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2026 SURVEY & RANKING

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Firms with more than $500 million in AUM.

TOP 50 FASTEST-GROWING FIRMS

GROWTH RANK	FIRM NAME	LOCATION	2025 CLIENTS	YEAR END 2025 ASSETS ($MM)	% GROWTH IN ASSETS (2024-2025)	% GROWTH IN ASSETS PER CLIENT
1	**Arax Advisory Partners**	Denver, Colo.	7,305	11,304.03	302.98%	48.50%
2	**AlphaCore Wealth Advisory**	La Jolla, Calif.	3,372	9,028.61	200.63%	29.90%
3	**Elevation Point**	Denver, Colo.	2,896	6,300.43	158.75%	49.84%
4	**Ashton Thomas Private Wealth**	Scottsdale, Ariz.	3,326	7,437.00	157.19%	97.96%
5	**MAI Capital Management †**	Cleveland, Ohio	15,227	68,573.13	133.54%	90.35%
6	**Maridea Wealth Management**	Brooklyn, N.Y.	1,000	958.72	104.32%	2.16%
7	**Focus Partners Wealth**	St. Louis, Mo.	62,466	181,862.00	89.66%	6.26%
8	**Waverly Advisors**	Birmingham, Ala.	13,689	29,781.07	84.63%	36.02%
9	**Gateway Wealth Partners**	Appleton, Wis.	7,380	2,278.84	82.34%	1.82%
10	**Coastal Bridge Advisors**	Westport, Conn.	1,997	5,020.88	78.38%	-73.47%
11	**Beacon Pointe Advisors**	Newport Beach, Calif.	29,892	54,872.53	75.42%	29.11%
12	**Greenspring Advisors**	Towson, Md.	1,837	6,464.38	71.23%	13.53%
13	**Catalyst Financial Partners**	Boston, Mass.	367	1,722.30	68.54%	50.63%
14	**Brooklyn Fi**	Brooklyn, N.Y.	480	563.10	65.13%	30.73%
15	**CW Advisors**	Boston, Mass.	6,543	15,224.53	63.67%	-17.55%
16	**HB Wealth**	Atlanta, Ga.	5,147	30,158.40	62.22%	33.54%
17	**Compound Planning**	New York, N.Y.	2,921	4,848.63	60.27%	29.05%
18	**Stenger Family Office**	Naperville, Ill.	833	628.13	59.73%	15.05%
19	**OneSeven**	Beachwood , Ohio	5,468	7,717.77	59.18%	82.79%
20	**Aprio Wealth Management**	Atlanta, Ga.	1,699	4,154.84	57.67%	-22.14%
21	**Kingswood Wealth Advisors**	San Diego, Calif.	12,273	3,800.73	53.82%	13.49%
22	**Callan Family Office**	Radnor, Pa.	73	10,208.82	53.07%	19.52%
23	**Bellwether Wealth**	Lincoln, Neb.	503	784.02	51.94%	34.72%
24	**Rather & Kittrell**	Knoxville, Tenn.	1,111	2,252.30	51.05%	54.17%
25	**Allen Capital Group**	Grand Island, Neb.	2,261	1,501.56	50.39%	41.01%
26	**Pure Financial Advisors §**	San Diego, Calif.	7,482	11,054.06	50.35%	25.65%
27	**Cresset**	Chicago, Ill.	4,264	78,936.26	50.34%	7.92%
28	**Elm Wealth**	Philadelphia, Pa.	655	3,018.20	49.46%	10.21%
29	**MATAURO**	New York, N.Y.	877	1,047.28	48.95%	36.73%
30	**Sax Wealth Advisors**	Parsippany, N.J.	1,946	3,596.08	47.33%	-8.77%
31	**Colter Lewis Investment Partners**	Greenwich, Conn.	130	3,411.56	46.99%	28.90%
32	**Lido Advisors**	Los Angeles, Calif.	13,800	42,504.97	46.16%	-5.58%
33	**Versant Capital Management**	Phoenix, Ariz.	521	1,810.75	46.14%	51.47%
34	**ARQ Wealth Advisors**	Scottsdale, Ariz.	492	738.86	45.94%	9.75%
35	**Carnegie Investment Counsel**	Pepper Pike, Ohio	3,281	7,513.19	45.78%	22.10%
36	**Wedmont Private Capital**	West Chester, Pa.	425	3,440.71	45.13%	9.95%
37	**Fiducient Advisors**	Chicago, Ill.	689	97,541.53	44.21%	39.60%
38	**Sovran Advisors**	San Diego, Calif.	3,000	1,874.35	43.23%	133.94%
39	**United Capital Financial Advisors**	Irving, Texas	25,670	24,646.77	43.20%	27.37%
40	**Angeles Wealth Management**	Santa Monica, Calif.	209	2,800.00	41.20%	9.45%
41	**Walkner Condon Financial Advisors**	Madison, Wis.	800	1,031.18	40.71%	14.33%
42	**MCF Advisors**	Lexington, Ky.	1,776	4,684.53	40.70%	-18.00%
43	**Foundations Investment Advisors**	Phoenix, Ariz.	29,663	10,097.72	40.55%	19.24%
44	**Axxcess Wealth Management**	Carlsbad, Calif.	10,357	8,878.80	40.28%	18.19%
45	**Mercer Advisors**	Denver, Colo.	39,931	84,396.89	40.06%	15.05%
46	**Private Advisory**	Lehi, Utah	690	1,860.46	39.96%	13.59%
47	**Clearstead Advisors ‡‡**	Cleveland, Ohio	5,354	33,880.03	39.46%	24.95%
48	**Covenant Wealth Advisors**	Richmond, Va.	523	909.64	39.30%	13.73%
49	**Mission Wealth Management**	Santa Barbara, Calif.	3,716	13,912.13	38.79%	35.65%
50	**Inspire Investing**	Meridan, Idaho	455	3,962.23	38.69%	NA

† 2025 AUM is for MAI Capital Management and Evoke Advisors, a wholly owned, affiliated RIA. § 2025 AUM is as of 2/2026. ‡‡ 2025 AUM is as of 1/2026. This list has been revised due to a participant error.

