98	10.22%	3.08%
358	J.L. Bainbridge & Co.	Sarasota, Fla.	800.00	29.03%	\$1.00	29.03%	0.00%
359	Beacon Financial Group	Dallas, Texas	798.77	15.91%	\$1.00	12.29%	3.22%
360	Rebalance	Palo Alto, Calif.	795.54	26.68%	\$1.21	26.10%	0.46%
361	SPC Financial	Rockville, Md.	790.05	25.80%	\$0.77	19.04%	5.68%
362	Medley & Brown	Ridgeland, Miss.	786.83	20.88%	\$1.51	20.65%	0.19%
363	Traphagen Investment Advisors	Oradell, N.J.	784.39	28.55%	\$0.60	19.77%	7.34%
364	DiNuzzo Private Wealth	Beaver, Pa.	780.26	22.56%	\$0.95	16.60%	5.11%
365	SB Capital Management	Encino, Calif.	780.22	5.23%	\$2.94	1.66%	3.52%
366	Cahaba Wealth Management	Atlanta, Ga.	773.26	30.39%	\$1.33	18.31%	10.21%
367	Versant Capital Management	Phoenix, Ariz.	772.60	-11.46%	\$1.79	5.76%	-16.28%
368	Financial Planning and Information Services	De Pere, Wis.	771.50	49.23%	\$0.77	41.02%	5.82%
369	Soundmark Wealth Management	Kirkland, Wash.	771.17	15.08%	\$1.54	4.26%	10.38%
370	Petersen Hastings Investment Management	Kennewick, Wash.	769.84	14.87%	\$1.09	9.99%	4.44%
371	Segment Wealth Management	Houston, Texas	768.65	26.55%	\$4.13	28.60%	-1.59%
372	Blue Chip Partners	Farmington Hills, Mich.	767.88	42.99%	\$1.60	27.77%	11.92%
373	Aveo Capital Partners	Englewood, Colo.	767.80	16.33%	\$0.77	11.31%	4.51%
374	Actuarial Consulting Group	Midlothian, Va.	763.20	26.58%	\$2.86	25.16%	1.14%
375	Apriem Advisors	Irvine, Calif.	760.19	9.00%	\$1.19	12.23%	-2.88%
376	PYA Waltman Capital	Knoxville, Tenn.	754.60	19.62%	\$2.27	11.71%	7.07%
377	REDW Wealth	Albuquerque, N.M.	753.78	13.84%	\$2.12	11.29%	2.30%
378	Burton Enright Welch	Walnut Creek, Calif.	751.39	20.33%	\$1.77	14.66%	4.94%
379	Delta Financial Group	Basking Ridge, N.J.	751.23	21.42%	\$1.23	13.08%	7.38%
380	Yeske Buie	San Francisco, Calif.	743.62	12.06%	\$2.81	11.64%	0.38%
381	TrinityPoint Wealth	Milford, Conn.	737.57	40.56%	\$1.09	3.61%	35.67%
382	Vision Capital Management	Portland, Ore.	728.17	20.38%	\$1.47	12.84%	6.68%
383	American Financial Advisors	Marietta, Ga.	727.36	19.31%	\$0.77	19.95%	-0.53%
384	Horan Capital Management	Hunt Valley, Md.	723.36	25.81%	\$1.04	31.05%	-4.00%
385	Shine Wealth Partners	Lone Tree, Colo.	720.54	21.38%	\$2.77	14.38%	6.12%
386	Triad Financial Advisors	Greensboro, N.C.	720.31	21.45%	\$1.06	18.78%	2.25%
387	Woodard & Company Asset Management Group	Bermuda Run, N.C.	717.00	21.94%	\$0.90	16.60%	4.58%
388	Hengehold Capital Management	Cincinnati, Ohio	707.90	19.98%	\$1.18	9.98%	9.09%
389	Sunrise Advisors	Leawood, Kan.	706.00	13.72%	\$1.20	6.00%	7.29%
390	Quadrant Private Wealth Management	Bethlehem, Pa.	696.22	14.72%	\$1.83	10.19%	4.11%
391	Vintage Financial Services	Ann Arbor, Mich.	696.00	14.40%	\$1.35	15.73%	-1.15%
