

FINANCIAL ADVISOR

**FA**

KNOWLEDGE FOR THE SOPHISTICATED ADVISOR

July/August 2023 • [www.fa-mag.com](http://www.fa-mag.com)

SPONSORED BY

 Allspring

 Commonwealth



**FA's RIA  
Survey &  
Ranking  
2023**

FINANCIAL ADVISOR



# RIA Survey & Ranking 2023

Page 3 ..... 2023 Top 50 Fastest-Growing Firms

Page 4 ..... 2023 RIA Ranking

Page 15 ..... RIA's 2023 Discretionary & Non-Discretionary AUM

# FA's TOP 51 FASTEST-GROWING FIRMS

Firms with more than \$500 million in AUM

GROWTH RANK	FIRM NAME	LOCATION	2022 CLIENTS	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	% GROWTH IN ASSETS PER CLIENT
1	Palisade Asset Management	Minneapolis, Minn.	263	1,012.21	402.21%	388.85%
2	Catalyst Financial Partners	Boston, Mass.	139	547.29	195.33%	-12.89%
3	Wedmont Private Capital	West Chester, Pa.	215	984.07	96.29%	18.69%
4	Circle Wealth Management	Summit, N.J.	61	6,551.18	91.52%	85.24%
5	Connectus Wealth Advisers	Hunt Valley, Md.	5,200	6,773.79	74.52%	45.59%
6	Kowal Investment Group	Waukesha, Wis.	1,399	1,839.00	67.18%	51.41%
7	Cerity Partners	New York, N.Y.	11,327	40,433.57	51.38%	6.92%
8	Fermata Advisors	Sonoma, Calif.	800	733.00	47.78%	-26.11%
9	Perigon Wealth Management	San Francisco, Calif.	1,490	4,830.37	45.11%	1.96%
10	High Net Worth Advisory Group	Naples, Fla.	375	579.04	43.56%	-4.30%
11	Miracle Mile Advisors	Los Angeles, Calif.	1,500	4,130.63	39.79%	-2.14%
12	SignatureFD	Atlanta, Ga.	1,685	6,146.77	34.27%	23.91%
13	Shorepoint Capital Partners	Norwood, Mass.	382	618.34	31.29%	-5.83%
14	Dakota Wealth	Palm Beach Gardens, Fla.	1,746	2,548.15	30.61%	-14.87%
15	Souders Financial Advisors	Cincinnati, Ohio	900	697.06	27.82%	27.82%
16	Choreo	Minneapolis, Minn.	6,276	12,190.11	26.60%	-22.38%
17	Duncan Williams Asset Management	Memphis, Tenn.	586	632.03	26.10%	10.39%
18	Meritas Wealth Management	Larkspur, Calif.	245	560.57	23.32%	21.81%
19	Waverly Advisors	Birmingham, Ala.	2,650	5,510.88	23.32%	-34.15%
20	Sather Financial Group	Victoria, Texas	471	1,764.38	23.30%	19.90%
21	Red Door Wealth Management	Memphis, Tenn.	620	1,443.69	21.53%	15.84%
22	Mariner Wealth Advisors	Overland Park, Kan.	36,367	65,874.57	18.84%	-1.64%
23	CAPTRUST	Raleigh, N.C.	27,205	777,297.74	18.66%	-2.55%
24	Lido Advisors	Los Angeles, Calif.	4,703	13,102.07	18.55%	-8.19%
25	Bogart Wealth	McLean, Va.	1,226	2,282.22	18.55%	-0.98%
26	Financial Insights Wealth Management	Tacoma, Wash.	892	621.06	16.38%	-2.01%
27	AlphaCore Wealth Advisory	La Jolla, Calif.	995	1,497.53	16.01%	0.27%
28	Mayflower Advisors	Boston, Mass.	796	1,243.57	15.71%	28.65%
29	Falcon Wealth Planning†††	Ontario, Calif.	1,000	528.14	15.70%	-12.64%
30	Glassman Wealth Services	Vienna, Va.	355	1,907.22	14.73%	-2.40%
31	Homrich Berg	Atlanta, Ga.	3,695	12,528.31	13.04%	-12.41%
32	Wealthcare Capital Management	Richmond, Va.	4,212	2,603.04	12.47%	20.83%
33	Meyer Capital Group	Marlton, N.J.	800	1,484.00	11.89%	3.49%
34	Element Pointe Family Office	Miami, Fla.	38	636.74	11.40%	23.13%
35	Simon Quick Advisors	Morristown, N.J.	706	5,103.98	11.39%	-27.11%
36	Yale Capital Corp.	Saint Petersburg, Fla.	120	2,722.85	11.10%	8.32%
37	Glass Jacobson Wealth Advisors	Owings Mills, Md.	735	770.08	10.97%	-17.27%
38	Altium Wealth Management	Purchase, N.Y.	1,010	2,942.45	10.95%	2.60%
39	TrinityPoint Wealth	Milford, Conn.	1,007	1,149.03	10.84%	-15.13%
40	Marcum Wealth	Cleveland, Ohio	2,613	2,250.83	10.43%	2.65%
41	Pathstone	Englewood, N.J.	1,548	24,835.86	9.87%	-28.39%
42	Clarfeld Financial Advisors	Tarrytown, N.Y.	1,240	7,105.62	9.81%	-2.59%
43	MAI Capital Management	Cleveland, Ohio	7,069	15,773.43	9.64%	-25.81%
44	Schechter Investment Advisors	Birmingham, Mich.	721	2,847.05	9.56%	-9.73%
45	Chequers Financial Management	San Francisco, Calif.	175	642.94	8.88%	-12.89%
46	Connecticut Wealth Management	Farmington, Conn.	1,081	2,589.91	8.58%	-10.10%
47	Evermay Wealth Management	Arlington, Va.	418	799.52	8.51%	-8.10%
48	Fi3 Financial Advisors	Indianapolis, Ind.	183	657.21	8.42%	20.26%
49	Allworth Financial	Folsom, Calif.	19,500	14,880.81	7.97%	-14.05%
50	Capital Wealth Advisors	Naples, Fla.	1,333	2,177.94	7.88%	-8.22%
51	Wealthspire Advisors	New York, N.Y.	7,075	18,772.10	7.59%	-1.81%

††† Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error, and now appear on the Top Fastest-Growing Firms ranking. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited. For reprints of this PDF please contact Aaron Deyang at [FAMag@wrightsmedia.com](mailto:FAMag@wrightsmedia.com).

# FA's 2023 RIA RANKING

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
<b>ASSET CATEGORY: \$1 BILLION AND OVER</b>							
1	CAPTRUST	Raleigh, N.C.	777,297.74	18.66%	28.57	-2.55%	21.77%
2	Edelman Financial Engines	Boston, Mass.	241,970.18	-16.66%	0.18	-17.30%	0.76%
3	SageView Advisory Group	Newport Beach, Calif.	156,399.42	-11.31%	35.50	-25.52%	19.08%
4	Hightower Advisors	Chicago, Ill.	105,230.21	1.55%	2.39	-15.33%	19.94%
5	Fort Washington Investment Advisors	Cincinnati, Ohio	71,037.80	3.76%	137.67	-0.67%	4.45%
6	CIBC Private Wealth Advisors†††	Atlanta, Ga.	69,749.23	-5.46%	7.24	-12.46%	8.00%
7	Mariner Wealth Advisors	Overland Park, Kan.	65,874.57	18.84%	1.81	-1.64%	20.82%
8	Wealth Enhancement Advisory Services	Plymouth, Minn.	56,392.71	7.19%	1.15	-14.26%	25.02%
9	Cerity Partners	New York, N.Y.	40,433.57	51.38%	3.57	6.92%	41.59%
10	Fiducient Advisors	Chicago, Ill.	40,020.77	5.66%	62.73	-3.94%	10.00%
11	Kayne Anderson Rudnick Investment Mgmt.	Los Angeles, Calif.	33,531.27	-29.06%	1.26	-34.93%	9.01%
12	Moneta	St. Louis, Mo.	30,651.38	-6.80%	4.46	-13.65%	7.93%
13	Silvercrest Asset Management Group	New York, N.Y.	28,904.99	-10.57%	34.37	-7.06%	-3.78%
14	Evoke Advisors†	Los Angeles, Calif.	24,940.07	-2.04%	28.87	-9.41%	8.14%
15	Pathstone	Englewood, N.J.	24,835.86	9.87%	16.04	-28.39%	53.42%
16	Advanced Capital Group	Minneapolis, Minn.	24,700.48	-17.04%	72.22	-22.14%	6.54%
17	Cresset Asset Management	Chicago, Ill.	24,611.93	7.16%	9.79	-31.72%	56.93%
18	BBR Partners	New York, N.Y.	24,081.60	-7.26%	136.83	-8.32%	1.15%
19	Beacon Pointe Advisors	Newport Beach, Calif.	23,245.73	-1.81%	1.66	-12.45%	12.15%
20	Segall Bryant & Hamill	Chicago, Ill.	22,239.08	-13.27%	12.11	-13.89%	0.71%
21	Buckingham Strategic Wealth	Saint Louis, Miss.	22,079.59	-3.41%	1.78	-16.36%	15.49%
22	Carson Wealth	Omaha, Neb.	19,943.56	-0.03%	2.19	-12.09%	13.72%
23	AE Wealth Management	Topeka, Kan.	19,248.84	-1.99%	0.23	-18.72%	20.57%
24	The Colony Group	Boston, Mass.	18,829.21	1.02%	2.78	-12.81%	15.86%
25	Wealthspire Advisors	New York, N.Y.	18,772.10	7.59%	2.65	-1.81%	9.57%
26	1919 Investment Counsel	New York, N.Y.	17,378.99	-14.65%	9.41	7.81%	-20.84%
27	Bahl & Gaynor	Cincinnati, Ohio	17,102.53	-4.99%	20.46	-12.04%	8.01%
28	Plante Moran Financial Advisors	Southfield, Mich.	16,742.52	-15.55%	4.85	-19.54%	4.95%
29	Johnson Investment Counsel	Cincinnati, Ohio	16,313.91	-13.06%	3.46	-19.39%	7.85%
30	MAI Capital Management	Cleveland, Ohio	15,773.43	9.64%	2.23	-25.81%	47.79%
31	Oxford Financial Group	Carmel, Ind.	15,587.91	-8.65%	21.92	-10.71%	2.30%
32	Allworth Financial	Folsom, Calif.	14,880.81	7.97%	0.76	-14.05%	25.62%
33	Newport Capital Group	Red Bank, N.J.	14,665.99	-11.49%	63.77	-23.04%	15.00%
34	Savant Wealth Management †††	Rockford, Ill.	13,400.00	2.29%	1.39	-17.66%	24.22%
35	Lido Advisors	Los Angeles, Calif.	13,102.07	18.55%	2.79	-8.19%	29.13%
36	Aspiriant	Los Angeles, Calif.	12,969.47	-16.20%	5.90	-20.01%	4.76%
37	Homrich Berg	Atlanta, Ga.	12,528.31	13.04%	3.39	-12.41%	29.06%
38	Choreo	Minneapolis, Minn.	12,190.11	26.60%	1.94	-22.38%	63.10%
39	Appleton Partners	Boston, Mass.	12,139.35	-2.97%	1.78	-5.66%	2.85%
40	WE Family Offices	Miami, Fla.	12,056.43	-9.91%	113.74	-18.41%	10.42%
41	myCIO Wealth Partners	Philadelphia, Pa.	12,007.38	1.41%	13.88	-2.22%	3.72%
42	Signature Estate & Investment Advisors	Los Angeles, Calif.	11,665.90	-5.75%	0.68	-12.04%	7.15%
43	Evercore Wealth Management	New York, N.Y.	10,537.12	-13.51%	14.68	-17.25%	4.51%
44	Clearstead Advisors	Cleveland, Ohio	10,227.85	-8.89%	8.95	-12.72%	4.38%
45	Mason Investment Advisory Services	Reston, Va.	10,094.48	5.95%	10.72	1.68%	4.20%
46	CliftonLarsonAllen Wealth Advisors	Minneapolis, Minn.	10,090.00	-3.35%	1.55	-9.30%	6.56%
47	Gresham Partners	Chicago, Ill.	9,527.15	0.11%	78.74	-8.99%	10.00%
48	Brighton Jones	Seattle, Wash.	9,458.38	-5.89%	3.64	-12.81%	7.93%
49	Williams Jones Wealth Management	New York, N.Y.	9,325.07	-14.87%	6.73	-16.03%	1.39%

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-'22 and % Growth In Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.  
 For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).