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2025 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2025 ASSETS ($MM)	% GROWTH IN ASSETS (2024-2025)	ASSETS PER CLIENT ($MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
ASSET CATEGORY: 1 BILLION AND OVER							
1	**CAPTRUST**	Raleigh, N.C.	1,236,704.85	14.19%	29.62	0.76%	13.33%
2	**Edelman Financial Engines**	Boston, Mass.	326,285.24	11.40%	0.26	15.89%	-3.88%
3	**Creative Planning**	Overland Park, Kan.	295,568.60	35.96%	2.95	15.03%	18.19%
4	**Hightower Advisors**	Chicago, Ill.	195,785.22	18.80%	3.24	8.80%	9.20%
5	**Focus Partners Wealth**	St. Louis, Mo.	181,862.00	89.66%	2.91	6.26%	78.48%
6	**Cerity Partners**	New York, N.Y.	161,680.00	31.61%	3.35	3.03%	27.74%
7	**Wealth Enhancement Advisory Services**	Plymouth, Minn.	122,186.73	29.12%	1.56	16.52%	10.81%
8	**Pathstone**	Englewood, N.J.	110,295.87	9.81%	49.15	8.58%	1.13%
9	**Fiducient Advisors**	Chicago, Ill.	97,541.53	44.21%	141.57	39.60%	3.30%
10	**Mercer Advisors**	Denver, Colo.	84,396.89	40.06%	2.11	15.05%	21.74%
11	**Cresset**	Chicago, Ill.	78,936.26	50.34%	18.51	7.92%	39.30%
12	**MAI Capital Management †**	Cleveland, Ohio	68,573.13	133.54%	4.50	90.35%	22.69%
13	**CIBC Private Wealth Advisors**	Atlanta, Ga.	67,840.28	11.01%	7.42	21.97%	-8.99%
14	**Beacon Pointe Advisors**	Newport Beach, Calif.	54,872.53	75.42%	1.84	29.11%	35.87%
15	**Moneta**	St. Louis, Mo.	50,536.19	18.09%	5.52	3.37%	14.24%
16	**Lido Advisors**	Los Angeles, Calif.	42,504.97	46.16%	3.08	-5.58%	54.80%
17	**Kayne Anderson Rudnick Investment Mgmt.**	Los Angeles, Calif.	39,356.57	-13.49%	1.59	-4.05%	-9.84%
18	**Savant Wealth Management**	Rockford, Ill.	38,128.45	31.19%	1.89	8.89%	20.47%
19	**First Manhattan Co.**	New York, N.Y.	38,086.10	10.59%	13.36	6.71%	3.64%
20	**BBR Partners**	New York, N.Y.	36,493.20	17.05%	179.77	7.25%	9.14%
21	**Wealthspire**	New York, N.Y.	34,322.98	17.15%	3.04	12.37%	4.25%
22	**Clearstead Advisors ‡‡**	Cleveland, Ohio	33,880.03	39.46%	6.33	24.95%	11.61%
23	**Allworth Financial**	Folsom, Calif.	33,554.01	33.70%	1.08	24.04%	7.79%
24	**Steward Partners**	Stamford, Conn.	33,515.65	24.72%	0.69	-28.60%	74.66%
25	**HB Wealth**	Atlanta, Ga.	30,158.40	62.22%	5.86	33.54%	21.48%
26	**Waverly Advisors**	Birmingham, Ala.	29,781.07	84.63%	2.18	36.02%	35.74%
27	**Silvercrest Asset Management Group**	New York, N.Y.	28,327.99	-1.80%	34.05	-2.27%	0.48%
28	**The Baldwin Group Wealth Advisors**	Tampa, Fla.	27,276.20	29.62%	11.58	45.85%	-11.13%
29	**AlTi Tiedemann Global**	New York, N.Y.	26,516.88	7.12%	60.54	7.85%	-0.68%
30	**Summit Rock Advisors**	New York, N.Y.	26,176.16	21.85%	534.21	19.36%	2.08%
31	**1919 Investment Counsel**	Baltimore, Md.	26,036.17	8.55%	9.37	7.22%	1.24%
32	**United Capital Financial Advisors**	Irving, Texas	24,646.77	43.20%	0.96	27.37%	12.43%
33	**Oxford Financial Group**	Carmel, Ind.	23,330.85	18.73%	33.47	15.66%	2.65%
34	**Johnson Investment Counsel**	Cincinnati, Ohio	22,984.97	10.12%	4.20	3.16%	6.75%
35	**RWA Wealth Partners**	Boston, Mass.	19,795.29	14.72%	3.24	15.43%	-0.62%
36	**Choreo**	Rockford, Ill.	19,138.75	4.97%	2.73	4.97%	0.00%
37	**Modera Wealth Management**	Westwood, N.J.	17,678.21	13.98%	2.80	10.33%	3.31%
38	**Mason Investment Advisory Services**	Reston, Va.	15,671.43	18.68%	16.46	38.38%	-14.23%
39	**Evercore Wealth Management**	New York, N.Y.	15,515.91	11.64%	19.64	6.27%	5.05%
40	**Investment Research & Advisory Group**	Atlanta, Ga.	15,416.74	16.81%	50.22	8.06%	8.10%
41	**Ballentine Partners**	Waltham, Mass.	15,314.33	27.58%	44.26	22.78%	3.90%
42	**CW Advisors**	Boston, Mass.	15,224.53	63.67%	2.33	-17.55%	98.51%
43	**CV Advisors**	Aventura, Fla.	15,083.67	17.33%	99.23	-2.74%	20.63%
44	**Freestone Capital Management**	Seattle, Wash.	14,540.83	26.51%	4.67	16.00%	9.06%
45	**CLA Wealth Advisors**	Minneapolis, Minn.	14,426.64	17.03%	1.95	10.70%	5.71%
46	**Coldstream**	Bellevue, Wash.	13,925.24	33.11%	3.17	14.39%	16.37%
47	**Mission Wealth Management**	Santa Barbara, Calif.	13,912.13	38.79%	3.74	35.65%	2.31%
48	**Gresham Partners**	Chicago, Ill.	13,802.53	18.47%	108.68	14.74%	3.25%
49	**The Mather Group**	Chicago, Ill.	13,446.39	14.83%	2.70	0.44%	14.32%
50	**Valeo Financial Advisors**	Carmel, Ind.	12,958.68	21.79%	4.26	21.59%	0.16%
51	**Brookstone Capital Management**	Wheaton, Ill.	12,750.13	22.49%	0.30	19.00%	2.93%

* Average assets per client relationship. ** Cary Street Partners Investment Advisory is the parent company to Cary Street Partners Investment Advisory. † 2025 AUM is for MAI Capital Management and Evoke Advisors, a wholly owned, affiliated RIA. †† AUM is for FMB Wealth Management and FMB Retirement Services. ‡ Firm started in 2025. ‡‡ 2025 AUM is as of 1/2026. § 2025 AUM is as of 2/2026. §§ 2025 AUM is as of 3/2026. ¶ 2025 AUM is as of 4/2026. ¶¶ AUM is for Laird Norton Wetherby Wealth Management and LNW Wealth Management (merged December 2025).