392	PDS Planning	Dublin, Ohio	682.20	19.22%	\$1.25	16.82%	2.06%
393	HeadInvest	Portland, Maine	680.11	15.08%	\$1.85	0.66%	14.33%
394	Financial Advisory Corporation	Grand Rapids, Mich.	678.44	20.46%	\$3.52	17.34%	2.66%
395	Fusion Family Wealth	Woodbury, N.Y.	676.00	18.46%	\$2.65	16.13%	2.00%
396	Seasons of Advice Wealth Management	New York, N.Y.	675.46	18.26%	\$0.91	11.74%	5.83%
397	Janiczek Wealth Management	Denver, Colo.	675.09	39.32%	\$3.33	40.69%	-0.98%
398	Omnia Family Wealth	Aventura, Fla.	667.39	14.34%	\$9.81	-7.52%	23.64%
399	RW Investment Management	Boise, Idaho	663.86	4.08%	\$1.38	31.40%	-20.79%
400	Archford Capital Strategies	Swansea, Ill.	657.33	17.92%	\$1.07	1.43%	16.26%
401	New England Investment & Retirement Group	North Andover, Mass.	655.02	25.21%	\$0.89	26.91%	-1.34%
402	Evermay Wealth Management	Arlington, Va.	653.95	18.48%	\$1.90	15.73%	2.37%
403	Moisan Fitzgerald Tamayo	Orlando, Fla.	650.42	19.70%	\$1.10	13.84%	5.14%
404	Innovative Financial Management	Peoria, Ariz.	650.00	9.24%	\$1.44	-2.89%	12.50%
405	Ruggie Wealth Management	Tavares, Fla.	647.34	10.71%	\$1.21	5.95%	4.49%
406	Pinkerton Retirement Specialists	Coeur d' Alene, Idaho	645.80	44.15%	\$0.92	39.00%	3.70%

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FA's 2020 RIA RANKING

RAYMOND JAMES

2019 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2019 ASSETS (\$MM)*	% GROWTH IN ASSETS 2018-2019	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
407	Spectrum Management Group	Indianapolis, Ind.	644.26	23.10%	\$3.50	15.74%	6.36%
408	Red Door Wealth Management	Memphis, Tenn.	641.97	33.46%	\$1.71	7.12%	24.58%
409	HTG Investment Advisors	New Canaan, Conn.	641.61	18.46%	\$1.88	4.61%	13.25%
410	Meg Green & Associates	Plantation, Fla.	640.07	11.85%	\$0.91	7.86%	3.70%
411	ARS Wealth Advisors	St Petersburg, Fla.	637.42	26.70%	\$1.14	21.24%	4.50%
412	Inspire Investing	Hollister, Calif.	634.58	152.03%	\$0.99	122.11%	13.48%
413	Southern Financial Group	Birmingham, Ala.	631.71	17.95%	\$0.68	19.22%	-1.06%
414	Stage Harbor Financial	Needham, Mass.	631.46	28.51%	\$2.91	0.67%	27.65%
415	Premier Financial Group	Eureka, Calif.	626.41	19.13%	\$1.16	7.63%	10.68%
416	WorthPointe	San Diego, Calif.	623.85	38.21%	\$1.34	22.76%	12.59%
417	MJP Wealth Advisors	Farmington, Conn.	622.59	45.69%	\$1.00	31.70%	10.62%
418	Willis Johnson & Associates	Houston, Texas	605.33	29.50%	\$1.80	14.08%	13.51%
419	Blankinship & Foster	Solana Beach, Calif.	602.46	19.56%	\$2.30	11.34%	7.38%
420	PJS Investment Management	Cedarburg, Wis.	599.12	17.70%	\$2.05	17.70%	0.00%
421	Investec Wealth Strategies	Houston, Texas	597.78	12.43%	\$2.07	10.10%	2.12%
