

# RIA LEADERS 2024: TOP 150 FEE-ONLY RIA FIRMS

Data partner COMPLY produced the below rankings of fee-only registered investment advisors that provide financial planning services from SEC Form ADV filings in September using criteria designed by Financial Planning.

RANK	FIRM NAME	LOCATION	AUM	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
1	Moneta Group Investment Advisors	St. Louis	\$37,481,639,918	40,790	214	501
2	Chevy Chase Trust Company	Bethesda, MD	\$36,006,471,975	4,811	39	108
3	Evoke Advisors	Los Angeles	\$26,690,657,983	10,336	34	69
4	Savant Wealth Management	Rockford, IL	\$26,294,837,852	15,145	244	543
5	Clearstead; Hartland & Co.; Clearstead Advisory Solutions	Cleveland	\$22,368,771,314	11,645	28	190
6	EP Wealth Advisors	Torrance, CA	\$22,321,000,000	13,185	195	392
7	Cap Strat	Oakbrook Terrace, IL	\$19,147,821,636	2,100	5	22
8	Letko, Brosseau & Associates	Montreal	\$15,357,669,816	2,153	0	70
9	Homrich Berg	Atlanta	\$15,199,304,130	17,942	68	180
10	Aspiriant	Los Angeles	\$14,831,440,000	11,103	68	204
11	WE Family Offices	Coral Gables, FL	\$13,909,416,024	108	32	59
12	Modera Wealth Management	Westwood, NJ	\$12,532,443,204	18,992	106	200
13	Loring, Wolcott & Coolidge Fiduciary Advisors	Boston	\$11,611,790,589	3,392	10	104
14	IRA Group	Atlanta	\$11,497,961,224	597	13	16
15	The Mather Group	Chicago	\$10,508,543,012	15,974	91	163
16	Circle Wealth Management	Summit, NJ	\$10,174,361,288	958	8	20
17	Bridges Investment Management	Omaha, NE	\$9,882,583,283	2,646	28	76
18	CV Advisors	Aventura, FL	\$9,678,316,282	2,067	0	56
19	Fiduciary Counseling	St. Paul, MN	\$9,488,550,771	1,691	19	88
20	Valeo Financial Advisors	Carmel, IN	\$8,944,535,606	18,918	88	155
21	Ferguson Wellman Capital Management	Portland, OR	\$8,394,137,837	4,068	25	60
22	Prowell Financial Management	Exton, PA	\$8,343,637,084	325	3	4
23	Mill Creek Capital Advisors	Conshohocken, PA	\$8,201,352,376	2,081	27	43
24	Pinnacle Associates	New York	\$8,135,641,729	6,144	25	64
25	Conrad Siegel Investment Advisors	Harrisburg, PA	\$7,774,909,225	957	21	22

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26	Choate Investment Advisors	Boston	\$7,496,939,369	3,608	10	24
27	Seven Post Investment Office	San Francisco	\$7,490,083,963	215	14	21
28	Altair Advisers	Chicago	\$7,386,489,664	886	0	70
29	LNW	San Francisco	\$7,277,109,024	3,828	25	87
30	Bradley Foster & Sargent	Hartford, CT	\$7,253,462,025	4,439	9	49
31	Orgel Wealth Management	Altoona, WI	\$7,104,580,359	10,031	31	78
32	Parallel Advisors	San Francisco	\$7,076,381,972	19,694	63	111
33	Aureus Asset Management	Boston	\$6,956,163,094	842	3	13
34	H.M. Payson	Portland, ME	\$6,955,171,652	4,017	15	33
35	Greenspring Advisors	Towson, MD	\$6,896,367,899	4,625	27	39
36	Marcuard Family Office	Zurich	\$6,845,015,371	377	0	36
37	Soltis Investment Advisors	St. George, UT	\$6,821,969,061	3,884	45	72
38	Sepio Capital	Salt Lake City	\$6,672,033,386	1,963	15	24
39	Heck Capital Advisors	Rhineland, WI	\$6,656,170,303	3,566	16	20
40	Guided Choice Asset Management	Reno, NV	\$6,645,705,545	99,569	0	28
41	Plancorp	St. Louis	\$6,479,677,393	6,627	40	81
42	R.M. Davis	Portland, ME	\$6,315,757,763	5,680	19	57
43	Pure Financial Advisors	San Diego	\$6,292,814,320	17,762	56	139
44	FLPutnam	Lynnfield, MA	\$6,168,006,683	5,203	44	105
45	Dakota Wealth	Palm Beach Gardens, FL	\$6,122,964,202	9,080	54	84
46	Clear Investment Research	Alpharetta, GA	\$5,844,759,390	260	3	5
47	Zhang Financial	Portage, MI	\$5,728,071,112	6,243	16	40
48	Frontier Asset Management	Sheridan, WY	\$5,707,809,597	3,671	14	54
49	WMS Partners	Towson, MD	\$5,664,188,520	4,434	40	79
50	The Bollard Group	Boston	\$5,662,840,667	476	1	29