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52	Caprock	Boise, Idaho	12,479.07	22.95%	28.62	15.06%	6.86%
53	Williams Jones Wealth Management	New York, N.Y.	12,474.55	7.36%	7.11	3.26%	3.97%
54	LNW ¶¶	Seattle, Wash.	12,183.78	-0.01%	19.28	1.42%	-1.40%
55	Curi Capital	Chicago, Ill.	11,582.60	17.82%	3.41	10.08%	7.04%
56	Heck Capital Advisors	Rhinelander, Wis.	11,311.72	16.97%	9.98	19.76%	-2.33%
57	Arax Advisory Partners	Denver, Colo.	11,304.03	302.98%	1.55	48.50%	171.36%
58	Perigon Wealth Management	San Francisco, Calif.	11,294.01	29.60%	1.95	9.41%	18.46%
59	Pure Financial Advisors §	San Diego, Calif.	11,054.06	50.35%	1.48	25.65%	19.65%
60	Ferguson Wellman Capital Management	Portland, Ore.	10,664.66	18.60%	9.83	12.15%	5.75%
61	Shuster Advisory Group	Pasadena, Calif.	10,318.50	30.46%	23.72	15.76%	12.69%
62	Bartlett Wealth Management	Cincinnati, Ohio	10,253.06	9.18%	4.53	8.89%	0.27%
63	Cary Street Partners Financial **	Richmond, Va.	10,252.26	24.06%	1.47	3.88%	19.43%
64	Callan Family Office	Radnor, Pa.	10,208.82	53.07%	139.85	19.52%	28.07%
65	Conrad Siegel Investment Advisors	Harrisburg, Pa.	10,118.59	11.98%	19.61	7.85%	3.82%
66	Foundations Investment Advisors	Phoenix, Ariz.	10,097.72	40.55%	0.34	19.24%	17.87%
67	Choate Investment Advisors	Boston, Mass.	10,047.92	13.21%	15.39	13.90%	-0.61%
68	Welch & Forbes	Boston, Mass.	9,903.46	8.07%	15.26	7.57%	0.46%
69	F.L.Putnam Investment Management Company	Lynnfield, Mass.	9,715.43	26.24%	3.18	5.95%	19.16%
70	SignatureFD	Atlanta, Ga.	9,675.89	20.94%	5.06	15.12%	5.05%
71	Cornerstone Advisors Asset Management	Bethlehem, Pa.	9,571.77	15.34%	19.42	12.76%	2.28%
72	Advisors Capital Management	Ridgewood, N.J.	9,470.06	27.29%	0.89	17.68%	8.16%
73	Joel Isaacson & Co.	New York, N.Y.	9,323.58	15.98%	7.34	13.52%	2.17%
74	Tolleson Wealth Management	Dallas, Texas	9,258.00	5.70%	45.61	4.13%	1.50%
75	Procyon §§	Shelton, Conn.	9,204.27	18.46%	3.02	-43.88%	111.08%
76	Bradley, Foster & Sargent	Hartford, Conn.	9,072.94	18.19%	4.67	4.88%	12.70%
77	AlphaCore Wealth Advisory	La Jolla, Calif.	9,028.61	200.63%	2.68	29.90%	131.43%
78	Simon Quick Advisors	Morristown, N.J.	9,006.81	34.09%	8.69	3.83%	29.14%
79	Axxcess Wealth Management	Carlsbad, Calif.	8,878.80	40.28%	0.86	18.19%	18.69%
80	Robertson Stephens Wealth Management	San Francisco, Calif.	8,763.97	22.76%	2.01	-42.09%	111.98%
81	Forum Financial Management	Lombard, Ill.	8,690.72	-3.76%	1.49	-8.81%	5.53%
82	SageSpring Wealth Partners	Franklin, Tenn.	8,486.11	26.78%	0.73	N/A	N/A
83	Empirical Wealth Management	Seattle, Wash.	8,428.97	25.78%	3.96	41.31%	-10.99%
84	Plancorp Wealth Management	St. Louis, Mo.	8,399.73	15.14%	5.35	15.88%	-0.63%
85	Zhang Financial	Portage, Mich.	8,370.16	27.83%	4.03	43.29%	-10.79%
86	OpenArc Corporate Advisory ‡	Atlanta, Ga.	8,100.00	N/A	2.52	N/A	N/A
87	Annex Wealth Management	Brookfield, Wis.	8,050.02	30.39%	1.18	16.93%	11.51%
88	Crestwood Advisors	Boston, Mass.	8,021.46	14.33%	6.98	14.33%	0.00%
89	HBKS Wealth Advisors	Erie, Pa.	7,808.98	14.07%	1.01	-7.34%	23.11%
90	OneSeven	Beachwood, Ohio	7,717.77	59.18%	1.41	82.79%	-12.92%
91	Ingalls & Snyder	New York, N.Y.	7,715.29	13.46%	1.73	6.71%	6.33%
92	Carnegie Investment Counsel	Pepper Pike, Ohio	7,513.19	45.78%	2.29	22.10%	19.40%
93	Ashton Thomas Private Wealth	Scottsdale, Ariz.	7,437.00	157.19%	2.24	97.96%	29.92%
94	Badgley Phelps Wealth Managers	Seattle, Wash.	7,280.76	23.34%	5.10	-5.09%	29.96%
95	Cassaday & Company	Mclean, Va.	7,138.78	19.32%	2.22	16.06%	2.81%
96	Northside Capital Management	Hood River, Ore.	6,942.21	19.18%	115.70	-16.57%	42.86%
97	Confluence Financial Partners	McMurray, Pa.	6,836.02	25.34%	1.40	29.57%	-3.27%
98	Greenspring Advisors	Towson, Md.	6,464.38	71.23%	3.52	13.53%	50.82%
99	Elevation Point	Denver, Colo.	6,300.43	158.75%	2.18	49.84%	72.69%
100	Grimes & Company	Westborough, Mass.	6,298.76	12.63%	1.67	11.07%	1.40%
101	Kovack Advisors	Fort Lauderdale, Fla.	6,279.66	13.48%	0.47	22.12%	-7.07%
102	Westmount Partners	Los Angeles, Calif.	5,938.14	14.14%	3.99	15.52%	-1.20%
103	Index Fund Advisors	Irvine, Calif.	5,929.71	11.27%	2.75	24.49%	-10.62%

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104	**Mayflower Advisors**	Boston, Mass.	5,815.58	21.68%	4.76	1.88%	19.43%
105	**SYM Financial Advisors**	Winona Lake, Ind.	5,813.23	19.13%	3.01	7.97%	10.34%