422	Northeast Financial Group	Tannersville, Pa.	595.51	18.42%	\$0.98	-0.73%	19.29%
423	Briaud Financial Advisors	College Station, Texas	593.79	10.02%	\$2.27	5.82%	3.97%
424	Ellis Investment Partners	Berwyn, Pa.	584.05	24.02%	\$0.96	14.84%	7.99%
425	Stevens Foster Financial Advisors	Bloomington, Minn.	581.63	0.00%	\$1.44	0.00%	0.00%
426	Financial Partners Capital Management	New York, N.Y.	575.87	23.54%	\$2.22	19.25%	3.60%
427	Rappaport Reiches Capital Management	Skokie, Ill.	574.70	23.87%	\$2.07	18.06%	4.92%
428	William Mack & Associates	Troy, Mich.	573.41	67.84%	\$1.13	67.84%	0.00%
429	CapSouth Wealth Management	Dothan, Ala.	568.83	24.92%	\$1.59	21.77%	2.59%
430	Total Wealth Planning	Cincinnati, Ohio	558.85	25.68%	\$1.49	18.97%	5.63%
431	Reagan Companies Asset Management	Marcellus, N.Y.	557.47	27.98%	\$1.04	17.48%	8.94%
432	Harris Financial Advisors	Torrance, Calif.	556.36	22.67%	\$1.38	16.58%	5.22%
433	The Wealth Collaborative	Westlake Village, Calif.	555.57	13.06%	\$2.63	9.85%	2.93%
434	Halpern Financial	Ashburn, Va.	554.61	35.42%	\$2.64	23.16%	9.95%
435	ClearRock Capital	Ketchum, Idaho	553.46	25.06%	\$1.98	22.82%	1.82%
436	The Arkansas Financial Group	Little Rock, Ark.	549.88	17.71%	\$1.77	15.81%	1.64%
437	Socius Family Office	Fort Lauderdale, Fla.	543.21	13.72%	\$4.53	8.03%	5.26%
438	Titleist Asset Management	San Antonio, Texas	536.99	57.97%	\$0.62	39.63%	13.13%
439	Virtue Capital Management	Brentwood, Tenn.	529.26	13.76%	\$0.09	-6.68%	21.90%
440	Omega Wealth Partners	Fort Worth, Texas	525.97	24.64%	\$1.91	13.31%	10.00%
441	Droms Strauss Wealth Management	St. Louis, Mo.	523.71	20.41%	\$1.59	9.46%	10.00%
442	Aegis Wealth Management	Bethesda, Md.	521.14	-0.15%	\$5.21	-0.15%	0.00%
443	Oarsman Capital	Milwaukee, Wis.	520.50	17.72%	\$0.70	17.88%	-0.13%
444	Summit Wealth Strategies	Chesterfield, Mo.	514.90	33.54%	\$0.25	-10.57%	49.32%
445	Hanson & Doremus Investment Management	Burlington, Vt.	511.89	22.15%	\$1.10	18.22%	3.32%
446	J.P. King Advisors	Walnut Creek, Calif.	511.40	14.82%	\$1.43	14.82%	0.00%
447	Aspen Capital Management	Boise, Idaho	510.97	20.40%	\$3.12	10.86%	8.61%
448	Corbenic Partners	Bethlehem, Pa.	509.67	34.47%	\$2.19	28.70%	4.48%
449	KMH Wealth Management	Victoria, Texas	508.61	21.03%	\$1.11	10.46%	9.57%
450	Diversified	Wilmington, Del.	507.92	56.81%	\$0.73	44.16%	8.78%
451	RS Crum	Newport Beach, Calif.	507.51	14.15%	\$1.79	7.32%	6.37%
ASSET CATEGORY: \$250 MILLION TO <\$500 MILLION							
452	Asset Management Group	Stamford, Conn.	498.54	21.42%	\$1.91	20.02%	1.16%
453	The L. Warner Companies	Timonium, Md.	494.10	17.31%	\$1.78	25.36%	-6.42%