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51	Capital Advisors	Tulsa, OK	\$5,501,719,930	6,518	38	59
52	JMG Financial Group	Downers Grove, IL	\$5,415,853,000	5,079	37	63
53	KCM Investment Advisors	Greenbrae, CA	\$5,304,768,845	3,568	6	20
54	Greycourt & Co.	Pittsburgh	\$5,091,189,265	32	1	42
55	Andersen	McLean, VA	\$4,963,236,000	446	11	1861
56	Index Fund Advisors	Irvine, CA	\$4,954,888,558	7,193	18	55
57	Truepoint	Cincinnati	\$4,935,598,041	10,678	36	93
58	Evanson Asset Management	Carmel, CA	\$4,848,069,285	4,379	5	5
59	Dynamic Wealth Advisors	Phoenix	\$4,829,248,145	14,988	76	125
60	Callan Family Office	Radnor, PA	\$4,767,784,116	1,229	0	38
61	Balentine	Atlanta	\$4,691,282,848	3,512	8	56
62	Stonegate Investment Group	Birmingham, AL	\$4,648,684,884	2,572	11	13
63	LNW	Seattle, WA	\$4,633,920,693	2,613	38	96
64	Becker Capital Management	Portland, OR	\$4,613,776,609	1,893	16	33
65	Evergreen Capital Management	Bellevue, WA	\$4,550,315,616	2,924	23	36
66	Carnegie Investment Counsel	Pepper Pike, OH	\$4,519,647,788	7,293	36	58
67	Boston Financial Management	Boston	\$4,449,954,589	2,952	25	49
68	Alesco Advisors	Pittsford, NY	\$4,430,226,612	1,615	14	27
69	Veratis Advisors	Cary, NC	\$4,429,232,164	394	2	7
70	Moran Wealth Management	Naples, FL	\$4,266,886,768	10,644	26	44
71	Westmount Partners	Los Angeles	\$4,259,362,338	4,684	25	39
72	Hamilton Capital	Columbus	\$4,219,857,272	8,483	55	79
73	Northeast Financial	Westport, CT	\$4,149,434,633	1,537	2	8
74	SYM Financial Advisors	Winona Lake, IN	\$4,055,387,303	5,346	29	75
75	Finaccess Advisors	Miami	\$4,047,021,163	170	7	12

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76	Brownson, Rehmus & Foxworth	Chicago	\$4,026,359,067	3,496	13	25
77	Mainstay Capital Management	Grand Blanc, MI	\$4,024,422,798	3,483	14	31
78	Advance Capital Management	Southfield, MI	\$4,023,482,795	14,038	28	53
79	Heritage Wealth Advisors	Richmond, VA	\$4,001,734,968	1,493	17	35
80	The Clarius Group	Seattle	\$3,986,398,218	1,124	17	35
81	Certuity	North Palm Beach, FL	\$3,961,766,158	3,286	24	41
82	Stelac Advisory Services	New York	\$3,941,146,748	460	2	24
83	TFO Wealth Partners	Maumee, OH	\$3,932,496,226	4,670	35	65
84	Buckhead Capital Management	Atlanta	\$3,924,630,903	310	10	11
85	Moss Adams Wealth Advisors	Seattle	\$3,914,488,888	4,226	22	68
86	Constellation Wealth Advisors	Cincinnati	\$3,900,159,084	2,231	19	31
87	Clifford Swan Investment Counselors	Pasadena, CA	\$3,848,216,402	2,531	12	31
88	TFO Family Office Partners	Phoenix	\$3,824,063,292	1,868	28	75
89	Winthrop Capital Management	Carmel, IN	\$3,796,591,805	790	5	27
90	Southeast Asset Advisors	Thomasville, GA	\$3,747,179,661	1,345	9	14
91	Prio Wealth	Boston	\$3,737,800,709	1,765	12	28
92	The Pacific Financial Group	Bellevue, WA	\$3,734,718,964	18,773	21	67
93	Destination Wealth Management	Walnut Creek, CA	\$3,701,661,223	5,567	32	53
94	Heritage Investors Management	Bethesda, MD	\$3,663,856,037	1,391	8	20
95	Reynders, McVeigh Capital Management	Boston	\$3,654,847,964	757	22	36
96	Mozaic	Beverly Hills, CA	\$3,636,302,344	75	0	13
97	Crestone Asset Management	Boulder, CO	\$3,616,260,964	760	27	58
98	Salem Investment Counselors	Winston Salem, NC	\$3,614,716,454	2,879	8	20
99	Twin Focus Capital Partners	Boston	\$3,585,714,962	71	10	37
100	IWP Wealth Management	Denver	\$3,575,824,101	66	12	28