106	**Bailard**	Foster City, Calif.	5,806.13	-9.28%	5.12	-16.40%	8.51%
107	**Klingman & Associates**	New York, N.Y.	5,664.69	17.12%	8.05	11.97%	4.61%
108	**TFO Wealth Partners**	Maumee, Ohio	5,660.89	16.65%	3.45	13.74%	2.56%
109	**Allegheny Financial Group**	Pittsburgh, Pa.	5,593.59	14.06%	1.41	13.25%	0.71%
110	**Crescent Grove Advisors**	Lake Forest, Ill.	5,504.09	10.16%	14.41	9.88%	0.26%
111	**Larson Financial Group**	St. Louis, Mo.	5,481.84	35.93%	1.04	21.36%	12.01%
112	**True North Advisors**	Dallas, Texas	5,422.65	21.09%	5.50	13.11%	7.06%
113	**Constellation Wealth Advisors**	Cincinnati, Ohio	5,400.05	15.84%	27.98	61.45%	-28.25%
114	**TCI Wealth Advisors**	Tucson, Ariz.	5,368.06	18.42%	1.58	11.01%	6.68%
115	**Alesco Advisors, an ESL Company**	Pittsford, N.Y.	5,348.82	13.21%	8.37	5.42%	7.39%
116	**Stockman Wealth Management**	Billings, Mont.	5,236.00	3.37%	3.42	-7.50%	11.74%
117	**GenTrust**	Miami, Fla.	5,202.07	16.61%	19.56	6.09%	9.92%
118	**Moran Wealth Management**	Naples, Fla.	5,095.82	7.42%	2.60	11.42%	-3.59%
119	**BakerAvenue Wealth Management**	San Francisco, Calif.	5,046.04	33.81%	4.93	21.66%	9.99%
120	**TFO Family Office Partners**	Phoenix, Ariz.	5,037.05	20.87%	16.46	15.34%	4.79%
121	**Coastal Bridge Advisors**	Westport, Conn.	5,020.88	78.38%	2.51	-73.47%	572.39%
122	**Advance Capital Management**	Southfield, Mich.	4,980.84	10.58%	0.68	6.89%	3.45%
123	**Hamilton Capital**	Columbus, Ohio	4,937.44	12.68%	1.68	9.96%	2.48%
124	**Compound Planning**	New York, N.Y.	4,848.63	60.27%	1.66	29.05%	24.19%
125	**Chicago Capital**	Chicago, Ill.	4,823.33	7.72%	5.76	-2.82%	10.85%
126	**Sowell Management**	North Little Rock, Ark.	4,808.16	13.64%	0.73	12.75%	0.79%
127	**Mainstay Capital Management**	Grand Blanc, Mich.	4,802.38	15.24%	1.42	17.66%	-2.05%
128	**Foster Group**	West Des Moines, Iowa	4,775.51	34.79%	2.27	23.56%	9.09%
129	**IFG Advisory**	Atlanta, Ga.	4,759.19	19.80%	0.55	27.60%	-6.11%
130	**JFS Wealth Advisors**	Hermitage, Pa.	4,729.07	18.08%	1.84	2.82%	14.83%
131	**Klingenstein Fields Advisors**	New York, N.Y.	4,698.83	-0.81%	9.61	3.24%	-3.93%
132	**MCF Advisors**	Lexington, Ky.	4,684.53	40.70%	2.64	-18.00%	71.59%
133	**Bragg Financial Advisors**	Charlotte, N.C.	4,671.12	19.64%	8.97	-9.30%	31.90%
134	**Baker Tilly Wealth Management**	Madison, Wis.	4,601.24	3.96%	6.80	-8.48%	13.59%
135	**Capital Wealth Advisors §§**	Naples, Fla.	4,514.47	35.14%	2.29	17.69%	14.83%
136	**Clifford Swan Investment Counselors**	Pasadena, Calif.	4,482.00	8.18%	4.62	4.61%	3.41%
137	**Connecticut Wealth Management**	Farmington, Conn.	4,477.61	20.73%	2.93	9.76%	9.99%
138	**Credent Wealth Management**	Auburn, Ind.	4,464.69	34.71%	1.07	11.22%	21.12%
139	**Accredited Investors Wealth Management**	Edina, Minn.	4,412.89	18.78%	4.66	13.14%	4.99%
140	**Prosperity Capital Advisors**	Westlake, Ohio	4,362.22	18.28%	0.58	11.20%	6.37%
141	**Sage Financial Group**	Conshohocken, Pa.	4,291.84	18.42%	5.05	14.94%	3.03%
142	**Quotient Wealth Partners**	Dallas, Texas	4,289.16	21.16%	1.97	6.35%	13.92%
143	**Reynders McVeigh**	Boston, Mass.	4,227.84	7.95%	5.64	7.95%	0.00%
144	**Halbert Hargrove Global Advisors**	Long Beach, Calif.	4,203.91	19.55%	4.20	11.06%	7.64%
145	**Essex Financial**	Essex, Conn.	4,169.98	10.46%	1.41	10.61%	-0.13%
146	**Wescott Financial Advisory Group**	Philadelphia, Pa.	4,155.79	11.56%	6.93	2.27%	9.09%
147	**Aprio Wealth Management**	Atlanta, Ga.	4,154.84	57.67%	2.45	-22.14%	102.50%
148	**SteelPeak Wealth**	Woodland Hills, Calif.	4,148.08	20.62%	1.21	66.27%	-27.46%
149	**Finaccess Advisors**	Miami, Fla.	4,113.58	2.29%	40.73	4.32%	-1.94%
150	**Gerber Kawasaki Wealth and Investment Mgmt.**	Santa Monica, Calif.	4,109.61	28.76%	0.43	16.60%	10.43%
151	**Performance Wealth**	Hinsdale, Ill.	4,092.64	20.83%	4.34	6.61%	13.34%
152	**PermCap Investment Office**	Charleston, S.C.	4,017.55	-9.98%	61.81	-36.29%	41.30%
153	**Team Hewins**	Foster City, Calif.	3,966.07	15.52%	7.34	6.75%	8.22%
154	**Inspire Investing**	Meridian, Idaho	3,962.23	38.69%	8.71	N/A	N/A
155	**Wealthcare Capital Management**	Richmond, Va.	3,928.65	29.62%	0.69	15.39%	12.34%

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156	**Palisade Capital Management**	Fort Lee, N.J.	3,862.50	-8.60%	10.94	-15.85%	8.62%
157	**Henssler Financial**	Kennesaw, Ga.	3,814.46	12.08%	1.98	4.22%	7.54%