454	Bernhardt Wealth Management	McLean, Va.	490.74	23.02%	\$1.69	18.35%	3.94%
455	Regatta Capital Group	El Segundo, Calif.	487.13	50.50%	\$0.70	38.21%	8.89%
456	FJY Financial	Reston, Va.	486.46	-4.93%	\$1.37	-8.41%	3.80%

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457	Frisch Financial Group	Melville, N.Y.	480.91	17.56%	\$1.02	9.32%	7.53%
458	Optima Asset Management	Dallas, Texas	478.92	5.74%	\$4.99	7.94%	-2.04%
459	Glass Jacobson Financial Group	Owings Mills, Md.	476.94	18.92%	\$0.95	7.03%	11.11%
460	SkyOak Wealth	Las Vegas, Nev.	474.00	31.67%	\$0.23	-20.85%	66.34%
461	Vestory	Bellevue, Wash.	466.91	19.84%	\$0.66	9.71%	9.23%
462	Investmark Advisory Group	Shelton, Conn.	459.26	17.11%	\$0.84	21.38%	-3.52%
463	BlueSky Wealth Advisors	New Bern, N.C.	453.24	14.17%	\$1.54	9.14%	4.61%
464	White Oaks Wealth Advisors	Minneapolis, Minn.	452.59	15.05%	\$1.76	20.42%	-4.46%
465	Efficient Wealth Management	The Woodlands, Texas	450.73	22.18%	\$2.17	9.84%	11.23%
466	Goodman Financial Corporation	Houston, Texas	448.22	16.03%	\$1.96	20.59%	-3.78%
467	Financial Management Strategies	Cleveland, Ohio	447.55	26.19%	\$0.34	12.34%	12.33%
468	Claro Advisors	Boston, Mass.	443.59	30.59%	\$0.85	17.36%	11.28%
469	Marotta Wealth Management	Charlottesville, Va.	442.62	21.09%	\$1.48	14.61%	5.65%
470	Litman Gregory Asset Management	Walnut Creek, Calif.	440.31	3.99%	\$9.06	-19.14%	28.61%
471	Asset Management Advisors	Houston, Texas	431.94	32.58%	\$4.75	23.84%	7.06%
472	Elser Financial Planning	Indianapolis, Ind.	430.69	29.20%	\$1.92	1.06%	27.84%
473	Tobias Financial Advisors	Plantation, Fla.	429.20	29.94%	\$1.88	16.26%	11.76%
474	J.W. Coons Advisors	Columbus, Ohio	425.89	17.12%	\$2.77	13.32%	3.36%
475	Level Financial Advisors	Amherst, N.Y.	425.11	22.04%	\$0.69	18.67%	2.84%
476	Net Worth Advisory Group	Sandy, Utah	410.39	25.89%	\$0.95	20.07%	4.84%
477	W.A. Smith Financial Group	Sheffield Village, Ohio	410.20	41.00%	\$0.36	33.11%	5.93%
478	Mirador Capital Partners	Pleasanton, Calif.	405.70	33.67%	\$1.01	0.26%	33.33%
479	Grand Wealth Management	Grand Rapids, Mich.	404.20	24.02%	\$2.85	18.78%	4.41%
480	Jentner Wealth Management	Akron, Ohio	401.21	16.19%	\$1.39	10.96%	4.71%
481	Woodward Financial Advisors	Chapel Hill, N.C.	394.65	5.24%	\$2.32	-0.95%	6.25%
482	Meritas Wealth Management	Larkspur, Calif.	388.98	33.66%	\$1.73	6.93%	25.00%
483	Hochman Cole Investment Advisors	Deerfield, Ill.	388.75	20.37%	\$1.89	6.93%	12.57%
484	Sikich Financial	Springfield, Ill.	386.57	-0.08%	\$0.51	N/A	N/A
485	Hopwood Financial Services	Reston, Va.	384.10	21.37%	\$1.65	11.47%	8.88%
486	HFG Wealth Management	The Woodlands, Texas	370.84	17.84%	\$1.51	14.49%	2.93%