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101	ZWJ Investment Counsel	Atlanta	\$3,541,146,369	2,414	12	19
102	Chicago Capital	Chicago	\$3,525,460,783	1,847	9	14
103	Nordwand Advisors	Radnor, PA	\$3,492,631,540	109	7	7
104	Facet	Baltimore	\$3,487,386,982	32,588	86	191
105	Wescott Financial Advisory Group	Philadelphia	\$3,477,406,798	3,321	26	54
106	Yale Capital	St. Petersburg, FL	\$3,454,023,737	101	4	6
107	Willis Investment Counsel	Gainesville, GA	\$3,451,539,792	465	6	11
108	Sand Hill Global Advisors	Palo Alto, CA	\$3,443,771,282	1,963	14	32
109	Matter Family Office	Clayton, MO	\$3,389,721,779	234	18	44
110	Advisor Partners	Walnut Creek, CA	\$3,382,642,421	1,929	5	12
111	Accredited Investors Wealth Management	Edina, MN	\$3,359,362,288	4,519	4	52
112	Apella Wealth	West Hartford, CT	\$3,349,019,931	8,605	40	77
113	True North Advisors	Dallas	\$3,341,152,592	3,808	21	52
114	Three Bell Capital	Dallas	\$3,248,428,457	552	10	18
115	Foster Group	West Des Moines, IA	\$3,238,513,168	4,626	47	81
116	CM Wealth Advisors	Beachwood, OH	\$3,236,591,668	581	4	23
117	Sage Financial Group	West Conshohocken, PA	\$3,213,483,087	3,917	22	27
118	Lindbrook Capital	Calabasas, CA	\$3,193,035,807	2,639	8	10
119	Halbert Hargrove	Long Beach, CA	\$3,162,314,796	4,434	37	49
120	Goelzer Investment Management	Indianapolis	\$3,159,426,779	1,690	24	36
121	Abacus Wealth Partners	Santa Monica, CA	\$3,137,060,878	5,804	36	71
122	Pegasus Partners	Mequon, WI	\$3,085,009,209	3,329	9	22
123	Smith Salley Wealth Management	Greensboro, NC	\$3,061,316,134	2,327	17	19
124	Raub Brock Capital Management	Larkspur, CA	\$3,059,458,638	7,037	7	9
125	Sentry Advisors	San Francisco	\$3,007,884,326	577	4	4

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126	Evensky & Katz/Foldes Wealth Management	Coral Gables, FL	\$2,895,866,943	5,384	20	38
127	Biltmore Family Office	Charlotte, NC	\$2,892,462,654	981	11	20
128	BIP Wealth	Atlanta	\$2,833,854,777	7,272	36	57
129	Cardinal Capital Management	Winnipeg, NA	\$2,813,214,711	8,538	8	48
130	Wealth Management	Norfolk, NE	\$2,782,818,058	3,482	44	60
131	Howland Capital Management	Boston	\$2,776,205,185	1,819	9	32
132	Advus Financial Partners	Lake Mary, FL	\$2,764,389,643	1,168	11	18
133	The Welch Group	Birmingham, AL	\$2,759,780,587	3,957	21	23
134	Saratoga Research & Investment Management	Saratoga, CA	\$2,740,178,823	3,207	16	23
135	North Star Asset Management	Neenah, WI	\$2,727,420,238	3,090	0	21
136	Eversource Wealth Advisors	Birmingham, AL	\$2,694,361,660	8,119	40	59
137	Steele Capital Management	Dubuque, IA	\$2,692,631,181	4,060	11	14
138	The Burney Company	Reston, VA	\$2,680,712,693	4,284	27	42
139	New England Private Wealth Advisors	Wellesley, MA	\$2,678,964,904	2,742	7	18
140	Donaldson Capital Management	Evansville, IN	\$2,677,442,196	1,716	38	61
141	Morton Wealth	Calabasas, CA	\$2,645,038,579	3,523	29	55
142	Venturi Private Wealth	Austin, TX	\$2,636,747,981	3,926	18	30
143	Bogart Wealth	McLean, VA	\$2,619,324,099	6,495	17	36
144	Anchor Capital Advisors	Boston	\$2,611,786,469	3,183	17	46
145	Colony Family Offices	Charlotte, NC	\$2,600,638,955	559	5	14
146	BakerAvenue	San Francisco	\$2,592,685,051	2,688	24	38
147	Cobblestone Capital Advisors	Rochester, NY	\$2,577,480,524	3,163	22	41
148	Performance Wealth	Hinsdale, IL	\$2,546,960,341	1,995	9	13
149	Asset Dedication	San Francisco	\$2,538,962,898	6,692	7	7
150	Montag	Atlanta	\$2,507,016,690	1,234	12	25