158	**Matter Family Office**	St Louis, Mo.	3,811.05	N/A	12.75	N/A	-5.08%
159	**Kingswood Wealth Advisors**	San Diego, Calif.	3,800.73	53.82%	0.31	13.49%	35.54%
160	**FAS Wealth Partners** §	Leawood, Kan.	3,776.01	22.38%	2.33	13.69%	7.65%
161	**Howland Capital**	Boston, Mass.	3,739.99	12.56%	7.60	7.98%	4.24%
162	**The Welch Group**	Mountain Brook, Ala.	3,682.45	14.65%	2.54	8.00%	6.15%
163	**Stoker Ostler Wealth Advisors**	Scottsdale, Ariz.	3,669.76	18.38%	1.72	11.32%	6.34%
164	**Sax Wealth Advisors**	Parsippany, N.J.	3,596.08	47.33%	1.85	-8.77%	61.49%
165	**Burney Company**	Reston, Va.	3,588.66	14.66%	1.85	14.19%	0.41%
166	**Abacus Wealth Partners**	Santa Monica, Calif.	3,579.24	9.43%	2.27	7.34%	1.94%
167	**Visionary Wealth Advisors**	O'Fallon, Ill.	3,539.00	23.85%	0.84	14.59%	8.07%
168	**Greenwich Wealth Management**	Greenwich, Conn.	3,518.61	29.81%	10.66	13.29%	14.58%
169	**Morton Wealth**	Calabasas, Calif.	3,465.65	17.23%	2.80	12.02%	4.65%
170	**Donaldson Capital Management**	Evansville, Ind.	3,464.30	11.87%	1.93	5.64%	5.89%
171	**Wedmont Private Capital**	West Chester, Pa.	3,440.71	45.13%	8.10	9.95%	31.99%
172	**Colter Lewis Investment Partners**	Greenwich, Conn.	3,411.56	46.99%	26.24	28.90%	14.04%
173	**Summitry**	Foster City, Calif.	3,350.46	11.36%	2.50	1.72%	9.48%
174	**Schneider Downs Wealth Mgmt. Advisors**	Pittsburgh, Pa.	3,305.79	13.51%	4.19	8.76%	4.37%
175	**Certuity**	North Palm Beach, Fla.	3,301.61	6.50%	6.58	3.96%	2.45%
176	**BLBB Advisors**	Montgomeryville, Pa.	3,255.40	18.82%	0.82	7.94%	10.08%
177	**Vista Capital Partners**	Portland, Ore.	3,220.70	18.45%	5.23	9.99%	7.69%
178	**Principle Wealth**	Madison, Conn.	3,204.65	20.52%	4.01	5.46%	14.29%
179	**Bogart Wealth**	McLean, Va.	3,190.53	6.74%	2.21	6.59%	0.14%
180	**Lutz Financial**	Omaha, Neb.	3,187.19	22.11%	3.27	11.10%	9.91%
181	**Winthrop Wealth**	Boston, Mass.	3,101.36	19.24%	1.25	1.75%	17.19%
182	**Red Door Wealth Management**	Memphis, Tenn.	3,085.70	22.42%	3.32	6.74%	14.69%
183	**1900 Wealth Management**	San Antonio, Texas	3,071.00	35.40%	6.41	24.65%	8.62%
184	**GHP Investment Advisors**	Denver, Colo.	3,063.63	12.50%	2.43	6.43%	5.70%
185	**Certified Advisory Corp**	Altamonte Springs, Fla.	3,044.54	13.86%	1.28	12.47%	1.24%
186	**Obermeyer Wealth Partners**	Aspen, Colo.	3,034.11	16.46%	4.33	12.30%	3.70%
187	**Pittenger & Anderson**	Lincoln, Neb.	3,034.07	-8.37%	3.30	-9.37%	1.10%
188	**Gibson Capital**	Wexford, Pa.	3,034.03	15.67%	14.05	9.78%	5.37%
189	**Elm Wealth**	Philadelphia, Pa.	3,018.20	49.46%	4.61	10.21%	35.61%
190	**Chesley, Taft & Associates**	Chicago, Ill.	3,013.51	25.36%	4.75	-22.02%	60.76%
191	**Baltimore Washington Financial Advisors**	Columbia, Md.	2,985.58	25.92%	2.11	10.16%	14.31%
192	**Fairway Wealth Management**	Independence, Ohio	2,977.22	14.22%	9.22	3.61%	10.24%
193	**Retirement Income Solutions**	Ann Arbor, Mich.	2,972.36	11.88%	2.33	11.35%	0.47%
194	**SFMG Wealth Advisors**	Plano, Texas	2,956.97	17.12%	3.19	13.58%	3.12%
195	**SJS Investment Services**	Sylvania, Ohio	2,937.12	16.26%	2.78	9.65%	6.03%
196	**Foster & Motley**	Cincinnati, Ohio	2,936.50	15.73%	3.31	10.52%	4.72%
197	**Bedel Financial Consulting**	Indianapolis, Ind.	2,919.79	18.18%	3.23	13.60%	4.03%
198	**Berger Financial Group**	Plymouth, Minn.	2,900.00	16.00%	0.76	-8.42%	26.67%
199	**Regal Investment Advisors**	Kentwood, Mich.	2,877.30	17.58%	0.37	15.11%	2.15%
200	**Capstone Financial Advisors**	Downers Grove, Ill.	2,868.07	35.50%	4.25	30.68%	3.69%
201	**West Financial Services**	McLean, Va.	2,836.21	10.16%	2.94	5.02%	4.90%
202	**Manchester Capital Management**	Manchester, Vt.	2,832.80	-23.90%	12.11	-17.72%	-7.51%
203	**Angeles Wealth Management**	Santa Monica, Calif.	2,800.00	41.20%	13.40	9.45%	29.01%
204	**Diversified**	Wilmington, Del.	2,791.13	36.72%	1.40	17.93%	15.93%
205	**CFS Investment Advisory Services**	Totowa, N.J.	2,756.51	16.19%	4.71	14.20%	1.74%
206	**Arete Wealth Advisors**	Chicago, Ill.	2,745.38	-12.91%	0.51	-6.45%	-6.90%
207	**RTD Financial Advisors**	Philadelphia, Pa.	2,724.58	14.40%	3.25	2.80%	11.29%

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208	Duncan Williams Asset Management	Memphis, Tenn.	2,694.43	24.56%	1.20	9.20%	14.07%
209	NPF Investment Advisors	Grand Rapids, Mich.	2,691.11	6.57%	2.71	0.56%	5.98%