# FA's 2023 RIA RANKING

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
50	IRA Group	Atlanta, Ga.	9,075.04	-7.85%	35.73	-10.02%	2.42%
51	GW & Wade	Wellesley, Mass.	8,902.73	-14.43%	2.53	-16.52%	2.50%
52	The Mather Group	Chicago, Ill.	8,718.72	1.62%	2.16	-21.35%	29.21%
53	CV Advisors	Aventura, Fla.	8,415.39	-10.54%	76.50	-15.42%	5.77%
54	Freestone Capital Management	Seattle, Wash.	8,221.07	-7.93%	3.30	-15.03%	8.36%
55	TAG Associates	New York, N.Y.	8,071.49	-15.00%	73.38	-15.00%	0.00%
56	Anchor Capital Advisors	Boston, Mass.	8,008.06	-18.21%	7.33	-16.72%	-1.80%
57	Mill Creek Capital Advisors	Conshohocken, Pa.	7,876.36	-16.54%	20.30	-21.48%	6.30%
58	Johnson Wealth	Racine, Wis.	7,746.24	-12.02%	5.02	-48.20%	69.86%
59	Tolleson Wealth Management	Dallas, Texas	7,593.00	-90.21%	35.99	-91.18%	11.05%
60	Brookstone Capital Management	Wheaton, Ill.	7,514.38	-10.54%	0.16	-13.32%	3.21%
61	Kovitz Investment Group Partners	Chicago, Ill.	7,293.64	-6.51%	3.27	-9.40%	3.19%
62	Clarfeld Financial Advisors	Tarrytown, N.Y.	7,105.62	9.81%	5.73	-2.59%	12.73%
63	Valeo Financial Services	Carmel, Ind.	7,103.71	-2.39%	4.13	11.44%	-12.41%
64	Douglas C. Lane & Associates	New York, N.Y.	7,045.88	-16.87%	5.57	-18.57%	2.10%
65	Forum Financial Management	Lombard, Ill.	7,005.56	-5.32%	1.40	-13.66%	9.66%
66	Conrad Siegel Investment Advisors	Harrisburg, Pa.	6,987.64	-8.27%	16.06	-20.08%	14.78%
67	Bartlett Wealth Management	Cincinnati, Ohio	6,948.87	-15.04%	2.97	-24.68%	12.81%
68	Welch & Forbes	Boston, Mass.	6,810.84	-12.76%	8.44	-10.92%	-2.06%
69	Modera Wealth Management	Westwood, N.J.	6,800.79	-2.15%	3.01	-14.23%	14.08%
70	Connectus Wealth Advisers	Hunt Valley, Md.	6,773.79	74.52%	1.30	45.59%	19.87%
71	Cornerstone Advisors Asset Management	Bethlehem, Pa.	6,637.58	-12.80%	14.21	-14.67%	2.19%
72	Circle Wealth Management	Summit, N.J.	6,551.18	91.52%	107.40	85.24%	3.39%
73	Wetherby Asset Management	San Francisco, Calif.	6,531.45	-0.62%	11.22	0.57%	-1.19%
74	Coldstream Wealth Management	Bellevue, Wash.	6,498.24	-9.99%	2.48	-18.41%	10.33%
75	Ropes Wealth Advisors	Marblehead, Mass.	6,498.20	-13.39%	4.80	-16.91%	4.24%
76	Adviser Investments	Newton, Mass.	6,450.16	-11.03%	1.62	-11.17%	0.15%
77	RMB Capital	Chicago, Ill.	6,370.89	-18.81%	2.67	-16.37%	-2.93%
78	SignatureFD	Atlanta, Ga.	6,146.77	34.27%	3.65	23.91%	8.36%
79	Altair Advisers	Chicago, Ill.	6,014.19	-10.01%	16.52	-13.47%	4.00%
80	Greenspring Advisors	Towson, Md.	6,000.12	-2.06%	5.28	-46.68%	83.68%
81	Caprock	Boise, Idaho	5,919.85	3.11%	20.34	-8.23%	12.36%
82	Joel Isaacson & Co.	New York, N.Y.	5,911.34	-12.48%	4.89	-13.64%	1.34%
83	Parallel Advisors	San Francisco, Calif.	5,708.13	4.87%	1.62	-17.80%	27.58%
84	Bradley, Foster & Sargent	Hartford, Conn.	5,629.52	-7.72%	3.02	-4.35%	-3.53%
85	Heck Capital Advisors	Rhineland, Wis.	5,620.33	-15.80%	4.86	-14.85%	-1.11%
86	Advisors Capital Management	Ridgewood, N.J.	5,601.71	4.78%	1.33	-18.90%	29.19%
87	Plancorp	St. Louis, Mo.	5,545.42	-8.76%	3.63	-12.88%	4.73%
88	Waverly Advisors	Birmingham, Ala.	5,510.88	23.32%	2.08	-34.15%	87.28%
89	WMS Partners	Towson, Md.	5,155.00	-9.15%	11.11	-8.56%	-0.64%
90	Simon Quick Advisors	Morristown, N.J.	5,103.98	11.39%	7.23	-27.11%	52.81%
91	Bailard	Foster City, Calif.	5,083.39	-9.76%	5.03	-22.18%	15.96%
92	Thrivent Advisor Network	Minneapolis, Minn.	5,058.43	-22.53%	0.44	-19.49%	-3.77%
93	HBKS Wealth Advisors	Erie, Pa.	4,991.76	-6.54%	0.88	-5.76%	-0.82%
94	First Foundation Advisors	Irvine, Calif.	4,985.28	-12.24%	3.21	-5.80%	-6.84%
95	Mission Wealth Management	Santa Barbara, Calif.	4,975.56	3.33%	2.09	-11.53%	16.80%
96	Beacon Capital Management	Dayton, Ohio	4,922.30	3.76%	0.41	-11.33%	17.02%
97	Perigon Wealth Management	San Francisco, Calif.	4,830.37	45.11%	3.24	1.96%	42.31%
98	Ingalls & Snyder	New York, N.Y.	4,757.49	-12.64%	1.08	-15.67%	3.59%
99	Wilbanks, Smith & Thomas Asset Mgmt.	Norfolk, Va.	4,754.54	-4.34%	1.84	-10.17%	6.48%

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-'22 and % Growth In Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited. For reprints of this PDF please contact Aaron Deyang at [FAmag@wrightsmedia.com](mailto:FAmag@wrightsmedia.com).

# FA's 2023 RIA RANKING



2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
100	Alesco Advisors	Pittford, N.Y.	4,700.91	-13.99%	9.38	-16.22%	2.66%
101	GYL Financial Synergies	West Hartford, Conn.	4,646.95	-12.60%	3.03	-8.84%	-4.12%
102	Northside Capital Management	Hood River, Ore.	4,635.69	-17.72%	115.89	-28.01%	14.29%
103	Sendero Wealth Management	San Antonio, Texas	4,515.99	-7.14%	15.52	-17.03%	11.92%
104	JMG Financial Group	Downers Grove, Ill.	4,501.00	-4.56%	3.09	-13.61%	10.48%
105	Zhang Financial	Portage, Mich.	4,464.46	-6.69%	2.51	-14.81%	9.53%
106	Shuster Advisory Group	Pasadena, Calif.	4,383.11	-0.81%	14.32	-43.27%	74.86%
107	Pure Financial Advisors	San Diego, Calif.	4,361.73	4.04%	1.23	-10.76%	16.59%
108	Index Fund Advisors	Irvine, Calif.	4,353.56	-11.83%	1.78	-14.49%	3.11%
109	Klingenstein Fields Advisors	New York, N.Y.	4,314.28	-17.47%	8.16	-17.31%	-0.19%
110	Fort Pitt Capital Group	Pittsburgh, Pa.	4,302.94	-13.93%	1.33	-19.63%	7.10%
111	F.L.Putnam Investment Management Co.	Wellesley, Mass.	4,302.70	-5.38%	2.57	-19.80%	17.98%
112	Linscomb & Williams	Houston, Texas	4,256.70	-12.29%	2.31	-15.67%	4.01%
113	Iron Capital Advisors	Atlanta, Ga.	4,225.02	-22.51%	24.28	-19.84%	-3.33%
114	Truepoint Wealth Counsel	Cincinnati, Ohio	4,210.57	-9.31%	2.41	-16.78%	8.97%
115	Palisade Capital Management	Fort Lee, N.J.	4,206.86	-23.73%	13.88	-32.79%	13.48%
116	Badgley Phelps Wealth Managers	Seattle, Wash.	4,206.19	-11.81%	4.60	-17.98%	7.53%
117	Annex Wealth Management	Elm Grove, Wis.	4,204.03	-8.54%	0.76	-13.53%	5.77%
118	Permanens Capital Partners	Charleston, S.C.	4,193.71	-6.18%	89.23	-12.17%	6.82%
119	Empirical Wealth Management	Seattle, Wash.	4,178.93	0.29%	2.35	-13.49%	15.93%
120	Grimes & Company	Westborough, Mass.	4,177.58	-5.58%	1.17	-13.29%	8.89%
121	Finaccess Advisors	Miami, Fla.	4,139.67	-6.89%	39.43	-0.69%	-6.25%
122	Miracle Mile Advisors	Los Angeles, Calif.	4,130.63	39.79%	2.75	-2.14%	42.86%
123	Crestwood Advisors Group	Boston, Mass.	4,057.19	-18.26%	4.64	-17.14%	-1.35%
124	Cassaday & Company	McLean, Va.	4,033.82	-13.20%	1.40	-18.43%	6.41%
125	Gradient Investments	Arden Hills, Minn.	4,017.97	-8.18%	0.19	-18.20%	12.25%
126	Bordeaux Wealth Advisors	Menlo Park, Calif.	4,006.68	-2.46%	20.98	12.86%	-13.57%
127	Crescent Grove Advisors	Lake Forest, Ill.	3,912.91	-10.15%	11.18	-15.28%	6.06%
128	Chicago Partners Wealth Advisors	Chicago, Ill.	3,900.92	4.68%	2.10	-19.13%	29.45%
129	Allegheny Financial Group	Pittsburgh, Pa.	3,789.86	-14.20%	1.16	-19.93%	7.15%
130	Exencial Wealth Advisors	Oklahoma City, Okla.	3,769.64	-13.55%	1.39	-16.65%	3.72%
131	Hamilton Capital	Columbus, Ohio	3,757.88	3.39%	1.41	-3.10%	6.71%
132	Brownson, Rehms & Foxworth	Chicago, Ill.	3,722.14	-13.42%	14.60	-23.26%	12.83%
133	Robertson Stephens Wealth Management	San Francisco, Calif.	3,694.03	-6.03%	3.55	-42.98%	64.82%
134	Kovack Advisors	Fort Lauderdale, Fla.	3,650.70	-19.72%	0.33	-29.19%	13.38%
135	Crestone Capital	Boulder, Colo.	3,646.52	-12.65%	17.04	-16.32%	4.39%
136	Certuity (formerly Camden Capital)	North Palm Beach, Fla.	3,641.79	-19.14%	8.00	-20.21%	1.34%
137	Clifford Swan Investment Counselors	Pasadena, Calif.	3,630.00	-13.30%	3.86	-13.95%	0.75%
138	Kingsview Wealth Management	Grants Pass, Ore.	3,584.12	2.78%	0.58	-19.98%	28.44%
139	Advance Capital Management	Southfield, Mich.	3,569.93	-12.28%	0.53	-14.45%	2.54%
140	Westmount Asset Management	Los Angeles, Calif.	3,565.63	-7.08%	2.61	-8.51%	1.56%
141	Callan Family Office††	Radnor, Pa.	3,540.97	NA	32.19	NA	NA
142	Mainstay Capital Management	Grand Blanc, Mich.	3,437.34	-10.92%	0.91	-9.17%	-1.93%
143	TCI Wealth Advisors	Tucson, Ariz.	3,431.53	-8.84%	1.25	-14.48%	6.59%
144	Axxcess Wealth Management	Carlsbad, Calif.	3,399.62	-5.26%	0.69	-12.02%	7.68%
145	Wescott Financial Advisory Group	Philadelphia, Pa.	3,386.14	-3.25%	6.51	-23.72%	26.83%
146	TFO Phoenix	Phoenix, Ariz.	3,340.45	-6.59%	14.15	-23.61%	22.28%
147	Retirement Planners of America	Plano, Texas	3,339.63	-30.49%	0.50	-13.48%	-19.67%
148	Merriman Wealth Management	Seattle, Wash.	3,297.16	-9.51%	1.39	-11.46%	2.20%
149	TFO-TDC dba TDC Investment Advisory	Maumee, Ohio	3,223.54	-9.22%	2.06	-13.69%	5.17%

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-'22 and % Growth In Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.  
 For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

# FA's 2023 RIA RANKING



2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
150	Family Management Corporation	New York, N.Y.	3,155.27	0.20%	5.06	16.42%	-13.93%
151	Heritage Investors Management Corporation	Bethesda, Md.	3,126.80	-13.53%	4.35	-13.77%	0.28%
152	Foster Group	West Des Moines, Iowa	3,083.30	-9.14%	1.69	-15.01%	6.90%
153	Constellation Wealth Advisors	Cincinnati, Ohio	3,047.34	0.97%	12.70	19.90%	-15.79%
154	Sand Hill Global Advisors	Palo Alto, Calif.	3,037.94	-15.72%	6.16	-25.98%	13.86%
155	True North Advisors	Dallas, Texas	3,006.40	4.69%	6.19	8.14%	-3.19%
156	Carlson Capital Management	Northfield, Minn.	2,993.36	-5.41%	2.38	-8.11%	2.94%
157	CM Wealth Advisors	Beachwood, Ohio	2,984.53	-15.55%	15.15	-23.26%	10.06%
158	JFS Wealth Advisors	Hermitage, Pa.	2,983.68	-15.59%	1.41	-16.54%	1.15%
159	Telemus Capital	Southfield, Mich.	2,972.20	-11.59%	1.80	-14.80%	3.77%
160	Accredited Investors Wealth Management	Edina, Minn.	2,956.36	-12.62%	4.99	-14.09%	1.72%
161	Altium Wealth Management	Purchase, N.Y.	2,942.45	10.95%	2.91	2.60%	8.14%
162	Sowell Management	North Little Rock, Ark.	2,892.76	3.57%	0.19	36.81%	-24.30%
163	Lake Street Advisors	Portsmouth, N.H.	2,888.38	-14.93%	32.82	-22.67%	10.00%
164	CreativeOne Wealth	Overland Park, Kan.	2,879.55	-11.16%	0.21	-21.46%	13.11%
165	AGW Capital Advisors	Tampa, Fla.	2,858.78	-6.15%	22.87	-15.16%	10.62%
166	Schechter Investment Advisors	Birmingham, Mich.	2,847.05	9.56%	3.95	-9.73%	21.38%
167	Abacus Wealth Partners	Santa Monica, Calif.	2,834.45	-17.38%	1.85	0.70%	-17.95%
168	GenTrust	Miami, Fla.	2,802.47	2.12%	9.07	-8.13%	11.15%
169	Bragg Financial Advisors	Charlotte, N.C.	2,798.67	-8.87%	7.00	NA	NA
170	The Wealth Consulting Group	Las Vegas, Nev.	2,795.80	-2.66%	0.38	-8.40%	6.27%
171	Klingman & Associates	New York, N.Y.	2,777.26	-10.99%	4.74	-16.46%	6.55%
172	HoyleCohen	San Diego, Calif.	2,739.82	-15.35%	1.89	-17.81%	2.99%
173	Halbert Hargrove	Long Beach, Calif.	2,735.03	-9.76%	3.40	-17.28%	9.09%
174	Beaumont Financial Partners	Needham, Mass.	2,726.50	-9.93%	4.74	-13.84%	4.55%
175	Yale Capital Corp.	Saint Petersburg, Fla.	2,722.85	11.10%	22.69	8.32%	2.56%
176	Smith Salley Wealth Management	Greensboro, N.C.	2,709.59	-0.28%	3.46	-7.78%	8.14%
177	Sage Financial Group	Conshohocken, Pa.	2,702.00	-8.10%	3.60	-13.00%	5.63%
178	Evensky Katz	Coral Gables, Fla.	2,640.71	-3.68%	2.46	-6.72%	3.27%
179	Henssler Financial	Kennesaw, Ga.	2,639.37	-4.91%	1.69	-13.58%	10.03%
180	Coastal Bridge Advisors	Westport, Conn.	2,620.18	-8.22%	8.14	-6.51%	-1.83%
181	Wealthcare Capital Management	Richmond, Va.	2,603.04	12.47%	0.62	20.83%	-6.92%
182	Connecticut Wealth Management	Farmington, Conn.	2,589.91	8.58%	2.40	-10.10%	20.78%
183	Dakota Wealth	Palm Beach Gardens, Fla.	2,548.15	30.61%	1.46	-14.87%	53.43%
184	IFG Advisory	Atlanta, Ga.	2,532.64	-5.91%	0.36	-28.60%	31.78%
185	The Welch Group	Birmingham, Ala.	2,522.23	2.95%	2.07	-1.94%	4.99%
186	GM Advisory Group	Melville, N.Y.	2,514.70	-19.95%	4.31	-23.38%	4.47%
187	Wellesley Asset Management	Wellesley, Mass.	2,394.52	-23.23%	1.32	-22.29%	-1.20%
188	Morton Wealth	Calabasas, Calif.	2,377.71	-1.60%	2.16	-4.81%	3.37%
189	MCF Advisors	Covington, Ky.	2,326.11	-13.71%	2.68	-18.19%	5.47%
190	XML Financial Group	Bethesda, Md.	2,323.03	2.89%	0.40	-64.13%	186.84%
191	Resource Consulting Group	Orlando, Fla.	2,316.72	-12.34%	4.31	-15.11%	3.27%
192	Bogart Wealth	McLean, Va.	2,282.22	18.55%	1.86	-0.98%	19.73%
193	Chicago Capital	Chicago, Ill.	2,257.87	-28.42%	3.83	-30.49%	2.97%
194	Marcum Wealth	Cleveland, Ohio	2,250.83	10.43%	0.86	2.65%	7.58%
195	Cardiff Park Advisors	Carlsbad, Calif.	2,206.30	-8.81%	5.84	-8.32%	-0.53%
196	Vigilant Wealth Management	Portland, Maine	2,200.86	-1.75%	4.37	-10.14%	9.33%
197	BakerAvenue Wealth Management	San Francisco, Calif.	2,200.00	4.76%	2.99	3.91%	0.82%
198	Capital Wealth Advisors	Naples, Fla.	2,177.94	7.88%	1.63	-8.22%	17.55%
199	Schneider Downs Wealth Mgmt. Advisors	Pittsburgh, Pa.	2,175.01	-12.01%	2.93	-16.99%	6.00%