487	Kraft Asset Management	Nashville, Tenn.	368.83	3.11%	\$1.61	-4.99%	8.53%
488	Gradient Capital Advisors	San Diego, Calif.	366.20	21.61%	\$0.89	19.84%	1.47%
489	Family Office Research	Bethesda, Md.	363.22	15.66%	\$5.77	4.65%	10.53%
490	Court Place Advisors	Ellicott City, Md.	358.38	22.35%	\$1.09	20.50%	1.54%
491	Century Wealth Management	Memphis, Tenn.	358.23	20.77%	\$5.87	16.81%	3.39%
492	Stordahl Capital Management	Englewood, Colo.	355.42	25.22%	\$1.45	20.11%	4.26%
493	The Goff Financial Group	Houston, Texas	353.75	21.17%	\$2.06	21.17%	0.00%
494	Mark Sheptoff Financial Planning	Glastonbury, Conn.	353.00	12.06%	\$0.97	2.85%	8.96%
495	Marin Financial Advisors	Larkspur, Calif.	351.68	7.15%	\$2.27	0.24%	6.90%
496	WJ Interests	Sugar Land, Texas	349.00	16.72%	\$1.69	9.96%	6.15%
497	Next Generation Wealth Management	Milwaukee, Wis.	346.68	12.80%	\$1.14	6.15%	6.27%
498	Pinnacle Financial Group	Western Springs, Ill.	344.97	21.08%	\$1.11	20.30%	0.65%
499	Resolute Financial	Newburyport, Mass.	343.20	27.25%	\$1.01	13.03%	12.58%
500	Heron Wealth	New York, N.Y.	342.68	9.07%	\$2.12	6.38%	2.53%
501	Clune & Associates	Chicago, Ill.	338.01	12.45%	\$2.01	9.11%	3.07%
502	Apex Financial Advisors	Yardley, Pa.	337.16	25.91%	\$2.44	24.08%	1.47%
503	Winch Financial	Appleton, Wis.	334.74	22.78%	\$0.42	22.93%	-0.13%
504	Abound Wealth Management	Franklin, Tenn.	334.06	86.39%	\$1.25	8.90%	71.15%
505	Align Wealth Management	Oklahoma City, Okla.	332.95	9.42%	\$1.31	-2.65%	12.39%
506	Carter Asset Management	Abilene, Texas	330.07	22.96%	\$0.64	20.58%	1.98%
507	Wechter Feldman Wealth Management	Parsippany, N.J.	325.38	18.47%	\$2.11	18.47%	0.00%

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508	Asset Planning	Cypress, Calif.	325.34	23.46%	\$1.07	18.61%	4.10%
509	Reston Wealth Management	Reston, Va.	323.52	31.31%	\$0.72	24.59%	5.39%
510	Carolina Wealth Management Inc.	Greenville, N.C.	323.20	30.32%	\$0.74	18.61%	9.87%
511	Rainey & Randall Investment Management	Celebration, Fla.	322.00	14.59%	\$2.01	7.43%	6.67%
512	Paragon Wealth Strategies	Jacksonville, Fla.	320.81	18.14%	\$1.15	9.70%	7.69%
513	Peak Financial Management	Wellesley, Mass.	315.62	16.57%	\$1.14	N/A	N/A
514	Arbor Wealth Management	Miramar Beach, Fla.	313.91	38.77%	\$0.95	21.16%	14.53%
515	Allodium Investment Consultants	Minneapolis, Minn.	312.92	22.48%	\$1.44	14.05%	7.39%
516	Duncan Williams Asset Management	Memphis, Tenn.	312.37	66.92%	\$0.96	55.07%	7.64%
517	Klaas Financial	Loves Park, Ill.	312.36	11.96%	\$0.27	20.88%	-7.38%
518	Rainier Financial Group	Seattle, Wash.	311.28	16.43%	\$1.30	17.40%	-0.83%
519	Cassady Schiller Wealth Management	Cincinnati, Ohio	310.15	27.30%	\$1.25	18.61%	7.33%