210	Main Street Research	Lakeville, Conn.	2,681.89	12.46%	2.60	4.17%	7.96%
211	Titleist Asset Management	San Antonio, Texas	2,655.19	34.06%	1.16	3.04%	30.11%
212	Osborne Partners Capital Management	San Francisco, Calif.	2,651.27	12.40%	3.61	11.94%	0.41%
213	Zemenick & Walker	St. Louis, Mo.	2,630.20	8.26%	9.71	2.27%	5.86%
214	Trajan Wealth	Scottsdale, Ariz.	2,601.79	32.09%	0.27	11.82%	18.13%
215	Icon Wealth Partners	Houston, Texas	2,577.33	14.33%	4.12	5.37%	8.51%
216	Glassman Wealth Services	Vienna, Va.	2,556.85	16.52%	7.10	10.37%	5.57%
217	Validus Capital	Los Angeles, Calif.	2,536.85	16.59%	16.69	34.99%	-13.64%
218	LVW Advisors	Pittsford, N.Y.	2,471.87	8.33%	4.67	5.05%	3.12%
219	FBB Capital Partners	Bethesda, Md.	2,464.24	14.01%	2.05	7.45%	6.10%
220	Guyasuta Investment Advisors	Pittsburgh, Pa.	2,437.46	6.75%	5.19	4.47%	2.17%
221	Tschetter Group	Bellevue, Wash.	2,432.38	15.04%	4.78	1.71%	13.11%
222	RZH Advisors	Stamford, Conn.	2,397.28	16.07%	5.32	10.15%	5.37%
223	IFC Advisors	Los Angeles, Calif.	2,344.17	0.31%	5.96	-45.63%	84.51%
224	Magnus Financial Group	New York City, N.Y.	2,326.11	19.54%	2.00	12.02%	6.71%
225	McKinley Carter Wealth Services	Wheeling, W.Va.	2,306.28	-8.94%	1.80	27.86%	-28.78%
226	Fidelis Capital ¶	Tampa, Fla.	2,284.45	37.59%	15.23	19.25%	15.38%
227	Moneco Advisors	Fairfield, Conn.	2,279.90	19.05%	0.59	6.47%	11.82%
228	Gateway Wealth Partners	Appleton, Wis.	2,278.84	82.34%	0.31	1.82%	79.08%
229	Traphagen Investment Advisors	Oradell, N.J.	2,278.12	20.01%	1.12	15.66%	3.77%
230	Beaird Harris Wealth Management	Dallas, Texas	2,267.74	18.89%	2.98	12.02%	6.14%
231	Sather Financial Group	Victoria, Texas	2,267.06	16.32%	4.65	16.32%	0.00%
232	California Financial Advisors	San Ramon, Calif.	2,263.38	13.07%	1.48	13.37%	-0.26%
233	Waterloo Capital	Austin, Texas	2,261.12	34.06%	0.81	0.08%	33.96%
234	Rather & Kittrell	Knoxville, Tenn.	2,252.30	51.05%	2.03	54.17%	-2.03%
235	Cornerstone Advisory	Hunt Valley, Md.	2,249.01	11.76%	2.63	8.62%	2.89%
236	Twelve Points Wealth Management	Concord, Mass.	2,243.86	31.87%	3.78	2.12%	29.13%
237	LBMC Investment Advisors	Brentwood, Tenn.	2,226.00	13.98%	4.32	9.33%	4.25%
238	Human Investing	Lake Oswego, Ore.	2,224.16	18.33%	1.65	-2.47%	21.33%
239	Wealthquest Corporation	Cincinnati, Ohio	2,223.23	15.05%	1.38	11.04%	3.61%
240	Condor Capital Wealth Management	Martinsville, N.J.	2,179.70	9.18%	2.48	2.97%	6.03%
241	PDS Planning	Dublin, Ohio	2,167.29	20.92%	3.53	19.54%	1.15%
242	Abacus Planning Group	Columbia, S.C.	2,155.81	13.52%	6.55	5.59%	7.52%
243	Van Hulzen Asset Management	El Dorado Hills, Calif.	2,143.35	15.24%	0.74	6.82%	7.89%
244	Pinnacle Advisors	Mansfield, Ohio	2,136.47	10.16%	2.00	3.13%	6.81%
245	Next Capital Management	New York, N.Y.	2,135.48	19.64%	9.71	8.76%	10.00%
246	Segment Wealth Management	Houston, Texas	2,069.23	17.77%	8.66	13.34%	3.91%
247	Cahaba Wealth Management	Atlanta, Ga.	2,060.89	25.57%	2.32	20.20%	4.47%
248	Keebeck Wealth Management	Chicago, Ill.	2,027.91	24.94%	13.52	-5.05%	31.58%
249	ProVise Management Group	Clearwater, Fla.	2,025.00	12.63%	1.56	10.29%	2.12%
250	Albion Financial Group	Salt Lake City, Utah	2,013.64	8.37%	2.73	10.87%	-2.25%
251	Woodmont Investment Counsel	Nashville, Tenn.	2,012.23	15.46%	4.30	10.77%	4.23%
252	Physician Wealth Advisors	Salt Lake City, Utah	2,006.59	16.00%	2.00	13.68%	2.04%
253	CapTrust Wealth Advisors	Holland, Mich.	2,002.87	6.00%	2.22	4.47%	1.46%
254	Harbor Group	Bedford, N.H.	1,996.34	15.10%	2.85	14.28%	0.72%
255	Wellesley Asset Management	Portsmouth, N.H.	1,995.29	-3.44%	1.53	9.62%	-11.91%
256	Diversified Portfolios	Bloomfield Hills, Mich.	1,935.60	16.54%	2.91	8.65%	7.26%
257	Conservest Capital Advisors	Wynnewood, Pa.	1,925.00	10.44%	6.35	5.70%	4.48%
258	DT Investment Partners	Chadds Ford, Pa.	1,912.85	1.32%	2.48	N/A	N/A
259	Clear Creek Financial Management	Silverdale, Wash.	1,909.36	29.50%	0.51	11.94%	15.69%

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260	Patriot Investment Management	Knoxville, Tenn.	1,906.86	13.04%	1.22	14.78%	-1.52%
261	Blue Chip Partners	Farmington Hills, Mich.	1,877.19	21.04%	1.90	9.04%	11.01%
262	Sovran Advisors	San Diego, Calif.	1,874.35	43.23%	0.62	133.94%	-38.78%
263	Austin Asset	Austin, Texas	1,871.76	12.33%	4.18	14.34%	-1.75%
264	Private Advisory	Lehi, Utah	1,860.46	39.96%	2.70	13.59%	23.21%