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-'22 and % Growth In Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.  
 For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

# FA's 2023 RIA RANKING



2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
200	Team Hewins	Redwood City, Calif.	2,173.72	-11.24%	6.16	-18.28%	8.62%
201	FAS Wealth Partners	Leawood, Kan.	2,155.59	-10.60%	1.64	-17.29%	8.08%
202	Retirement Income Solutions	Ann Arbor, Mich.	2,145.73	-10.74%	1.70	-12.08%	1.53%
203	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	2,111.00	0.63%	1.82	-10.21%	12.08%
204	Gratus Capital	Atlanta, Ga.	2,103.07	-39.90%	2.11	-46.84%	13.05%
205	Birch Hill Investment Advisors	Boston, Mass.	2,064.58	-17.78%	11.10	-18.22%	0.54%
206	Arnerich Massena	Portland, Ore.	2,064.37	-24.92%	7.02	-16.49%	-10.09%
207	Chesley, Taft & Associates	Chicago, Ill.	2,059.31	-17.39%	5.57	-19.40%	2.49%
208	Regal Investment Advisors	Kentwood, Mich.	2,042.75	-0.74%	0.30	-13.94%	15.34%
209	Inspire Investing	Meridian, Idaho	2,031.61	2.36%	4.23	48.84%	-31.23%
210	SJS Investment Services	Sylvania, Ohio	2,028.89	-24.18%	2.26	-26.54%	3.22%
211	Osborne Partners Capital Management	San Francisco, Calif.	1,998.29	-10.92%	3.04	-11.60%	0.77%
212	Summitry	Foster City, Calif.	1,988.68	-16.52%	1.76	-12.31%	-4.81%
213	CPS Investment Advisors	Lakeland, Fla.	1,988.22	-8.50%	0.57	78.67%	-48.79%
214	GHP Investment Advisors	Denver, Colo.	1,984.69	-8.48%	1.91	-13.40%	5.69%
215	Foster & Motley	Cincinnati, Ohio	1,961.37	-4.68%	2.47	-9.36%	5.17%
216	Zemenick & Walker	Saint Louis, Mo.	1,959.09	-23.41%	8.48	-21.42%	-2.53%
217	CoreCap Advisors	Southfield, Mich.	1,957.27	2.53%	0.25	-17.87%	24.84%
218	LWV Advisors	Pittsford, N.Y.	1,933.79	-12.14%	4.14	-19.29%	8.86%
219	Heritage Financial Services	Westwood, Mass.	1,930.82	-13.35%	1.70	-19.37%	7.46%
220	RTD Financial Advisors	Philadelphia, Pa.	1,924.54	-12.18%	2.98	-9.46%	-3.01%
221	Certified Advisory Corp.	Altamonte Springs, Fla.	1,921.93	-11.79%	0.84	-16.14%	5.19%
222	Glassman Wealth Services	Vienna, Va.	1,907.22	14.73%	5.37	-2.40%	17.55%
223	Performance Wealth	Hinsdale, Ill.	1,901.03	-22.37%	6.79	-27.09%	6.46%
224	West Financial Services	McLean, Va.	1,898.69	-16.84%	2.08	-19.40%	3.17%
225	Courier Capital	Buffalo, N.Y.	1,898.01	-12.95%	2.25	-15.95%	3.57%
226	Obermeyer Wood Investment Counsel	Aspen, Colo.	1,886.99	-23.01%	3.02	-27.94%	6.84%
227	SFMG Wealth Advisors	Plano, Texas	1,884.95	-3.40%	2.88	-6.20%	2.99%
228	BLB&B Advisors	Montgomeryville, Pa.	1,878.94	-9.01%	1.47	-13.42%	5.09%
229	Kowal Investment Group	Waukesha, Wis.	1,839.00	67.18%	1.31	51.41%	10.42%
230	Capstone Financial Advisors	Downers Grove, Ill.	1,824.85	-13.06%	2.91	-21.64%	10.95%
231	Guyasuta Investment Advisors	Pittsburgh, Pa.	1,814.72	-8.62%	4.22	-13.29%	5.39%
232	CFS Investment Advisory Services	Totowa, N.J.	1,794.47	-13.87%	3.20	-15.41%	1.82%
233	Legacy Wealth Management	Memphis, Tenn.	1,778.42	-14.35%	1.36	-19.32%	6.16%
234	IPI Wealth Management	Decatur, Ill.	1,776.79	-5.68%	0.45	-20.41%	18.50%
235	Sather Financial Group	Victoria, Texas	1,764.38	23.30%	3.75	19.90%	2.84%
236	Stonebridge Capital Advisors	Saint Paul, Minn.	1,760.36	-2.47%	1.40	8.22%	-9.88%
237	Stokes Family Office	New Orleans, La.	1,732.06	-5.94%	2.78	-18.19%	14.97%
238	Lutz Financial	Omaha, Neb.	1,731.48	-4.79%	2.32	-9.25%	4.92%
239	Prosperity Capital Advisors	Westlake, Ohio	1,712.43	-3.30%	0.44	-12.71%	10.78%
240	Fairway Wealth Management	Independence, Ohio	1,652.49	-18.33%	6.21	-17.72%	-0.75%
241	LBMC Investment Advisors	Brentwood, Tenn.	1,623.66	-14.40%	3.33	-17.39%	3.62%
242	ProVise Management Group	Clearwater, Fla.	1,616.43	-8.64%	1.14	-10.96%	2.61%
243	Pinnacle Wealth Planning Services	Mansfield, Ohio	1,609.40	-19.20%	1.71	-24.70%	7.30%
244	Fairview Capital Investment Management	Greenbrae, Calif.	1,540.98	-6.40%	6.79	-12.17%	6.57%
245	ML&R Wealth Management	Austin, Texas	1,538.10	2.39%	2.18	-11.82%	16.12%
246	Conservest Capital Advisors	Wynnewood, Pa.	1,536.66	-4.76%	5.73	-8.66%	4.28%
247	Tom Johnson Investment Management	Oklahoma City, Okla.	1,519.43	-7.52%	7.91	-5.59%	-2.04%
248	Cornerstone Advisory	Hunt Valley, Md.	1,515.98	-10.94%	1.91	-4.87%	-6.38%
249	Van Hulzen Asset Management	El Dorado Hills, Calif.	1,513.03	-8.73%	1.45	-21.31%	15.98%

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-'22 and % Growth In Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.  
 For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).



# FA's 2023 RIA RANKING

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
250	Abacus Planning Group	Columbia, S.C.	1,507.41	-9.76%	5.02	-14.28%	5.26%
251	AlphaCore Wealth Advisory	La Jolla, Calif.	1,497.53	16.01%	1.51	0.27%	15.70%
252	Wealthquest	Cincinnati, Ohio	1,493.99	-10.75%	1.03	-14.02%	3.80%
253	California Financial Advisors	San Ramon, Calif.	1,489.95	-9.65%	1.13	-10.06%	0.46%
254	Meyer Capital Group	Marlton, N.J.	1,484.00	11.89%	1.86	3.49%	8.11%
255	Cabana Asset Management	Fayetteville, Ark.	1,476.78	-40.64%	3.90	-42.05%	2.43%
256	Red Door Wealth Management	Memphis, Tenn.	1,443.69	21.53%	2.33	15.84%	4.91%
257	Baltimore Washington Financial Advisors	Columbia, Md.	1,442.58	-7.59%	0.57	NA	NA
258	RKL Wealth Management	Lancaster, Pa.	1,431.85	0.11%	1.30	-20.85%	26.47%
259	Condor Capital Wealth Management	Martinsville, N.J.	1,429.53	-14.70%	1.97	-8.35%	-6.92%
260	Patriot Investment Management Group	Knoxville, Tenn.	1,414.83	-12.16%	0.75	-11.74%	-0.47%
261	Ensemble Capital Management	San Francisco, Calif.	1,410.95	-22.56%	4.52	-29.01%	9.09%
262	RZH Advisors	Stamford, Conn.	1,401.65	-7.54%	3.55	-12.93%	6.18%
263	Berger Financial Group	Plymouth, Minn.	1,400.00	-6.67%	0.47	-12.89%	7.14%
264	Beard Harris Wealth Management	Dallas, Texas	1,398.92	-8.13%	1.97	-8.13%	0.00%
265	Altfest Personal Wealth Management	New York, N.Y.	1,390.09	-10.62%	2.06	-13.93%	3.85%
266	Elser Financial Planning	Indianapolis, Ind.	1,379.85	-12.62%	4.02	-24.59%	15.88%
267	HCR Wealth Advisors	Los Angeles, Calif.	1,374.50	-5.29%	1.53	-1.40%	-3.95%
268	Rebalance	Bethesda, Md.	1,360.00	1.19%	2.00	-2.83%	4.13%
269	SilverOak Wealth Management	Edina, Minn.	1,354.80	2.73%	3.59	-2.45%	5.31%
270	Tschetter Group	Bellevue, Wash.	1,336.06	-11.37%	4.61	-20.23%	11.11%
271	3EDGE Asset Management	Naples, Fla.	1,332.68	-2.38%	1.69	-20.96%	23.51%
272	HUB Investment Advisors	Omaha, Neb.	1,315.10	0.27%	4.85	-26.00%	35.50%
273	Nottingham Advisors	Amherst, N.Y.	1,301.01	-7.03%	0.82	-1.85%	-5.28%
274	Narwhal Capital Management	Marietta, Ga.	1,296.30	-5.24%	4.63	-22.84%	22.81%
275	Diversified	Wilmington, Del.	1,289.65	4.43%	0.92	-17.53%	26.62%
276	SAX Wealth Advisors	Parsippany, N.J.	1,287.69	-5.38%	1.56	-11.22%	6.58%
277	Austin Asset	Austin, Texas	1,265.58	-7.35%	2.94	-9.50%	2.38%
278	Magnus Financial Group	New York, N.Y.	1,260.52	6.82%	1.43	-14.06%	24.29%
279	Diversified Portfolios	Bloomfield Hills, Mich.	1,253.46	-14.52%	2.28	-18.56%	4.96%
280	Atwood & Palmer	Kansas City, Mo.	1,251.94	-3.72%	6.26	-9.50%	6.38%
281	Smith Anglin Financial	Dallas, Texas	1,245.09	-4.81%	1.11	0.73%	-5.50%
282	Mayflower Advisors	Boston, Mass.	1,243.57	15.71%	1.56	28.65%	-10.06%
283	Bitterroot Capital Advisors	Bozeman, Mont.	1,228.72	1.82%	68.26	-3.83%	5.88%
284	TFC Financial Management	Boston, Mass.	1,226.53	-12.02%	3.22	-10.17%	-2.06%
285	Azzad Asset Management	Falls Church, Va.	1,225.89	-4.00%	0.80	-17.06%	15.76%
286	Per Stirling Capital Management	Westlake Hills, Texas	1,184.82	-13.71%	1.05	-16.76%	3.67%
287	Investment Counsel Company	Las Vegas, Nev.	1,180.74	-11.71%	3.80	-16.25%	5.42%
288	Segment Wealth Management	Houston, Texas	1,171.64	-3.20%	5.61	-11.54%	9.42%
289	Bloom Advisors	Farmington Hills, Mich.	1,155.07	-20.26%	0.96	-19.47%	-0.99%
290	R W Investment Management	Eagle, Idaho	1,154.85	-14.84%	1.47	-8.54%	-6.89%
291	BigSur Wealth Management	Miami, Fla.	1,154.40	0.09%	54.97	-9.44%	10.53%
292	Traphagen Investment Advisors	Oradell, N.J.	1,151.99	-0.79%	0.67	-11.46%	12.05%
293	TrinityPoint Wealth	Milford, Conn.	1,149.03	10.84%	1.14	-15.13%	30.61%
294	Valley National Adviser	Bethlehem, Pa.	1,129.29	-9.99%	0.50	-10.36%	0.40%
295	Madison Wealth Management	Cincinnati, Ohio	1,123.86	-13.13%	1.95	-19.02%	7.26%
296	The Weil Company dba Christopher Weil & Co.	San Diego, Calif.	1,107.18	4.23%	2.04	-0.58%	4.84%
297	Telos Capital Management	San Diego, Calif.	1,101.82	-7.98%	1.42	-9.76%	1.97%
298	Financial Synergies Wealth Advisors	Houston, Texas	1,091.13	-1.93%	1.40	-7.20%	5.68%
299	Wealthstream Advisors	New York City, N.Y.	1,075.08	-7.08%	2.65	-10.98%	4.38%

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-'22 and % Growth In Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.  
 For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AAronDeyang@FAMag@wrightsmedia.com).