520	Pivotal Planning Group	Melville, N.Y.	307.89	12.56%	\$1.29	10.20%	2.14%
521	Perspective Wealth Partners	Boise, Idaho	306.23	37.58%	\$1.85	11.88%	22.96%
522	Asset Advisory Group	Kinnelon, N.J.	306.23	20.38%	\$2.04	12.35%	7.14%
523	Transitions Wealth Management	Denver, Colo.	303.44	18.77%	\$0.83	19.42%	-0.54%
524	QP Consulting	Takoma Park, Md.	302.51	24.97%	\$3.83	15.48%	8.22%
525	Wilsey Asset Management	San Diego, Calif.	299.25	44.67%	\$0.41	34.87%	7.27%
526	Goodpasture Gray	Nashville, Tenn.	298.87	122.11%	\$3.88	90.38%	16.67%
527	Heritage Way Advisors	Rockford, Ill.	298.22	22.60%	\$2.37	14.82%	6.78%
528	Regency Wealth Management	Ramsey, N.J.	296.48	-0.11%	\$1.45	-3.03%	3.02%
529	Branson, Fowlkes & Company	Houston, Texas	295.32	22.84%	\$1.87	16.62%	5.33%
530	Castle Wealth Advisors	Indianapolis, Ind.	295.03	4.51%	\$1.29	-8.78%	14.57%
531	Mission Creek Capital Partners	San Francisco, Calif.	294.09	37.28%	\$1.09	-20.17%	71.97%
532	McCarthy Asset Management	Redwood Shores, Calif.	291.94	17.47%	\$1.30	16.95%	0.45%
533	Wakefield Wealth Management	Englewood, Colo.	291.68	25.03%	\$1.94	26.70%	-1.32%
534	Fiduciary Wealth Management	Reston, Va.	289.62	56.11%	\$0.78	-6.42%	66.82%
535	Alpha Financial Advisors	Charlotte, N.C.	287.23	28.65%	\$1.39	21.81%	5.61%
536	Ballast	Lexington, Ky.	286.58	27.13%	\$0.90	23.54%	2.90%
537	Westover Capital Advisors	Wilmington, Del.	278.61	21.74%	\$1.57	22.43%	-0.56%
538	Hammond Iles Wealth Advisors	Wethersfield, Conn.	278.25	30.98%	\$0.32	16.36%	12.56%
539	Poehling Capital Management	Madison, Wis.	275.58	20.57%	\$0.86	24.34%	-3.03%
540	MFA Wealth	Pittsburgh, Pa.	274.50	27.20%	\$0.63	20.15%	5.87%
541	R. W. Roge & Company	Naples, N.Y.	273.11	16.94%	\$0.91	11.10%	5.26%
542	Morning Financial Advisors	Fremont, Calif.	272.81	28.32%	\$0.89	-0.71%	29.24%
543	Searcy Financial Services	Overland Park, Kan.	271.64	18.08%	\$1.57	19.44%	-1.14%
544	CTS Financial Group	Chicago, Ill.	267.19	2.77%	\$0.74	-1.24%	4.06%
545	Tim Looney Investments	Lake Mary, Fla.	266.26	21.03%	\$0.78	13.58%	6.56%
546	Horizon Wealth Advisors	Houston, Texas	265.16	12.07%	\$2.09	13.84%	-1.55%
547	Trinity Financial Advisors	Columbus, Ohio	263.63	22.68%	\$2.23	15.41%	6.31%
548	Integrated Wealth Management	Scottsdale, Ariz.	262.92	21.00%	\$0.71	10.89%	9.12%
549	RMR Wealth Advisors	Madison, Wis.	261.89	20.29%	\$1.88	10.77%	8.59%
550	The Doman Group	New York, N.Y.	257.87	22.04%	\$3.97	3.27%	18.18%
551	Mullooly Asset Management	Wall Township, N.J.	250.73	25.70%	\$0.37	30.57%	-3.73%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. NM = not meaningful.

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