265	Azzad Asset Management	Falls Church, Va.	1,837.19	13.68%	1.19	11.84%	1.65%
266	Berman McAleer	Timonium, Md.	1,821.80	12.07%	6.05	6.12%	5.61%
267	Financial Synergies Wealth Advisors	Houston, Texas	1,811.30	15.64%	1.93	3.31%	11.93%
268	Versant Capital Management	Phoenix, Ariz.	1,810.75	46.14%	3.48	51.47%	-3.52%
269	Altfest Personal Wealth Management	New York, N.Y.	1,798.32	10.16%	2.90	4.83%	5.08%
270	TFC Financial Management	Boston, Mass.	1,780.83	15.82%	4.26	14.16%	1.46%
271	Willis Johnson Wealth	Houston, Texas	1,763.70	33.38%	3.09	18.17%	12.87%
272	R|W Investment Management	Eagle, Idaho	1,731.70	12.96%	3.06	15.36%	-2.08%
273	Catalyst Financial Partners	Boston, Mass.	1,722.30	68.54%	4.69	50.63%	11.89%
274	Rothschild Wealth Partners	Oak Brook, Ill.	1,697.51	N/A	0.59	N/A	19.32%
275	Petredis Investment Advisors	Warrendale, Pa.	1,686.98	20.10%	3.12	18.99%	0.93%
276	Lee Financial	Dallas, Texas	1,682.47	12.42%	3.79	9.38%	2.78%
277	Weatherly Asset Management	Del Mar, Calif.	1,677.95	14.18%	4.40	11.79%	2.14%
278	Patton Albertson Miller Group	Chattanooga, Tenn.	1,677.77	6.71%	2.54	1.38%	5.25%
279	Tom Johnson Investment Management	Oklahoma City, Okla.	1,632.59	0.23%	9.33	-8.36%	9.38%
280	Fortis Capital Advisors	Prairie Village, Kan.	1,615.58	33.28%	0.74	15.04%	15.85%
281	Financial Plan	Bellingham, Wash.	1,604.66	30.41%	1.58	23.86%	5.28%
282	Naviter Wealth	Little Rock, Ark.	1,601.90	3.08%	7.81	-8.99%	13.26%
283	Rollins Financial Advisors	Atlanta, Ga.	1,589.30	14.98%	1.61	14.63%	0.30%
284	Petersen Hastings Wealth Advisors	Kennewick, Wash.	1,576.83	23.37%	1.23	9.11%	13.07%
285	Brandywine Oak Private Wealth	Kenentt Square, Pa.	1,571.77	11.85%	3.21	9.11%	2.51%
286	Astra Wealth Management Group	Plano, Texas	1,567.81	20.33%	1.63	11.22%	8.19%
287	MJP Wealth Advisors	Farmington, Conn.	1,561.80	18.40%	1.83	15.22%	2.76%
288	Burton Enright Welch	Walnut Creek, Calif.	1,553.06	24.66%	2.48	18.28%	5.40%
289	Falcon Wealth Planning	Ontario, Calif.	1,552.68	33.91%	0.81	0.31%	33.50%
290	Pekin Hardy Strauss	Chicago, Ill.	1,551.74	35.63%	2.11	30.65%	3.81%
291	Regatta Capital Group	El Segundo, Calif.	1,551.65	13.38%	1.33	9.49%	3.56%
292	TritonPoint Wealth	Chevy Chase, Md.	1,549.52	0.43%	3.91	-11.23%	13.14%
293	Kings Path Partners	Sugar Land, Texas	1,528.74	21.50%	8.54	13.35%	7.19%
294	Allen Capital Group	Grand Island, Neb.	1,501.56	50.39%	0.66	41.01%	6.65%
295	Tower Bridge Advisors	West Conshohocken, Pa.	1,494.27	13.43%	3.83	7.90%	5.12%
296	Destiny Wealth Partners	Tavares, Fla.	1,493.26	30.57%	1.49	25.62%	3.94%
297	Retirement Investment Advisors	Oklahoma City, Okla.	1,489.75	17.46%	1.04	13.36%	3.62%
298	Archford	Swansea, Ill.	1,489.12	16.43%	1.94	7.02%	8.79%
299	Apriem Advisors	Irvine, Calif.	1,486.38	20.93%	1.39	9.09%	10.85%
300	HORAN Wealth	Cincinnati, Ohio	1,470.00	38.29%	1.02	14.89%	20.37%
301	Sargent Investment Group	Bethesda, Md.	1,466.79	20.15%	3.53	15.23%	4.27%
302	CJM Wealth Advisers	Falls Church, Va.	1,466.18	14.08%	1.68	11.74%	2.10%
303	Pinkerton Wealth	Coeur DAlene, Idaho	1,439.08	14.78%	1.14	4.77%	9.55%
304	Wingate Wealth Advisors	Lexington, Mass.	1,415.30	6.82%	2.64	6.62%	0.19%
305	Fiduciary Financial Advisors	Grand Rapids, Mich.	1,408.92	20.63%	0.70	46.89%	-17.88%
306	Claro Advisors	Boston, Mass.	1,407.66	9.63%	1.25	-2.47%	12.41%
307	Ellsworth Advisors	Hudson, Ohio	1,406.46	18.65%	0.49	14.41%	3.70%
308	Acorn Financial Advisory Services	Reston, Va.	1,398.64	13.29%	2.35	-6.13%	20.69%
309	JL Bainbridge & Co.	Sarasota, Fla.	1,371.16	14.13%	1.61	14.13%	0.00%
310	Next Level Private	Harrison, N.Y.	1,369.97	29.88%	1.69	6.95%	21.44%
311	Sheets Smith Wealth Management	Winston-Salem, N.C.	1,365.13	9.71%	3.23	6.59%	2.92%

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312	McIlrath & Eck	Arlington, Wash.	1,364.90	28.79%	1.06	9.49%	17.63%
313	Moisand Fitzgerald Tamayo	Orlando, Fla.	1,350.22	17.35%	1.49	14.12%	2.83%
314	Virtue Capital Management	Brentwood, Tenn.	1,310.52	8.45%	0.17	6.93%	1.42%
315	Biondo Investment Advisors	Milford, Pa.	1,292.59	16.83%	1.13	8.94%	7.24%
316	Stansberry Asset Mgmt. (now known as Meristead Wealth)	Westlake, Texas	1,291.27	23.09%	1.29	16.45%	5.70%
317	Chemistry Wealth Management	New York, N.Y.	1,264.27	22.33%	2.27	16.19%	5.28%
318	Ullmann Wealth Partners	Jacksonville Beach, Fla.	1,254.15	16.73%	2.34	0.58%	16.05%