# FA's 2023 RIA RANKING



2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
300	Titleist Asset Management	San Antonio, Texas	1,072.64	1.27%	0.81	-4.30%	5.82%
301	Blue Chip Partners	Farmington Hills, Mich.	1,052.01	-4.26%	1.57	5.30%	-9.08%
302	Sheaff Brock Investment Advisors	Indianapolis, Ind.	1,049.68	-25.61%	1.16	-24.87%	-0.98%
303	Nilsine Partners	Greenwood Village, Colo.	1,048.57	3.89%	2.39	-15.08%	22.35%
304	PDS Planning	Dublin, Ohio	1,045.59	-7.57%	1.76	-8.34%	0.85%
305	Weatherly Asset Management	Del Mar, Calif.	1,013.76	-16.83%	2.78	-15.23%	-1.88%
306	Palisade Asset Management	Minneapolis, Minn.	1,012.21	402.21%	3.85	388.85%	2.73%
307	Paragon Capital Management	Denver, Colo.	1,002.80	-29.53%	6.43	-29.08%	-0.64%
308	StraightLine Group	Troy, Mich.	1,002.56	-14.98%	0.38	-14.85%	-0.15%
309	SPC Financial	Rockville, Md.	1,000.15	-12.66%	0.75	-20.00%	9.17%
<b>ASSET CATEGORY: \$500 MILLION TO &lt; \$1 BILLION</b>							
310	Delta Financial Group	Basking Ridge, N.J.	996.31	-7.43%	1.34	-12.27%	5.52%
311	Destiny Wealth Partners	Tavares, Fla.	986.97	-4.29%	1.04	-9.81%	6.13%
312	Wedmont Private Capital	West Chester, Pa.	984.07	96.29%	4.58	18.69%	65.38%
313	BFSG	Irvine, Calif.	976.97	-11.56%	1.24	-16.49%	5.91%
314	Agili	Richmond, Va.	972.54	-8.81%	2.79	-15.87%	8.39%
315	CJM Wealth Advisers	Falls Church, Va.	970.25	-12.21%	1.14	-16.23%	4.80%
316	Virtue Capital Management	Brentwood, Tenn.	941.39	-12.14%	0.12	-25.68%	18.21%
317	Janiczek Wealth Management	Denver, Colo.	940.87	-4.50%	5.53	-10.12%	6.25%
318	Cadinha & Co.	Honolulu, Hawaii	939.35	-10.78%	1.36	-11.43%	0.73%
319	Regatta Capital Group	El Segundo, Calif.	931.43	2.71%	0.93	-4.90%	8.00%
320	Retirement Investment Advisors	Oklahoma City, Okla.	929.85	-17.82%	0.70	-22.85%	6.52%
321	Petersen Hastings Investment Management	Kennewick, Wash.	927.09	-8.36%	0.99	-14.26%	6.87%
322	Delegate Advisors	Chapel Hill, N.C.	902.44	-4.68%	20.99	-13.54%	10.26%
323	Moisand Fitzgerald Tamayo	Orlando, Fla.	901.42	-2.23%	1.13	-10.57%	9.33%
324	NEIRG Wealth Management	North Andover, Mass.	899.33	-12.48%	1.10	-10.24%	-2.50%
325	REDW Wealth	Albuquerque, N.M.	896.40	-6.15%	2.33	5.83%	-11.32%
326	Willis Johnson & Associates	Houston, Texas	894.23	-2.26%	2.17	-11.75%	10.75%
327	Total Wealth Planning	Blue Ash, Ohio	865.82	6.14%	1.55	-14.02%	23.45%
328	MJP Wealth Advisors	Farmington, Conn.	864.38	-10.64%	1.12	-19.63%	11.19%
329	Apriem Advisors	Irvine, Calif.	862.06	-14.47%	1.15	-18.35%	4.75%
330	DiNuzzo Private Wealth	Beaver, Pa.	842.11	-9.40%	1.03	-8.85%	-0.61%
331	Signet Financial Management	Parsippany, N.J.	839.65	-12.49%	1.16	-15.99%	4.17%
332	Halpern Financial †††	Ashburn, Va.	828.83	-3.98%	2.72	-7.45%	3.74%
333	Austin Private Wealth	Austin, Texas	823.11	-3.58%	0.72	-15.25%	13.78%
334	Spectrum Wealth Management	Indianapolis, Ind.	810.00	-17.10%	3.51	-17.10%	0.00%
335	Evermay Wealth Management	Arlington, Va.	799.52	8.51%	1.91	-8.10%	18.08%
336	Lake Street	Chicago, Ill.	796.37	-9.58%	1.47	-12.09%	2.85%
337	Financial Advisory Corporation	Grand Rapids, Mich.	795.72	-6.86%	3.39	-13.20%	7.31%
338	Seasons of Advice Wealth Management	New York, N.Y.	789.28	-16.40%	1.02	-18.67%	2.79%
339	Abound Wealth Management	Franklin, Tenn.	787.15	-0.54%	1.38	-24.48%	31.71%
340	WPWealth	Fort Worth, Texas	779.27	-14.79%	1.93	-18.59%	4.66%
341	Stage Harbor Financial	Needham, Mass.	775.23	-7.03%	2.54	-13.13%	7.02%
342	HCM Wealth Advisors	Cincinnati, Ohio	771.84	-9.85%	1.09	-11.51%	1.87%
343	Glass Jacobson Wealth Advisors	Owings Mills, Md.	770.08	10.97%	1.05	-17.27%	34.12%
344	Yeske Buie	San Francisco, Calif.	767.66	-9.94%	2.89	-11.63%	1.92%
345	Rappaport Reiches Capital Management	Skokie, Ill.	765.00	2.68%	1.96	-14.43%	20.00%
346	Southern Financial Group	Birmingham, Ala.	741.14	-11.49%	0.60	-12.27%	0.90%
347	WorthPointe	San Diego, Calif.	733.35	-10.24%	1.29	-12.77%	2.90%
348	Fermata Advisors	Sonoma, Calif.	733.00	47.78%	0.92	-26.11%	100.00%

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-'22 and % Growth In Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.  
 For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AAaronDeyang@FAMag@wrightsmedia.com).

# FA's 2023 RIA RANKING



2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
349	The Advisory Group of San Francisco	San Francisco, Calif.	730.00	-31.24%	4.53	-31.67%	0.63%
350	Socius Family Office	Fort Lauderdale, Fla.	728.19	-0.75%	4.52	-4.45%	3.87%
351	Omnia Family Wealth	Aventura, Fla.	722.10	6.52%	9.50	5.12%	1.33%
352	Aufman Associates	Sewickley, Pa.	716.06	-18.23%	2.98	-17.21%	-1.23%
353	Ullmann Wealth Partners	Jacksonville Beach, Fla.	706.79	-7.64%	1.72	-18.00%	12.64%
354	Concentus Wealth Advisors	Newtown Square, Pa.	700.00	7.50%	2.46	3.73%	3.64%
355	Souders Financial Advisors	Cincinnati, Ohio	697.06	27.82%	0.77	27.82%	0.00%
356	Chemistry Wealth Management	New York, N.Y.	693.23	-3.04%	1.41	-10.51%	8.35%
357	Blankinship & Foster	Solana Beach, Calif.	690.04	-12.26%	2.27	-13.13%	1.00%
358	Rainey & Randall Investment Management	Celebration, Fla.	677.11	-8.78%	2.06	-16.54%	9.30%
359	The Arkansas Financial Group	Little Rock, Ark.	668.25	-10.14%	1.99	-15.49%	6.33%
360	Briaud Financial Advisors	College Station, Texas	664.29	-2.78%	2.06	-8.20%	5.90%
361	Leisure Capital Management	Costa Mesa, Calif.	664.27	1.40%	2.16	-1.56%	3.01%
362	CapSouth Wealth Management	Dothan, Ala.	661.01	-12.93%	1.50	-15.49%	3.03%
363	Fi3 Financial Advisors	Indianapolis, Ind.	657.21	8.42%	3.59	20.26%	-9.85%
364	Next Level Private	Harrison, N.Y.	656.22	-85.91%	1.64	-88.44%	21.95%
365	Financial Enhancement Group	Anderson, Ind.	650.00	0.00%	0.58	-4.26%	4.44%
366	Chequers Financial Management	San Francisco, Calif.	642.94	8.88%	3.67	-12.89%	25.00%
367	Tobias Financial Advisors	Plantation, Fla.	641.00	-1.38%	2.05	-7.69%	6.83%
368	Porter White Investment Advisors	Birmingham, Ala.	640.66	1.22%	5.48	-1.37%	2.63%
369	StrategicPoint Investment Advisors	Providence, R.I.	637.57	-15.19%	0.94	-16.07%	1.04%
370	PJS Investment Management	Cedarburg, Wis.	637.53	-16.61%	1.42	-17.91%	1.58%
371	Element Pointe Family Office	Miami, Fla.	636.74	11.40%	16.76	23.13%	-9.52%
372	Opal Wealth Advisors	Jericho, N.Y.	633.10	-6.09%	1.02	-15.82%	11.55%
373	Duncan Williams Asset Management	Memphis, Tenn.	632.03	26.10%	1.08	10.39%	14.23%
374	Great Lakes Retirement	Sheffield Village, Ohio	624.94	-9.63%	0.36	-11.84%	2.51%
375	Investmark Advisory Group	Shelton, Conn.	623.17	-4.64%	0.97	-13.81%	10.63%
376	Financial Insights Wealth Management	Tacoma, Wash.	621.06	16.38%	0.70	-2.01%	18.77%
377	Mirador Capital Partners	Pleasanton, Calif.	620.00	-1.90%	1.03	-10.07%	9.09%
378	Shorepoint Capital Partners	Norwood, Mass.	618.34	31.29%	1.62	-5.83%	39.42%
379	BlueSky Wealth Advisors	New Bern, N.C.	612.43	-2.51%	1.74	-4.45%	2.03%
380	KMH Wealth Management	Victoria, Texas	607.04	-6.72%	1.21	-5.23%	-1.57%
381	Fairhaven Wealth Management	Wheaton, Ill.	606.68	-15.62%	1.22	-21.57%	7.59%
382	The L. Warner Companies	Timonium, Md.	605.99	-11.14%	1.97	-7.10%	-4.35%
383	Droms Strauss Wealth Management	Saint Louis, Mo.	592.63	-13.73%	1.50	-20.08%	7.95%
384	Asset Management Group	Stamford, Conn.	590.75	-16.11%	2.26	-15.46%	-0.76%
385	Spectrum Investment Advisors	Mequon, Wis.	590.28	-11.57%	1.52	-17.71%	7.46%
386	Frazier Financial Advisors	Columbus, Ohio	590.00	-4.07%	1.24	-12.14%	9.20%
387	Klaas Financial Asset Advisors	Loves Park, Ill.	587.38	-12.98%	0.55	-11.93%	-1.19%
388	Diesslin Group	Fort Worth, Texas	583.40	-20.10%	2.00	-15.72%	-5.19%
389	High Net Worth Advisory Group	Naples, Fla.	579.04	43.56%	1.54	-4.30%	50.00%
390	McIlrath & Eck	Arlington, Wash.	566.20	-12.27%	0.62	-16.03%	4.47%
391	Summit Wealth Partners	Orlando, Fla.	565.72	-12.82%	0.68	-16.69%	4.65%
392	Greystone Financial Group	Bloomfield Hills, Mich.	564.91	-8.44%	0.81	-17.06%	10.39%
393	Elwood & Goetz Wealth Advisory Group	Athens, Ga.	564.49	1.08%	1.01	-9.97%	12.27%
394	Meritas Wealth Management	Larkspur, Calif.	560.57	23.32%	2.29	21.81%	1.24%
395	Optas Capital	Austin, Texas	548.23	-15.34%	3.94	-23.25%	10.32%
396	Catalyst Financial Partners	Boston, Mass.	547.29	195.33%	3.94	-12.89%	239.02%
397	Excalibur Management Corp.	Newton, Mass.	540.96	-5.42%	1.76	-10.34%	5.48%
398	Rowling & Associates	San Diego, Calif.	529.98	-13.90%	1.46	-17.69%	4.61%

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-'22 and % Growth In Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.  
 For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

# FA's 2023 RIA RANKING

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
399	Falcon Wealth Planning †††	Ontario, Calif.	528.14	15.70%	0.53	-12.64%	32.45%
400	Marotta Wealth Management	Charlottesville, Va.	524.76	-7.87%	1.29	0.51%	-8.33%
401	Net Worth Advisory Group	Sandy, Utah	524.43	-9.84%	0.74	-16.08%	7.44%
402	Financial Management Strategies	Broadview Hts., Ohio	522.31	-14.10%	0.32	-20.11%	7.52%
403	Level Financial Advisors	Amherst, N.Y.	519.65	-4.69%	NA	NA	NA
404	Carolina Wealth Management	Greenville, N.C.	515.88	-12.18%	0.99	-21.27%	11.54%
405	Grand Wealth Management	Grand Rapids, Mich.	509.77	-12.46%	2.74	-20.46%	10.06%
406	J.W. Coons Advisors	Columbus, Ohio	502.57	-2.33%	3.26	-8.04%	6.21%
<b>ASSET CATEGORY: \$250 MILLION TO &lt;\$500 MILLION</b>							
407	Arista Wealth Management	Las Vegas, Nev.	496.55	-9.73%	1.46	-17.72%	9.71%
408	NorthCape Wealth Management	Williamsville, N.Y.	492.81	-4.93%	0.78	-9.31%	4.83%
409	Sikich Financial	Springfield, Ill.	486.38	-3.53%	0.59	-11.88%	9.48%
410	Hopwood Financial Services	Reston, Va.	486.26	-8.56%	1.88	-3.60%	-5.15%
411	Jentner Wealth Management	Akron, Ohio	481.07	-9.16%	1.55	-10.63%	1.64%
412	Bridge Advisory	Pasadena, Calif.	459.17	-9.09%	0.85	-11.10%	2.26%
413	Financial Alternatives	La Jolla, Calif.	458.98	0.10%	1.78	-1.07%	1.18%
414	Gradient Capital Advisors	San Diego, Calif.	457.14	-10.83%	1.06	-11.66%	0.94%
415	Vance Wealth	Santa Clarita, Calif.	448.75	-11.32%	1.47	-14.81%	4.10%
416	Wilsey Asset Management	San Diego, Calif.	445.97	0.46%	0.56	-10.31%	12.01%
417	Clune & Associates	Chicago, Ill.	433.70	-1.09%	2.15	-5.99%	5.21%
418	JVL Wealth Strategies	Wyoming, Mich.	431.74	-2.17%	3.22	-16.04%	16.52%
419	Manske Wealth Management	Houston, Texas	426.44	7.73%	1.05	-0.78%	8.58%
420	WJ Interests	Sugar Land, Texas	426.00	-6.37%	1.99	-9.00%	2.88%
421	Ballast	Lexington, Ky.	423.41	-8.55%	1.10	-12.84%	4.92%
422	Pinnacle Financial Group	Western Springs, Ill.	421.53	-8.13%	1.23	-10.80%	2.99%
423	Rose Capital Advisors	Miami Beach, Fla.	409.59	13.69%	1.39	-28.46%	58.92%
424	Trinity Financial Advisors	Columbus, Ohio	399.15	10.70%	2.85	-1.16%	12.00%
425	ARQ Wealth Advisors	Scottsdale, Ariz.	397.00	-3.64%	1.27	-12.57%	10.21%
426	Asio Capital	Lexington, Ky.	395.39	-2.44%	1.76	-11.11%	9.76%
427	Asset Planning	Cypress, Calif.	394.38	-11.48%	1.02	-15.60%	4.88%
428	Transitions Wealth Management	Denver, Colo.	391.58	-7.52%	1.00	-10.59%	3.44%
429	Andrews, Lucia Wealth Management	Danville, Calif.	387.62	-3.81%	2.00	-8.28%	4.86%
430	QP Consulting	Takoma Park, Md.	374.78	-11.30%	5.59	-20.56%	11.67%
431	Fiduciary Wealth Management	Reston, Va.	369.46	-12.14%	0.93	-16.12%	4.74%
432	Sandbox Financial Partners	Bethesda, Md.	364.46	-4.23%	0.92	-17.25%	15.74%
433	ShoreHaven Wealth Partners	Red Bank, N.J.	361.43	-5.16%	1.12	-11.01%	6.58%
434	Alpha Financial Advisors	Charlotte, N.C.	353.65	-13.88%	1.48	-15.68%	2.14%
435	Kercheville Advisors	San Antonio, Texas	347.71	5.98%	0.89	9.50%	-3.22%
436	Reston Wealth Management	Reston, W.Va.	345.96	-15.62%	0.74	-17.07%	1.75%
437	Allodium Investment Consultants	Minneapolis, Minn.	342.72	-8.52%	1.44	-14.67%	7.21%
438	Poehling Capital Management	Madison, Wis.	338.09	-10.29%	0.85	-17.69%	8.99%
439	Searcy Financial Services	Overland Park, Kan.	334.44	-8.19%	2.14	13.58%	-19.17%
440	Winch Financial	Appleton, Wis.	333.93	-22.93%	0.39	-28.91%	8.41%
441	StrongBox Wealth	Lee's Summit, Mo.	333.86	-8.67%	0.83	-22.33%	17.60%
442	McCarthy Asset Management	Redwood Shores, Calif.	326.14	-12.80%	1.49	-10.81%	-2.23%
443	Jackson Square Capital	San Francisco, Calif.	316.41	-19.84%	2.96	NA	NA
444	Branson, Fowlkes & Company	Houston, Texas	308.79	-10.48%	1.73	NA	NA
445	Baron Financial Group	Fair Lawn, N.J.	300.65	-13.37%	0.93	-14.44%	1.26%
446	WealthCrest Financial Services	Springfield, Va.	295.29	-3.42%	0.75	-15.22%	13.91%
447	Oliver Capital Management	Seattle, Wash.	289.16	-9.64%	0.58	-18.67%	11.11%

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-'22 and % Growth In Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.  
 For reprints of this PDF please contact Aaron Deyang at [FAmag@wrightsmedia.com](mailto:FAmag@wrightsmedia.com).



# FA's 2023 RIA RANKING

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
448	R.W. Rogé & Company	Bohemia, N.Y.	288.00	-16.03%	0.98	-20.05%	5.02%
449	Harbor Financial Grp. dba Harbor Wealth Mgmt.	Boulder, Colo.	283.08	-17.03%	1.48	-20.07%	3.80%
450	Camarda Wealth Advisory Group	Fleming Island, Fla.	282.19	7.09%	0.71	11.41%	-3.88%
451	Sard Wealth Management Group	Atlanta, Ga.	278.84	-8.77%	1.01	-8.77%	0.00%
452	Centerline Wealth Advisors	Louisville, Ky.	275.00	12.24%	1.00	2.04%	10.00%
453	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	274.76	-7.04%	0.71	-17.87%	13.20%
454	Fidato Wealth	Middleburg Heights, Ohio	270.69	-13.00%	1.09	-3.91%	-9.45%
455	Legacy Consulting Group	Plano, Texas	269.23	-17.19%	1.82	-15.51%	-1.99%
456	Fortune Wealth Management	Dallas, Texas	264.57	-11.81%	1.26	-10.13%	-1.87%
457	Merkle Retirement Planning	Grimes, Iowa	262.51	12.08%	0.38	-3.78%	16.47%
458	Sebold Capital Management	Lisle, Ill.	258.71	-15.45%	2.51	-15.45%	0.00%
459	Etesian Wealth Advisors	West Linn, Ore.	258.41	-10.12%	1.46	-26.37%	22.07%
460	Portfolio Wealth Advisors	Albuquerque, N.M.	254.25	-10.79%	0.98	-12.50%	1.96%
461	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	251.24	-16.96%	1.51	-21.96%	6.41%
462	Ted Buchan & Company	San Diego, Calif.	251.00	-7.79%	1.25	-19.26%	14.20%
463	Pearson Creek Capital Management	Chicago, Ill.	250.00	-2.72%	12.50	-2.72%	0.00%
<b>ASSET CATEGORY: \$150 MILLION TO &lt;\$250 MILLION</b>							
464	Family Wealth Advisory Group	Cincinnati, Ohio	232.27	-12.66%	1.21	-16.30%	4.35%
465	Life Planning Partners	Jacksonville, Fla.	232.07	-9.45%	2.44	-9.45%	0.00%
466	Empyrium Wealth Management	Roseville, Calif.	230.80	-6.18%	2.48	-12.23%	6.90%
467	Veripax Wealth Management	Folsom, Calif.	230.48	4.15%	0.84	-1.13%	5.34%
468	Vaughan & Co. Securities	Ridgewood, N.J.	226.00	-16.30%	1.92	-21.97%	7.27%
469	Sharper & Granite	El Segundo, Calif.	224.43	-2.33%	2.18	-4.22%	1.98%
470	O'Keefe Stevens Advisory	Rochester, N.Y.	215.82	-17.60%	1.31	-10.11%	-8.33%
471	FSA Advisors	Warren, Mich.	214.40	8.42%	0.15	-30.48%	55.95%
472	Foresight Capital Management Advisors	Saline, Mich.	212.43	-10.46%	0.43	-17.65%	8.73%
473	Integrated Capital Management	Bloomfield Hills, Mich.	211.17	-6.92%	0.55	-12.97%	6.94%
474	Canter Wealth	San Diego, Calif.	203.47	-3.22%	0.85	-22.25%	24.48%
475	Kemp Financial Management	Fullerton, Calif.	202.72	-8.06%	1.23	-13.07%	5.77%
476	Private Capital Management	Larkspur, Calif.	200.45	-3.79%	3.40	-10.31%	7.27%
477	Cathy Pareto And Associates	Coral Gables, Fla.	197.36	13.47%	NA	NA	NA
478	Fortitude Family Office	Scottsdale, Ariz.	196.35	NA	4.79	NA	NA
479	Kotys Wealth Professionals	Valparaiso, Ind.	189.00	4.13%	0.69	2.60%	1.49%
480	Charleston Financial Advisors	Charleston, S.C.	185.92	-14.15%	1.03	2.54%	-16.28%
481	Granite Financial Group	Brookfield, Wis.	185.10	NA	0.64	NA	-3.33%
482	TABR Capital Management	Orange, Calif.	182.29	1.29%	0.76	-4.17%	5.70%
483	Byrne Asset Management	Kingston, N.J.	180.66	-10.00%	1.32	-11.31%	1.48%
484	Professional Financial Strategies	Pittsford, N.Y.	178.92	-12.12%	1.66	-12.93%	0.93%
485	Center For Asset Management	Palm Beach Gardens, Fla.	174.44	-7.86%	0.85	-1.57%	-6.39%
486	AlbanyAdvisor Group	Albany, N.Y.	172.69	NA	0.67	NA	NA
487	Integras Partners	Alpharetta, Ga.	172.00	-4.44%	1.00	-5.56%	1.18%
488	Longview Financial Advisors	Huntsville, Ala.	171.15	-10.95%	0.82	-16.92%	7.18%
489	RHS Financial	San Francisco, Calif.	165.33	-10.79%	1.14	-4.02%	-7.05%
490	Beacon Financial Advisors	Rye Brook, N.Y.	160.89	-12.25%	3.09	-12.25%	0.00%
491	Westview Investment Advisors	Burlington, Vt.	157.37	-12.94%	1.09	-15.94%	3.57%
492	Purtill Financial	Highland Heights, Ohio	157.36	-13.77%	0.90	-10.80%	-3.33%
493	Gold Medal Waters	Boulder, Colo.	154.95	-8.03%	1.13	-6.02%	-2.14%
<b>ASSET CATEGORY: \$50 MILLION TO &lt;\$150 MILLION</b>							
494	Smith Bruer Advisors	Tallahassee, Fla.	146.53	-7.61%	0.60	-9.11%	1.65%
495	Flagship Capital Management	Media, Pa.	145.00	-2.03%	1.02	-4.79%	2.90%

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth in Assets 2021-'22 and % Growth in Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.  
 For reprints of this PDF please contact [Aaron Deyang at FAMag@wrightsmedia.com](mailto:AaronDeyang@FAMag@wrightsmedia.com).

# FA's 2023 RIA RANKING

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2022 ASSETS (\$MM)	% GROWTH IN ASSETS 2021-2022	ASSETS PER CLIENT (\$MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
496	Alpha Wealth Strategies	Cypress, Texas	143.18	-14.10%	4.47	-16.79%	3.23%
497	Elderado Financial	Montrose, Colo.	142.04	0.00%	0.39	-11.20%	12.62%
498	CrossGrain Family Investments	Henrico, Va.	141.96	3.05%	1.92	-2.52%	5.71%
499	Paragon Wealth Management	Provo, Utah	136.58	-8.59%	0.87	-13.83%	6.08%
500	Ivy League Financial Advisors	Rockville, Md.	115.05	-14.45%	1.21	-14.45%	0.00%
501	Steward Advisors	Chicago, Ill.	114.95	-3.18%	1.16	-3.18%	0.00%
502	S.P. Parkin & Co.	Chesterfield, Mo.	107.80	-1.10%	1.52	-10.85%	10.94%
503	Shapiro Financial Security Group	Hazlet, N.J.	105.17	-17.10%	0.83	-17.76%	0.79%
504	Strada Management	West Lake Hills, Texas	100.00	42.86%	1.67	-4.76%	50.00%
505	MTR Financial Services	Kingwood, Texas	80.72	36.34%	0.84	13.62%	20.00%
506	Brighton Financial Planning	Flemington, N.J.	76.49	-14.75%	0.83	-14.75%	0.00%
507	Chilmark Financial Advisors	Miami, Fla.	75.24	-15.86%	1.39	-14.30%	-1.82%
508	Meritas Advisors	San Rafael, Calif.	72.23	-7.21%	1.44	3.92%	-10.71%
509	Graf Financial	Baton Rouge, La.	71.87	-5.70%	1.03	-5.70%	0.00%
510	Sherwood Investments	Redmond, Wash.	70.00	0.00%	1.40	NA	NA
511	Oak Street Advisors	Myrtle Beach, S.C.	69.96	-1.58%	0.53	-8.29%	7.32%
512	Walnut Investment Services	Brooklyn, N.Y.	61.00	-8.96%	0.58	-10.69%	1.94%
513	Holbrook Management	Dallas, Texas	60.51	0.00%	1.03	-16.95%	20.41%
514	Ankerstar Wealth	Round Rock, Texas	52.28	6.06%	0.33	-8.80%	16.30%
515	Shriver Investments	Parker, Colo.	40.71	-21.07%	0.56	-17.83%	-3.95%
516	The Leonard Financial Group	Riverside, Calif.	34.49	-19.80%	0.51	-41.03%	36.00%
517	Safe Harbor Asset Management	Huntington, N.Y.	34.33	-20.72%	0.37	-23.28%	3.33%
518	Birch Investment Management	Brookings, S.D.	18.22	4.99%	0.32	6.83%	-1.72%
519	Venn Wealth & Benefit Services	Altoona, Pa.	17.19	4.42%	0.20	-25.58%	40.32%
520	Aurora Strategic Advisors	Lumberton, N.C.	15.50	29.17%	0.07	43.39%	-9.92%
521	Atherean Wealth Management	Jersey City, N.J.	6.95	-13.93%	0.26	-10.74%	-3.57%

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth in Assets 2021-'22 and % Growth in Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

*This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.*  
 For reprints of this PDF please contact **Aaron Deyang** at **FAmag@wrightsmedia.com**.

# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)
<b>ASSET CATEGORY: \$1 BILLION AND OVER</b>					
1	CAPTRUST	Raleigh, N.C.	126,201.97	651,095.77	777,297.74
2	Edelman Financial Engines	Boston, Mass.	241,970.18	0.00	241,970.18
3	SageView Advisory Group	Newport Beach, Calif.	13,985.36	142,414.06	156,399.42
4	Hightower Advisors	Chicago, Ill.	104,306.13	924.08	105,230.21
5	Fort Washington Investment Advisors	Cincinnati, Ohio	70,711.25	326.56	71,037.80
6	CIBC Private Wealth Advisors	Atlanta, Ga.	64,662.64	5,086.59	47,518.25
7	Mariner Wealth Advisors	Overland Park, Kan.	53,006.92	12,867.65	65,874.57
8	Wealth Enhancement Advisory Services	Plymouth, Minn.	50,048.47	6,344.25	56,392.71
9	Cerity Partner	New York, N.Y.	36,934.48	3,499.09	40,433.57
10	Fiducient Advisors	Chicago, Ill.	16,528.01	23,492.76	40,020.77
11	Kayne Anderson Rudnick Investment Mgmt.	Los Angeles, Calif.	33,531.27	0.00	33,531.27
12	Moneta	St. Louis, Mo.	18,845.31	11,806.07	30,651.38
13	Silvercrest Asset Management Group	New York, N.Y.	20,851.02	8,053.97	28,904.99
14	Evoke Advisors*	Los Angeles, Calif.	10,201.07	14,739.00	24,940.07
15	Pathstone	Englewood, N.J.	16,475.91	8,359.95	24,835.86
16	Advanced Capital Group	Minneapolis, Minn.	835.12	23,865.37	24,700.48
17	Cresset Asset Management	Chicago, Ill.	22,774.09	1,837.83	24,611.93
18	BBR Partners	New York, N.Y.	21,908.60	2,173.00	24,081.60
19	Beacon Pointe Advisors	Newport Beach, Calif.	21,165.29	2,080.44	23,245.73
20	Segall Bryant & Hamill	Chicago, Ill.	22,188.52	50.55	22,239.08
21	Buckingham Strategic Wealth	Saint Louis, Miss.	20,520.99	1,558.60	22,079.59
22	Carson Wealth	Omaha, Neb.	19,921.67	21.89	19,943.56
23	AE Wealth Management	Topeka, Kan.	19,248.84	0.00	19,248.84
24	The Colony Group	Boston, Mass.	16,362.19	2,467.02	18,829.21
25	Wealthspire Advisors	New York, N.Y.	18,454.61	317.49	18,772.10
26	1919 Investment Counsel	New York, N.Y.	17,256.47	122.52	17,378.99
27	Bahl & Gaynor	Cincinnati, Ohio	16,764.56	337.97	17,102.53
28	Plante Moran Financial Advisors	Southfield, Mich.	7,645.22	9,097.30	16,742.52
29	Johnson Investment Counsel	Cincinnati, Ohio	16,129.98	183.93	16,313.91
30	MAI Capital Management	Cleveland, Ohio	14,219.03	1,554.40	15,773.43
31	Oxford Financial Group	Carmel, Ind.	6,537.29	9,050.62	15,587.91
32	Allworth Financial	Folsom, Calif.	14,367.45	513.37	14,880.81
33	Newport Capital Group	Red Bank, N.J.	246.08	14,419.91	14,665.99
34	Savant Wealth Management†††	Rockford, Ill.	13,400.00	0.00	13,400.00
35	Lido Advisors	Los Angeles, Calif.	12,642.50	459.56	13,102.07
36	Aspiriant	Los Angeles, Calif.	10,376.39	2,593.08	12,969.47
37	Homrich Berg	Atlanta, Ga.	10,832.64	1,695.67	12,528.31
38	Choreo	Minneapolis, Minn.	12,065.55	124.56	12,190.11
39	Appleton Partners	Boston, Mass.	12,139.35	0.00	12,139.35
40	WE Family Offices	Miami, Fla.	0.00	12,056.43	12,056.43
41	myCIO Wealth Partners	Philadelphia, Pa.	478.74	11,528.64	12,007.38
42	Signature Estate & Investment Advisors	Los Angeles, Calif.	1,026.43	10,639.47	11,665.90
43	Evercore Wealth Management	New York, N.Y.	10,467.07	70.05	10,537.12
44	Clearstead Advisors	Cleveland, Ohio	6,789.15	3,438.69	10,227.85
45	Mason Investment Advisory Services	Reston, Va.	9,839.17	255.31	10,094.48
46	CliftonLarsonAllen Wealth Advisors	Minneapolis, Minn.	4,988.58	5,101.42	10,090.00
47	Gresham Partners	Chicago, Ill.	6,546.16	2,980.98	9,527.15
48	Brighton Jones	Seattle, Wash.	9,374.98	83.40	9,458.38
49	Williams Jones Wealth Management	New York, N.Y.	9,241.43	83.64	9,325.07

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-22 and % Growth In Assets Per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

*This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.*  
For reprints of this PDF please contact **Aaron Deyang** at **FAmag@wrightsmedia.com**.

# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)
50	IRA Group	Atlanta, Ga.	568.62	8,506.42	9,075.04
51	GW & Wade	Wellesley, Mass.	8,891.94	10.78	8,902.73
52	The Mather Group	Chicago, Ill.	7,831.54	887.17	8,718.72
53	CV Advisors	Aventura, Fla.	529.10	7,886.28	8,415.39
54	Freestone Capital Management	Seattle, Wash.	6,104.44	2,116.63	8,221.07
55	TAG Associates	New York, N.Y.	309.80	7,761.69	8,071.49
56	Anchor Capital Advisors	Boston, Mass.	2,691.77	5,316.28	8,008.06
57	Mill Creek Capital Advisors	Conshohocken, Pa.	566.20	73.06	7,876.36
58	Johnson Wealth	Racine, Wis.	6,188.42	1,557.82	7,746.24
59	Tolleson Wealth Management	Dallas, Texas	7,425.00	168.00	7,593.00
60	Brookstone Capital Management	Wheaton, Ill.	7,514.38	0.00	7,514.38
61	Kovitz Investment Group Partners	Chicago, Ill.	7,293.64	0.00	7,293.64
62	Clarfeld Financial Advisors	Tarrytown, N.Y.	4,638.42	2,467.20	7,105.62
63	Valeo Financial Services	Carmel, Ind.	5,491.50	1,612.21	7,103.71
64	Douglas C. Lane & Associates	New York, N.Y.	7,045.88	0.00	7,045.88
65	Forum Financial Management	Lombard, Ill.	6,922.89	82.67	7,005.56
66	Conrad Siegel Investment Advisors	Harrisburg, Pa.	2,303.66	4,683.99	6,987.64
67	Bartlett Wealth Management	Cincinnati, Ohio	6,911.17	37.70	6,948.87
68	Welch & Forbes	Boston, Mass.	6,615.24	195.59	6,810.84
69	Modera Wealth Management	Westwood, N.J.	6,755.11	45.69	6,800.79
70	Connectus Wealth Advisers	Hunt Valley, Md.	6,677.52	96.27	6,773.79
71	Cornerstone Advisors Asset Management	Bethlehem, Pa.	3,289.02	3,348.56	6,637.58
72	Circle Wealth Management	Summit, N.J.	1,469.04	5,082.13	6,551.18
73	Wetherby Asset Management	San Francisco, Calif.	6,253.00	278.46	6,531.45
74	Coldstream Wealth Management	Bellevue, Wash.	6,284.25	214.00	6,498.24
75	Ropes Wealth Advisors	Marblehead, Mass.	6,249.92	248.29	6,498.20
76	Adviser Investments	Newton, Mass.	6,450.00	0.16	6,450.16
77	RMB Capital	Chicago, Ill.	6,076.56	294.33	6,370.89
78	SignatureFD	Atlanta, Ga.	5,570.10	576.67	6,146.77
79	Altair Advisors	Chicago, Ill.	2,380.04	3,634.15	6,014.19
80	Greenspring Advisors	Towson, Md.	2,352.47	3,647.64	6,000.12
81	Caprock	Boise, Idaho	5,701.52	218.33	5,919.85
82	Joel Isaacson & Co.	New York, N.Y.	3,519.34	2,392.00	5,911.34
83	Parallel Advisors	San Francisco, Calif.	5,705.59	2.54	5,708.13
84	Bradley, Foster & Sargent	Hartford, Conn.	5,626.00	3.52	5,629.52
85	Heck Capital Advisors	Rhineland, Wis.	1,363.58	4,256.75	5,620.33
86	Advisors Capital Management	Ridgewood, N.J.	5,601.71	0.00	5,601.71
87	Plancorp	St. Louis, Mo.	5,268.47	276.95	5,545.42
88	Waverly Advisors	Birmingham, Ala.	5,178.99	331.90	5,510.88
89	WMS Partners	Towson, Md.	3,225.00	1,930.00	5,155.00
90	Simon Quick Advisors	Morristown, N.J.	4,538.51	565.47	5,103.98
91	Bailard	Foster City, Calif.	5,065.83	17.55	5,083.39
92	Thrivent Advisor Network	Minneapolis, Minn.	4,963.10	95.33	5,058.43
93	HBKS Wealth Advisors	Erie, Pa.	4,901.86	89.89	4,991.76
94	First Foundation Advisors	Irvine, Calif.	4,894.67	90.61	4,985.28
95	Mission Wealth Management	Santa Barbara, Calif.	4,154.81	820.75	4,975.56
96	Beacon Capital Management	Dayton, Ohio	4,890.17	32.13	4,922.30
97	Perigon Wealth Management	San Francisco, Calif.	4,043.96	786.41	4,830.37
98	Ingalls & Snyder	New York, N.Y.	4,623.10	134.39	4,757.49
99	Wilbanks, Smith & Thomas Asset Management	Norfolk, Va.	4,716.73	37.80	4,754.54

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-22 and % Growth In Assets Per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

*This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.*  
For reprints of this PDF please contact **Aaron Deyang** at [FAmag@wrightsmedia.com](mailto:FAmag@wrightsmedia.com).



# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)
100	Alesco Advisors	Pittford, N.Y.	4,028.13	672.77	4,700.91
101	GYL Financial Synergies	West Hartford, Conn.	3,062.47	1,584.48	4,646.95
102	Northside Capital Management	Hood River, Ore.	2,551.34	2,084.35	4,635.69
103	Sendero Wealth Management	San Antonio, Texas	847.19	3,668.80	4,515.99
104	JMG Financial Group	Downers Grove, Ill.	4,315.00	186.00	4,501.00
105	Zhang Financial	Portage, Mich.	2,705.83	1,758.63	4,464.46
106	Shuster Advisory Group	Pasadena, Calif.	4,313.47	69.64	4,383.11
107	Pure Financial Advisors	San Diego, Calif.	4,303.03	58.70	4,361.73
108	Index Fund Advisors	Irvine, Calif.	4,353.56	0.00	4,353.56
109	Klingenstein Fields Advisors	New York, N.Y.	3,563.82	750.46	4,314.28
110	Fort Pitt Capital Group	Pittsburgh, Pa.	4,295.05	7.89	4,302.94
111	F.L.Putnam Investment Management Co.	Wellesley, Mass.	4,207.76	94.94	4,302.70
112	Linscomb & Williams	Houston, Texas	4,255.39	1.31	4,256.70
113	Iron Capital Advisors	Atlanta, Ga.	1,105.66	3,119.36	4,225.02
114	Truepoint Wealth Counsel	Cincinnati, Ohio	4,190.11	20.46	4,210.57
115	Palisade Capital Management	Fort Lee, N.J.	4,171.00	35.86	4,206.86
116	Badgley Phelps Wealth Managers	Seattle, Wash.	3,868.76	337.43	4,206.19
117	Annex Wealth Management	Elm Grove, Wis.	4,040.89	163.15	4,204.03
118	Permanens Capital Partners	Charleston, S.C.	2,516.46	1,677.25	4,193.71
119	Empirical Wealth Management	Seattle, Wash.	4,173.41	5.52	4,178.93
120	Grimes & Company	Westborough, Mass.	4,094.11	83.47	4,177.58
121	Finaccess Advisors	Miami, Fla.	0.00	4,139.67	4,139.67
122	Miracle Mile Advisors	Los Angeles, Calif.	4,130.63	0.00	4,130.63
123	Crestwood Advisors Group	Boston, Mass.	4,036.39	20.80	4,057.19
124	Cassaday & Company	Mclean, Va.	4,033.82	0.00	4,033.82
125	Gradient Investments	Arden Hills, Minn.	4,017.97	0.00	4,017.97
126	Bordeaux Wealth Advisors	Menlo Park, Calif.	3,312.22	694.46	4,006.68
127	Crescent Grove Advisors	Lake Forest, Ill.	3,861.63	51.28	3,912.91
128	Chicago Partners Wealth Advisors	Chicago, Ill.	3,484.34	416.58	3,900.92
129	Allegheny Financial Group	Pittsburgh, Pa.	3,567.93	221.93	3,789.86
130	Exencial Wealth Advisors	Oklahoma City, Okla.	3,564.85	204.79	3,769.64
131	Hamilton Capital	Columbus, Ohio	3,536.98	220.90	3,757.88
132	Brownson, Rehms & Foxworth	Chicago, Ill.	0.00	3,722.14	3,722.14
133	Robertson Stephens Wealth Management	San Francisco, Calif.	2,912.09	781.94	3,694.03
134	Kovack Advisors	Fort Lauderdale, Fla.	2,954.83	695.86	3,650.70
135	Crestone Capital	Boulder, Colo.	3,429.19	217.33	3,646.52
136	Certuity (formerly Camden Capital)	North Palm Beach, Fla.	2,390.68	1,251.11	3,641.79
137	Clifford Swan Investment Counselors	Pasadena, Calif.	3,091.00	539.00	3,630.00
138	Kingsview Wealth Management	Grants Pass, Ore.	3,584.12	0.00	3,584.12
139	Advance Capital Management	Southfield, Mich.	3,529.08	40.85	3,569.93
140	Westmount Asset Management	Los Angeles, Calif.	3,030.89	534.74	3,565.63
141	Callan Family Office††	Radnor, Pa.	3,047.55	493.42	3,540.97
142	Mainstay Capital Management	Grand Blanc, Mich.	3,051.72	385.62	3,437.34
143	TCI Wealth Advisors	Tucson, Ariz.	3,414.41	17.12	3,431.53
144	Axxcess Wealth Management	Carlsbad, Calif.	2,748.21	651.40	3,399.62
145	Wescott Financial Advisory Group	Philadelphia, Pa.	2,384.00	1,002.14	3,386.14
146	TFO Phoenix	Phoenix, Ariz.	3,327.82	12.64	3,340.45
147	Retirement Planners of America	Plano, Texas	3,175.53	164.11	3,339.63
148	Merriman Wealth Management	Seattle, Wash.	3,297.16	0.00	3,297.16
149	TFO-TDC dba TDC Investment Advisory	Maumee, Ohio	3,199.09	24.44	3,223.54

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-22 and % Growth In Assets Per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

*This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.*  
For reprints of this PDF please contact **Aaron Deyang** at [FAmag@wrightsmedia.com](mailto:FAmag@wrightsmedia.com).

# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)
150	Family Management Corporation	New York, N.Y.	3,117.13	38.15	3,155.27
151	Heritage Investors Management Corporation	Bethesda, Md.	3,117.15	9.65	3,126.80
152	Foster Group	West Des Moines, Iowa	2,964.08	119.21	3,083.30
153	Constellation Wealth Advisors	Cincinnati, Ohio	1,701.64	1,345.70	3,047.34
154	Sand Hill Global Advisors	Palo Alto, Calif.	2,968.44	69.49	3,037.94
155	True North Advisors	Dallas, Texas	2,962.27	44.13	3,006.40
156	Carlson Capital Management	Northfield, Minn.	2,968.55	24.81	2,993.36
157	CM Wealth Advisors	Beachwood, Ohio	2,852.29	132.23	2,984.53
158	JFS Wealth Advisors	Hermitage, Pa.	2,637.78	345.90	2,983.68
159	Telemus Capital	Southfield, Mich.	2,391.50	580.70	2,972.20
160	Accredited Investors Wealth Management	Edina, Minn.	2,771.91	184.45	2,956.36
161	Altium Wealth Management	Purchase, N.Y.	2,942.45	0.00	2,942.45
162	Sowell Management	North Little Rock, Ark.	2,892.38	0.38	2,892.76
163	Lake Street Advisors	Portsmouth, N.H.	1,066.13	1,822.26	2,888.38
164	CreativeOne Wealth	Overland Park, Kan.	2,879.55	0.00	2,879.55
165	AGW Capital Advisors	Tampa, Fla.	785.18	2,073.60	2,858.78
166	Schechter Investment Advisors	Birmingham, Mich.	2,473.05	374.00	2,847.05
167	Abacus Wealth Partners	Santa Monica, Calif.	2,820.59	13.85	2,834.45
168	GenTrust	Miami, Fla.	2,426.45	376.02	2,802.47
169	Bragg Financial Advisors	Charlotte, N.C.	2,798.67	0.00	2,798.67
170	The Wealth Consulting Group	Las Vegas, Nev.	2,795.71	0.09	2,795.80
171	Klingman & Associates	New York, N.Y.	2,523.01	254.25	2,777.26
172	HoyleCohen	San Diego, Calif.	2,739.82	0.00	2,739.82
173	Halbert Hargrove	Long Beach, Calif.	2,586.64	148.39	2,735.03
174	Beaumont Financial Partners	Needham, Mass.	1,972.61	753.89	2,726.50
175	Yale Capital Corp.	Saint Petersburg, Fla.	2,722.85	0.00	2,722.85
176	Smith Salley Wealth Management	Greensboro, N.C.	2,709.13	0.47	2,709.59
177	Sage Financial Group	Conshohocken, Pa.	2,500.00	202.00	2,702.00
178	Evensky Katz	Coral Gables, Fla.	2,640.71	0.00	2,640.71
179	Henssler Financial	Kennesaw, Ga.	2,174.53	464.83	2,639.37
180	Coastal Bridge Advisors	Westport, Conn.	2,605.17	15.01	2,620.18
181	Wealthcare Capital Management	Richmond, Va.	2,570.37	32.68	2,603.04
182	Connecticut Wealth Management	Farmington, Conn.	2,506.96	82.94	2,589.91
183	Dakota Wealth	Palm Beach Gardens, Fla.	2,543.35	4.80	2,548.15
184	IFG Advisory	Atlanta, Ga.	2,421.18	111.47	2,532.64
185	The Welch Group	Birmingham, Ala.	2,522.23	0.00	2,522.23
186	GM Advisory Group	Melville, N.Y.	1,643.83	870.88	2,514.70
187	Wellesley Asset Management	Wellesley, Mass.	2,392.07	2.45	2,394.52
188	Morton Wealth	Calabasas, Calif.	2,342.28	35.43	2,377.71
189	MCF Advisors	Covington, Ky.	1,587.06	739.05	2,326.11
190	XML Financial Group	Bethesda, Md.	1,318.34	1,004.70	2,323.03
191	Resource Consulting Group	Orlando, Fla.	2,316.72	0.00	2,316.72
192	Bogart Wealth	McLean, Va.	1,496.91	785.31	2,282.22
193	Chicago Capital	Chicago, Ill.	2,245.63	12.24	2,257.87
194	Marcum Wealth	Cleveland, Ohio	2,221.20	29.63	2,250.83
195	Cardiff Park Advisors	Carlsbad, Calif.	78.08	2,128.22	2,206.30
196	Vigilant Wealth Management	Portland, Maine	2,200.86	0.00	2,200.86
197	Baker Avenue Wealth Management	San Francisco, Calif.	2,200.00	0.00	2,200.00
198	Capital Wealth Advisors	Naples, Fla.	2,087.02	90.92	2,177.94
199	Schneider Downs Wealth Mgmt. Advisors	Pittsburgh, Pa.	1,557.74	617.27	2,175.01

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-22 and % Growth In Assets Per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

*This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.*  
For reprints of this PDF please contact **Aaron Deyang** at **FAmag@wrightsmedia.com**.

# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)
200	Team Hewins	Redwood City, Calif.	1,184.19	989.53	2,173.72
201	FAS Wealth Partners	Leawood, Kan.	2,114.78	40.81	2,155.59
202	Retirement Income Solutions	Ann Arbor, Mich.	2,145.73	0.00	2,145.73
203	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	2,006.00	105.00	2,111.00
204	Gratus Capital	Atlanta, Ga.	2,042.41	60.66	2,103.07
205	Birch Hill Investment Advisors	Boston, Mass.	2,064.58	0.00	2,064.58
206	Arnerich Massena	Portland, Ore.	1,056.16	1,008.20	2,064.37
207	Chesley, Taft & Associates	Chicago, Ill.	1,903.50	155.82	2,059.31
208	Regal Investment Advisors	Kentwood, Mich.	2,026.54	16.21	2,042.75
209	Inspire Investing	Meridian, Idaho	2,031.61	0.00	2,031.61
210	SJS Investment Services	Sylvania, Ohio	2,028.89	0.00	2,028.89
211	Osborne Partners Capital Management	San Francisco, Calif.	1,958.15	40.14	1,998.29
212	Summitry	Foster City, Calif.	1,868.00	120.69	1,988.68
213	CPS Investment Advisors	Lakeland, Fla.	1,988.22	0.00	1,988.22
214	GHP Investment Advisors	Denver, Colo.	1,922.31	62.39	1,984.69
215	Foster & Motley	Cincinnati, Ohio	1,913.32	48.05	1,961.37
216	Zemenick & Walker	Saint Louis, Mo.	0.00	1,959.09	1,959.09
217	CoreCap Advisors	Southfield, Mich.	1,957.27	0.00	1,957.27
218	LVW Advisors	Pittsford, N.Y.	1,450.92	482.87	1,933.79
219	Heritage Financial Services	Westwood, Mass.	1,930.82	0.00	1,930.82
220	RTD Financial Advisors	Philadelphia, Pa.	1,884.72	39.82	1,924.54
221	Certified Advisory Corp	Altamonte Springs, Fla.	1,921.93	0.00	1,921.93
222	Glassman Wealth Services	Vienna, Va.	1,851.07	56.16	1,907.22
223	Performance Wealth	Hinsdale, Ill.	1,888.67	12.36	1,901.03
224	West Financial Services	McLean, Va.	1,881.28	17.41	1,898.69
225	Courier Capital	Buffalo, N.Y.	1,634.24	263.77	1,898.01
226	Obermeyer Wood Investment Counsel	Aspen, Colo.	1,886.99	0.00	1,886.99
227	SFMG Wealth Advisors	Plano, Texas	1,721.26	163.69	1,884.95
228	BLB&B Advisors	Montgomeryville, Pa.	1,766.72	112.23	1,878.94
229	Kowal Investment Group	Waukesha, Wis.	949.00	890.00	1,839.00
230	Capstone Financial Advisors	Downers Grove, Ill.	1,815.27	9.59	1,824.85
231	Guyasuta Investment Advisors	Pittsburgh, Pa.	1,814.72	0.00	1,814.72
232	CFS Investment Advisory Services	Totowa, N.J.	1,121.92	672.55	1,794.47
233	Legacy Wealth Management	Memphis, Tenn.	1,684.16	94.25	1,778.42
234	IPI Wealth Management	Decatur, Ill.	1,628.81	147.98	1,776.79
235	Sather Financial Group	Victoria, Texas	1,764.38	0.00	1,764.38
236	Stonebridge Capital Advisors	Saint Paul, Minn.	1,706.18	54.18	1,760.36
237	Stokes Family Office	New Orleans, La.	1,556.31	175.75	1,732.06
238	Lutz Financial	Omaha, Neb.	1,558.73	172.76	1,731.48
239	Prosperity Capital Advisors	Westlake, Ohio	1,712.43	0.00	1,712.43
240	Fairway Wealth Management	Independence, Ohio	7.20	1,645.29	1,652.49
241	LBMC Investment Advisors	Brentwood, Tenn.	1,610.59	13.07	1,623.66
242	ProVise Management Group	Clearwater, Fla.	1,607.81	8.62	1,616.43
243	Pinnacle Wealth Planning Services	Mansfield, Ohio	1,598.87	10.54	1,609.40
244	Fairview Capital Investment Management	Greenbrae, Calif.	1,540.98	0.00	1,540.98
245	ML&R Wealth Management	Austin, Texas	1,528.21	9.89	1,538.10
246	Conservest Capital Advisors	Wynnewood, Pa.	1,515.92	20.74	1,536.66
247	Tom Johnson Investment Management	Oklahoma City, Okla.	1,519.43	0.00	1,519.43
248	Cornerstone Advisory	Hunt Valley, Md.	1,515.98	0.00	1,515.98
249	Van Hulzen Asset Management	El Dorado Hills, Calif.	1,498.68	14.35	1,513.03

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/20/20). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-22 and % Growth In Assets Per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited. For reprints of this PDF please contact Aaron Deyang at [FAmag@wrightsmedia.com](mailto:FAmag@wrightsmedia.com).

# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)
250	Abacus Planning Group	Columbia, S.C.	1,456.26	51.14	1,507.41
251	AlphaCore Wealth Advisory	La Jolla, Calif.	1,124.49	373.04	1,497.53
252	Wealthquest	Cincinnati, Ohio	1,491.11	2.88	1,493.99
253	California Financial Advisors	San Ramon, Calif.	1,262.48	227.47	1,489.95
254	Meyer Capital Group	Marlton, N.J.	993.00	491.00	1,484.00
255	Cabana Asset Management	Fayetteville, Ark.	1,476.78	0.00	1,476.78
256	Red Door Wealth Management	Memphis, Tenn.	1,157.43	286.26	1,443.69
257	Baltimore Washington Financial Advisors	Columbia, Md.	1,365.67	76.91	1,442.58
258	RKL Wealth Management	Lancaster, Pa.	1,260.95	170.90	1,431.85
259	Condor Capital Wealth Management	Martinsville, N.J.	1,164.43	265.10	1,429.53
260	Patriot Investment Management Group	Knoxville, Tenn.	1,409.46	5.38	1,414.83
261	Ensemble Capital Management	San Francisco, Calif.	1,410.95	0.00	1,410.95
262	RZH Advisors	Stamford, Conn.	1,401.65	0.00	1,401.65
263	Berger Financial Group	Plymouth, Minn.	1,400.00	0.00	1,400.00
264	Beaird Harris Wealth Management	Dallas, Texas	1,379.51	19.41	1,398.92
265	Altfest Personal Wealth Management	New York, N.Y.	1,373.29	16.79	1,390.09
266	Elser Financial Planning	Indianapolis, Ind.	660.68	719.17	1,379.85
267	HCR Wealth Advisors	Los Angeles, Calif.	1,374.50	0.00	1,374.50
268	Rebalance	Bethesda, Md.	1,360.00	0.00	1,360.00
269	SilverOak Wealth Management	Edina, Minn.	1,285.37	69.44	1,354.80
270	Tschetter Group	Bellevue, Wash.	965.29	370.77	1,336.06
271	3EDGE Asset Management	Naples, Fla.	1,332.68	0.00	1,332.68
272	HUB Investment Advisors	Omaha, Neb.	260.94	1,054.16	1,315.10
273	Nottingham Advisors	Amherst, N.Y.	1,232.91	68.10	1,301.01
274	Narwhal Capital Management	Marietta, Ga.	1,144.45	151.85	1,296.30
275	Diversified	Wilmington, Del.	1,176.49	113.16	1,289.65
276	SAX Wealth Advisors	Parsippany, N.J.	1,258.46	29.23	1,287.69
277	Austin Asset	Austin, Texas	1,265.58	0.00	1,265.58
278	Magnus Financial Group	New York, N.Y.	1,254.79	5.73	1,260.52
279	Diversified Portfolios	Bloomfield Hills, Mich.	1,232.84	20.62	1,253.46
280	Atwood & Palmer	Kansas City, Mo.	1,251.94	0.00	1,251.94
281	Smith Anglin Financial	Dallas, Texas	1,221.83	23.25	1,245.09
282	Mayflower Advisors	Boston, Mass.	1,028.57	215.00	1,243.57
283	Bitterroot Capital Advisors	Bozeman, Mont.	97.54	1,131.18	1,228.72
284	TFC Financial Management	Boston, Mass.	1,226.53	0.00	1,226.53
285	Azzad Asset Management	Falls Church, Va.	1,219.75	6.14	1,225.89
286	Per Stirling Capital Management	Westlake Hills, Texas	1,184.82	0.00	1,184.82
287	Investment Counsel Company	Las Vegas, Nev.	961.91	218.83	1,180.74
288	Segment Wealth Management	Houston, Texas	1,171.64	0.00	1,171.64
289	Bloom Advisors	Farmington Hills, Mich.	1,155.07	0.00	1,155.07
290	R W Investment Management	Eagle, Idaho	886.91	267.93	1,154.85
291	BigSur Wealth Management	Miami, Fla.	514.70	639.70	1,154.40
292	Traphagen Investment Advisors	Oradell, N.J.	1,128.89	23.10	1,151.99
293	TrinityPoint Wealth	Milford, Conn.	1,036.33	112.70	1,149.03
294	Valley National Adviser	Bethlehem, Pa.	1,129.29	0.00	1,129.29
295	Madison Wealth Management	Cincinnati, Ohio	1,123.86	0.00	1,123.86
296	The Weil Company dba Christopher Weil & Co.	San Diego, Calif.	1,063.47	43.71	1,107.18
297	Telos Capital Management	San Diego, Calif.	1,101.82	0.00	1,101.82
298	Financial Synergies Wealth Advisors	Houston, Texas	1,091.13	0.00	1,091.13
299	Wealthstream Advisors	New York City, N.Y.	1,075.08	0.00	1,075.08

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-22 and % Growth In Assets Per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

*This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.*  
For reprints of this PDF please contact **Aaron Deyang** at [FAmag@wrightsmedia.com](mailto:FAmag@wrightsmedia.com).



# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)
300	Titleist Asset Management	San Antonio, Texas	960.50	112.14	1,072.64
301	Blue Chip Partners	Farmington Hills, Mich.	1,042.90	9.11	1,052.01
302	Sheaff Brock Investment Advisors	Indianapolis, Ind.	1,049.30	0.38	1,049.68
303	Nilsine Partners	Greenwood Village, Colo.	831.50	217.06	1,048.57
304	PDS Planning	Dublin, Ohio	981.16	64.42	1,045.59
305	Weatherly Asset Management	Del Mar, Calif.	1,004.92	8.84	1,013.76
306	Palisade Asset Management	Minneapolis, Minn.	923.73	88.48	1,012.21
307	Paragon Capital Management	Denver, Colo.	883.13	119.67	1,002.80
308	StraightLine Group	Troy, Mich.	953.74	48.82	1,002.56
309	SPC Financial	Rockville, Md.	995.46	4.69	1,000.15
<b>ASSET CATEGORY: \$500 MILLION TO &lt; \$1 BILLION</b>					
310	Delta Financial Group	Basking Ridge, N.J.	934.35	61.96	996.31
311	Destiny Wealth Partners	Tavares, Fla.	883.73	103.24	986.97
312	Wedmont Private Capital	West Chester, Pa.	958.39	25.68	984.07
313	BFSG	Irvine, Calif.	976.61	0.36	976.97
314	Agili	Richmond, Va.	969.90	2.64	972.54
315	CJM Wealth Advisers	Falls Church, Va.	926.54	43.72	970.25
316	Virtue Capital Management	Brentwood, Tenn.	941.39	0.00	941.39
317	Janiczek Wealth Management	Denver, Colo.	940.87	0.00	940.87
318	Cadinha & Co.	Honolulu, Hawaii	931.26	8.09	939.35
319	Regatta Capital Group	El Segundo, Calif.	784.53	146.90	931.43
320	Retirement Investment Advisors	Oklahoma City, Okla.	927.76	2.09	929.85
321	Petersen Hastings Investment Management	Kennewick, Wash.	927.09	0.00	927.09
322	Delegate Advisors	Chapel Hill, N.C.	160.94	741.50	902.44
323	Moisand Fitzgerald Tamayo	Orlando, Fla.	893.47	7.95	901.42
324	NEIRG Wealth Management	North Andover, Mass.	883.23	16.10	899.33
325	REDW Wealth	Albuquerque, N.M.	896.40	0.00	896.40
326	Willis Johnson & Associates	Houston, Texas	848.52	45.70	894.23
327	Total Wealth Planning	Blue Ash, Ohio	819.27	46.54	865.82
328	MJP Wealth Advisers	Farmington, Conn.	853.43	10.95	864.38
329	Apriem Advisors	Irvine, Calif.	854.89	7.17	862.06
330	DiNuzzo Private Wealth	Beaver, Pa.	842.11	0.00	842.11
331	Signet Financial Management	Parsippany, N.J.	839.65	0.00	839.65
332	Halpern Financial†††	Ashburn, Va.	828.83	0.00	828.83
333	Austin Private Wealth	Austin, Texas	811.83	11.27	823.11
334	Spectrum Wealth Management	Indianapolis, Ind.	758.29	51.72	810.00
335	Evermay Wealth Management	Arlington, Va.	791.10	8.42	799.52
336	Lake Street	Chicago, Ill.	755.33	41.03	796.37
337	Financial Advisory Corporation	Grand Rapids, Mich.	795.72	0.00	795.72
338	Seasons of Advice Wealth Management	New York, N.Y.	751.17	38.11	789.28
339	Abound Wealth Management	Franklin, Tenn.	787.15	0.00	787.15
340	WPWealth	Fort Worth, Texas	513.63	265.64	779.27
341	Stage Harbor Financial	Needham, Mass.	775.23	0.00	775.23
342	HCM Wealth Advisers	Cincinnati, Ohio	771.84	0.00	771.84
343	Glass Jacobson Wealth Advisors	Owings Mills, Md.	759.58	10.50	770.08
344	Yeske Buie	San Francisco, Calif.	759.24	8.43	767.66
345	Rappaport Reiches Capital Management	Skokie, Ill.	765.00	0.00	765.00
346	Southern Financial Group	Birmingham, Ala.	741.14	0.00	741.14
347	WorthPointe	San Diego, Calif.	733.35	0.00	733.35
348	Fermata Advisors	Sonoma, Calif.	670.00	63.00	733.00

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-22 and % Growth In Assets Per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited. For reprints of this PDF please contact Aaron Deyang at [FAmag@wrightsmedia.com](mailto:FAmag@wrightsmedia.com).

# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)
349	The Advisory Group of San Francisco	San Francisco, Calif.	730.00	0.00	730.00
350	Socius Family Office	Fort Lauderdale, Fla.	649.42	78.77	728.19
351	Omnia Family Wealth	Aventura, Fla.	602.20	119.90	722.10
352	Aufman Associates	Sewickley, Pa.	716.06	0.00	716.06
353	Ullmann Wealth Partners	Jacksonville Beach, Fla.	699.04	7.75	706.79
354	Concentus Wealth Advisors	Newtown Square, Pa.	679.00	21.00	700.00
355	Souders Financial Advisors	Cincinnati, Ohio	529.22	167.85	697.06
356	Chemistry Wealth Management	New York, N.Y.	685.66	7.57	693.23
357	Blankinship & Foster	Solana Beach, Calif.	690.04	0.00	690.04
358	Rainey & Randall Investment Management	Celebration, Fla.	677.11	0.00	677.11
359	The Arkansas Financial Group	Little Rock, Ark.	668.25	0.00	668.25
360	Briaud Financial Advisors	College Station, Texas	652.09	12.20	664.29
361	Leisure Capital Management	Costa Mesa, Calif.	664.27	0.00	664.27
362	CapSouth Wealth Management	Dothan, Ala.	276.99	384.02	661.01
363	Fi3 Financial Advisors	Indianapolis, Ind.	577.61	79.60	657.21
364	Next Level Private	Harrison, N.Y.	656.22	0.00	656.22
365	Financial Enhancement Group	Anderson, Ind.	650.00	0.00	650.00
366	Chequers Financial Management	San Francisco, Calif.	531.97	110.96	642.94
367	Tobias Financial Advisors	Plantation, Fla.	622.00	19.00	641.00
368	Porter White Investment Advisors	Birmingham, Ala.	638.43	2.23	640.66
369	StrategicPoint Investment Advisors	Providence, R.I.	637.57	0.00	637.57
370	PJS Investment Management	Cedarburg, Wis.	612.67	24.86	637.53
371	Element Pointe Family Office	Miami, Fla.	583.57	53.16	636.74
372	Opal Wealth Advisors	Jericho, N.Y.	456.82	176.28	633.10
373	Duncan Williams Asset Management	Memphis, Tenn.	586.34	45.68	632.03
374	Great Lakes Retirement	Sheffield Village, Ohio	575.67	49.26	624.94
375	Investmark Advisory Group	Shelton, Conn.	623.17	0.00	623.17
376	Financial Insights Wealth Management	Tacoma, Wash.	621.06	0.00	621.06
377	Mirador Capital Partners	Pleasanton, Calif.	620.00	0.00	620.00
378	Shorepoint Capital Partners	Norwood, Mass.	591.21	27.13	618.34
379	BlueSky Wealth Advisors	New Bern, N.C.	612.43	0.00	612.43
380	KMH Wealth Management	Victoria, Texas	598.32	8.72	607.04
381	Fairhaven Wealth Management	Wheaton, Ill.	600.79	5.90	606.68
382	The L. Warner Companies	Timonium, Md.	605.99	0.00	605.99
383	Droms Strauss Wealth Management	Saint Louis, Mo.	589.30	3.33	592.63
384	Asset Management Group	Stamford, Conn.	590.75	0.00	590.75
385	Spectrum Investment Advisors	Mequon, Wis.	586.11	4.17	590.28
386	Frazier Financial Advisors	Columbus, Ohio	550.00	40.00	590.00
387	Klaas Financial Asset Advisors	Loves Park, Ill.	587.38	0.00	587.38
388	Diesslin Group	Fort Worth, Texas	513.78	69.62	583.40
389	High Net Worth Advisory Group	Naples, Fla.	550.09	28.95	579.04
390	McIlrath & Eck	Arlington, Wash.	566.20	0.00	566.20
391	Summit Wealth Partners	Orlando, Fla.	527.32	38.40	565.72
392	Greystone Financial Group	Bloomfield Hills, Mich.	556.35	8.57	564.91
393	Elwood & Goetz Wealth Advisory Group	Athens, Ga.	564.49	0.00	564.49
394	Meritas Wealth Management	Larkspur, Calif.	560.57	0.00	560.57
395	Optas Capital	Austin, Texas	548.23	0.00	548.23
396	Catalyst Financial Partners	Boston, Mass.	533.10	14.19	547.29
397	Excalibur Management Corp.	Newton, Mass.	534.24	6.72	540.96
398	Rowling & Associates	San Diego, Calif.	501.81	28.17	529.98

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-22 and % Growth In Assets Per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

*This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.*  
For reprints of this PDF please contact **Aaron Deyang** at **FAmag@wrightsmedia.com**.

# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)
399	Falcon Wealth Planning†††	Ontario, Calif.	507.43	20.71	528.14
400	Marotta Wealth Management	Charlottesville, Va.	504.64	20.12	524.76
401	Net Worth Advisory Group	Sandy, Utah	322.57	201.87	524.43
402	Financial Management Strategies	Broadview Hts., Ohio	423.12	99.19	522.31
403	Level Financial Advisors	Amherst, N.Y.	519.65	0.00	519.65
404	Carolina Wealth Management	Greenville, N.C.	2.18	513.70	515.88
405	Grand Wealth Management	Grand Rapids, Mich.	509.77	0.00	509.77
406	J.W. Coons Advisors	Columbus, Ohio	449.38	53.19	502.57
<b>ASSET CATEGORY: \$250 MILLION TO &lt;\$500 MILLION</b>					
407	Arista Wealth Management	Las Vegas, Nev.	391.19	105.36	496.55
408	NorthCape Wealth Management	Williamsville, N.Y.	477.69	15.13	492.81
409	Sikich Financial	Springfield, Ill.	486.38	0.00	486.38
410	Hopwood Financial Services	Reston, Va.	486.26	0.00	486.26
411	Jentner Wealth Management	Akron, Ohio	481.07	0.00	481.07
412	Bridge Advisory	Pasadena, Calif.	427.38	31.79	459.17
413	Financial Alternatives	La Jolla, Calif.	455.45	3.53	458.98
414	Gradient Capital Advisors	San Diego, Calif.	392.91	64.23	457.14
415	Vance Wealth	Santa Clarita, Calif.	370.77	77.97	448.75
416	Wilsey Asset Management	San Diego, Calif.	444.88	1.09	445.97
417	Clune & Associates	Chicago, Ill.	260.66	173.05	433.70
418	JVL Wealth Strategies	Wyoming, Mich.	422.32	9.42	431.74
419	Manske Wealth Management	Houston, Texas	426.44	0.00	426.44
420	WJ Interests	Sugar Land, Texas	426.00	0.00	426.00
421	Ballast	Lexington, Ky.	402.81	20.60	423.41
422	Pinnacle Financial Group	Western Springs, Ill.	398.32	23.21	421.53
423	Rose Capital Advisors	Miami Beach, Fla.	245.47	164.13	409.59
424	Trinity Financial Advisors	Columbus, Ohio	399.15	0.00	399.15
425	ARQ Wealth Advisors	Scottsdale, Ariz.	395.00	2.00	397.00
426	Asio Capital	Lexington, Ky.	393.29	2.10	395.39
427	Asset Planning	Cypress, Calif.	393.29	1.09	394.38
428	Transitions Wealth Management	Denver, Colo.	391.58	0.00	391.58
429	Andrews, Lucia Wealth Management	Danville, Calif.	387.62	0.00	387.62
430	QP Consulting	Takoma Park, Md.	49.52	325.26	374.78
431	Fiduciary Wealth Management	Reston, Va.	104.87	264.60	369.46
432	Sandbox Financial Partners	Bethesda, Md.	330.33	34.13	364.46
433	ShoreHaven Wealth Partners	Red Bank, N.J.	342.02	19.41	361.43
434	Alpha Financial Advisors	Charlotte, N.C.	353.65	0.00	353.65
435	Kercheville Advisors	San Antonio, Texas	339.64	8.06	347.71
436	Reston Wealth Management	Reston, W.Va.	334.84	11.12	345.96
437	Allodium Investment Consultants	Minneapolis, Minn.	342.72	0.00	342.72
438	Poehling Capital Management	Madison, Wis.	338.09	0.00	338.09
439	Searcy Financial Services	Overland Park, Kan.	329.51	4.94	334.44
440	Winch Financial	Appleton, Wis.	333.93	0.00	333.93
441	StrongBox Wealth	Lee's Summit, Mo.	315.77	18.09	333.86
442	McCarthy Asset Management	Redwood Shores, Calif.	326.14	0.00	326.14
443	Jackson Square Capital	San Francisco, Calif.	211.58	104.83	316.41
444	Branson, Fowlkes & Company	Houston, Texas	262.82	45.98	308.79
445	Baron Financial Group	Fair Lawn, N.J.	297.14	3.51	300.65
446	WealthCrest Financial Services	Springfield, Va.	295.29	0.00	295.29
447	Oliver Capital Management	Seattle, Wash.	34.28	254.87	289.16

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-22 and % Growth In Assets Per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

*This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.*  
For reprints of this PDF please contact **Aaron Deyang** at [FAmag@wrightsmedia.com](mailto:FAmag@wrightsmedia.com).

# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)
448	R.W. Rogé & Company	Bohemia, N.Y.	273.00	15.00	288.00
449	Harbor Financial Group dba Harbor Wealth Mgmt.	Boulder, Colo.	278.78	4.30	283.08
450	Camarda Wealth Advisory Group	Fleming Island, Fla.	275.39	6.80	282.19
451	Sard Wealth Management Group	Atlanta, Ga.	265.76	13.08	278.84
452	Centerline Wealth Advisors	Louisville, Ky.	250.00	25.00	275.00
453	Dickmeyer Boyce Financial Management	Fort Wayne, Ind.	274.76	0.00	274.76
454	Fidato Wealth	Middleburg Heights, Ohio	270.69	0.00	270.69
455	Legacy Consulting Group	Plano, Texas	257.28	11.95	269.23
456	Fortune Wealth Management	Dallas, Texas	259.17	5.40	264.57
457	Merkle Retirement Planning	Grimes, Iowa	262.51	0.00	262.51
458	Sebold Capital Management	Lisle, Ill.	196.25	62.46	258.71
459	Etesian Wealth Advisors	West Linn, Ore.	251.84	6.57	258.41
460	Portfolio Wealth Advisors	Albuquerque, N.M.	254.25	0.00	254.25
461	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	242.02	9.22	251.24
462	Ted Buchan & Company	San Diego, Calif.	223.03	27.97	251.00
463	Pearson Creek Capital Management	Chicago, Ill.	250.00	0.00	250.00
<b>ASSET CATEGORY: \$150 MILLION TO &lt;\$250 MILLION</b>					
464	Family Wealth Advisory Group	Cincinnati, Ohio	156.31	75.96	232.27
465	Life Planning Partners	Jacksonville, Fla.	231.54	0.53	232.07
466	Empyrion Wealth Management	Roseville, Calif.	230.80	0.00	230.80
467	Veripax Wealth Management	Folsom, Calif.	229.65	0.83	230.48
468	Vaughan & Co. Securities	Ridgewood, N.J.	200.00	26.00	226.00
469	Sharper & Granite	El Segundo, Calif.	224.43	0.00	224.43
470	O'Keefe Stevens Advisory	Rochester, N.Y.	215.82	0.00	215.82
471	FSA Advisors	Warren, Mich.	212.34	2.05	214.40
472	Foresight Capital Management Advisors	Saline, Mich.	211.25	1.18	212.43
473	Integrated Capital Management	Bloomfield Hills, Mich.	211.17	0.00	211.17
474	Canter Wealth	San Diego, Calif.	203.47	0.00	203.47
475	Kemp Financial Management	Fullerton, Calif.	0.00	202.72	202.72
476	Private Capital Management	Larkspur, Calif.	187.63	12.82	200.45
477	Cathy Pareto And Associates	Coral Gables, Fla.	197.36	0.00	197.36
478	Fortitude Family Office	Scottsdale, Ariz.	167.55	28.79	196.35
479	Kotys Wealth Professionals	Valparaiso, Ind.	189.00	0.00	189.00
480	Charleston Financial Advisors	Charleston, S.C.	184.28	1.64	185.92
481	Granite Financial Group	Brookfield, Wis.	162.90	22.20	185.10
482	TABR Capital Management	Orange, Calif.	182.29	0.00	182.29
483	Byrne Asset Management	Kingston, N.J.	180.66	0.00	180.66
484	Professional Financial Strategies	Pittsford, N.Y.	151.00	27.93	178.92
485	Center For Asset Management	Palm Beach Gardens, Fla.	174.44	0.00	174.44
486	AlbanyAdvisor Group	Albany, N.Y.	9.30	163.38	172.69
487	Integras Partners	Alpharetta, Ga.	172.00	0.00	172.00
488	Longview Financial Advisors	Huntsville, Ala.	171.05	0.10	171.15
489	RHS Financial	San Francisco, Calif.	158.34	6.99	165.33
490	Beacon Financial Advisors	Rye Brook, N.Y.	149.87	11.02	160.89
491	Westview Investment Advisors	Burlington, Vt.	155.76	1.61	157.37
492	Purtill Financial	Highland Heights, Ohio	0.00	157.36	157.36
493	Gold Medal Waters	Boulder, Colo.	148.62	6.33	154.95
<b>ASSET CATEGORY: \$50 MILLION TO &lt;\$150 MILLION</b>					
494	Smith Bruer Advisors	Tallahassee, Fla.	99.57	46.96	146.53
495	Flagship Capital Management	Media, Pa.	145.00	0.00	145.00

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth In Assets 2021-22 and % Growth In Assets Per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

*This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.*  
For reprints of this PDF please contact [Aaron Deyang at Fmag@wrightsmedia.com](mailto:AaronDeyang@Fmag@wrightsmedia.com).



# FA's 2023 RIA's Discretionary & Non-Discretionary AUM

2022 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2022 (\$MM)	NON-DISCRETIONARY ASSETS 2022 (\$MM)	YEAR END 2022 ASSETS (\$MM)
496	Alpha Wealth Strategies	Cypress, Texas	143.18	0.00	143.18
497	Elderado Financial	Montrose, Colo.	142.04	0.00	142.04
498	CrossGrain Family Investments	Henrico, Va.	121.02	20.94	141.96
499	Paragon Wealth Management	Provo, Utah	128.18	8.39	136.58
500	Ivy League Financial Advisors	Rockville, Md.	115.05	0.00	115.05
501	Steward Advisors	Chicago, Ill.	111.80	3.15	114.95
502	S.P. Parkin & Co.	Chesterfield, Mo.	107.80	0.00	107.80
503	Shapiro Financial Security Group	Hazlet, N.J.	93.19	11.98	105.17
504	Strada Management	West Lake Hills, Texas	10.00	90.00	100.00
505	MTR Financial Services	Kingwood, Texas	80.72	0.00	80.72
506	Brighton Financial Planning	Flemington, N.J.	69.20	7.29	76.49
507	Chilmark Financial Advisors	Miami, Fla.	75.24	0.00	75.24
508	Meritas Advisors	San Rafael, Calif.	63.23	9.00	72.23
509	Graf Financial	Baton Rouge, La.	71.38	0.49	71.87
510	Sherwood Investments	Redmond, Wash.	70.00	0.00	70.00
511	Oak Street Advisors	Myrtle Beach, S.C.	69.66	0.30	69.96
512	Walnut Investment Services	Brooklyn, N.Y.	61.00	0.00	61.00
513	Holbrook Management	Dallas, Texas	60.51	0.00	60.51
514	Ankerstar Wealth	Round Rock, Texas	46.45	5.83	52.28
515	Shriver Investments	Parker, Colo.	40.71	0.00	40.71
516	The Leonard Financial Group	Riverside, Calif.	33.40	1.09	34.49
517	Safe Harbor Asset Management	Huntington, N.Y.	34.33	0.00	34.33
518	Birch Investment Management	Brookings, S.D.	18.22	0.00	18.22
519	Venn Wealth & Benefit Services	Altoona, Pa.	16.18	1.01	17.19
520	Aurora Strategic Advisors	Lumberton, N.C.	4.00	11.50	15.50
521	Atherean Wealth Management	Jersey City, N.J.	3.46	3.49	6.95

\*Average assets per client relationship. †AUM is the combined totals for Evoke Advisors and Advanced Research Services (merged as of 5/2020). ††Firm started in 2022. ††† CIBC Private Wealth Advisors' 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. Savant Wealth Management's 2022 AUM and Assets Per Client have been revised because of participant error. Halpern Financial's % Growth in Assets 2021-'22 and % Growth in Assets per Client have been revised because of participant error. Falcon Wealth Planning's 2022 and 2021 AUM, % Growth In Assets, Assets Per Client and % Growth In Assets Per Client have been revised because of participant error. FA regrets the errors.

*This PDF is for your personal, non-commercial use only. Reproductions and distribution of its contents are strictly prohibited.*  
For reprints of this PDF please contact **Aaron Deyang** at **FAmag@wrightsmedia.com**.