319	Absher Wealth Management	Chapel Hill, N.C.	1,253.50	15.15%	3.13	15.15%	0.00%
320	Opal Wealth Advisors	Jericho, N.Y.	1,238.19	20.31%	1.70	8.61%	10.77%
321	Keen Wealth Advisors	Overland Park, Kan.	1,233.41	18.48%	1.19	7.64%	10.07%
322	HCM Wealth Advisors	Cincinnati, Ohio	1,230.58	13.52%	1.45	2.16%	11.11%
323	Arista Wealth Management	Las Vegas, Nev.	1,201.81	16.85%	2.33	-7.16%	25.85%
324	Frazier Financial Advisors	Columbus, Ohio	1,200.00	34.08%	2.00	22.91%	9.09%
325	Richard Young Advisors	Augusta, Ga.	1,195.34	22.93%	0.62	16.97%	5.09%
326	Tobias Financial Advisors	Plantation, Fla.	1,191.00	33.52%	3.10	21.70%	9.71%
327	DiNuzzo Private Wealth	Beaver, Pa.	1,177.33	16.23%	1.46	16.52%	-0.25%
328	Deerfield Financial Advisors	Indianapolis, Ind.	1,176.25	22.69%	3.55	-24.76%	63.05%
329	Brand Asset Management Group	Chesterfield, Mo.	1,174.40	26.23%	3.36	9.64%	15.13%
330	StraightLine Group	Troy, Mich.	1,170.38	5.76%	0.49	27.81%	-17.25%
331	Woodard & Company Asset Mgmt. Group	Bermuda Run, N.C.	1,167.00	12.32%	0.64	13.56%	-1.09%
332	Great Lakes Retirement	Sheffield Village, Ohio	1,163.78	20.89%	0.70	27.99%	-5.55%
333	Lake Street Private Wealth	Chicago, Ill.	1,158.68	20.47%	1.88	0.72%	19.61%
334	Alaska Wealth Advisors	Anchorage, Alaska	1,156.21	26.50%	1.72	18.22%	7.01%
335	Lucid Advisors	Seattle, Wash.	1,147.36	19.75%	34.77	12.49%	6.45%
336	Elser Financial Planning	Indianapolis, Ind.	1,134.11	16.71%	2.71	9.19%	6.89%
337	Aviance Capital Partners	Naples, Fla.	1,125.64	15.92%	3.03	13.43%	2.20%
338	Insight Wealth Partners	Plano, Texas	1,124.22	15.86%	1.13	9.11%	6.19%
339	Lynx Investment Advisory	Washington, D.C.	1,114.50	-14.53%	4.72	-11.63%	-3.28%
340	Arthur M. Cohen & Associates	Northbrook, Ill.	1,111.51	8.86%	5.88	-3.23%	12.50%
341	Stage Harbor Financial	Westwood, Mass.	1,097.17	12.77%	3.15	7.27%	5.14%
342	Sovereign Financial Group	Stamford, Conn.	1,082.55	22.64%	0.76	3.58%	18.40%
343	YeskeBuie	Vienna, Va.	1,069.35	15.49%	4.04	13.75%	1.53%
344	Fiduciary Benefits Group	San Diego, Calif.	1,065.82	26.37%	3.45	6.74%	18.39%
345	Insight Wealth Strategies	San Ramon, Calif.	1,063.98	14.17%	1.88	13.97%	0.18%
346	Schnieders Capital Mangement	Pasadena, Calif.	1,061.07	22.76%	3.87	34.41%	-8.67%
347	FORM Wealth Advisors	Lake Geneva, Wis.	1,055.57	13.22%	1.33	13.08%	0.13%
348	Armbruster Capital Management	Pittsford, N.Y.	1,055.07	17.13%	2.01	8.41%	8.04%
349	Southern Financial Group	Birmingham, Ala.	1,050.14	12.18%	0.92	10.12%	1.87%
350	MATAURO	New York, N.Y.	1,047.28	48.95%	1.19	36.73%	8.94%
351	Baker Ellis Asset Management	Vancouver, Wash.	1,047.12	19.78%	3.05	21.88%	-1.72%
352	Morling Financial Advisors	Fremont, Calif.	1,047.06	38.55%	2.88	37.41%	0.83%
353	Paragon Financial Advisors	College Station, Texas	1,045.00	15.93%	2.34	5.29%	10.10%
354	William Mack and Associates	Troy, Mich.	1,034.61	26.11%	1.09	29.82%	-2.86%
355	Walkner Condon Financial Advisors	Madison, Wis.	1,031.18	40.71%	1.29	14.33%	23.08%
356	Breakwater Capital Group	Paramus, N.J.	1,019.16	20.84%	2.75	-2.02%	23.33%
357	Verum Partners	Charlotte, N.C.	1,014.13	22.54%	2.50	11.04%	10.35%
358	Fermata Advisors	Sonoma, Calif.	1,009.55	-11.85%	0.48	-58.09%	110.31%
359	BlueSky Wealth Advisors §	New Bern, N.C.	1,004.50	18.20%	2.89	18.88%	-0.57%
360	CapSouth Wealth Management	Dothan, Ala.	1,001.27	13.22%	2.57	18.73%	-4.65%
ASSET CATEGORY: $500 MILLION TO < $1 BILLION							
361	Omnia Family Wealth	Aventura, Fla.	994.58	15.76%	6.14	15.76%	0.00%
362	MBE Wealth Management	Tomah, Wis.	977.10	34.69%	0.38	24.33%	8.33%

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FA's 2026 RIA RANKING

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363	**Avion Wealth**	The Woodlands, Texas	971.85	21.30%	3.84	14.58%	5.86%
364	**BentOak Capital**	Weatherford, Texas	969.77	20.67%	1.21	14.64%	5.26%
365	**Maridea Wealth Management**	Brooklyn, N.Y.	958.72	104.32%	0.96	2.16%	100.00%
366	**Legacy Financial Strategies**	Overland Park, Kan.	952.03	18.10%	1.37	16.58%	1.31%
367	**Blankinship & Foster**	Solana Beach, Calif.	939.51	8.97%	3.23	13.09%	-3.64%
368	**Frisch Financial Group**	Melville, N.Y.	931.56	17.97%	1.54	8.81%	8.42%
369	**Investmark Advisory Group**	Shelton, Conn.	929.67	14.46%	1.35	13.63%	0.73%
370	**RiversEdge Advisors**	Wilmington, Del.	928.30	31.04%	2.09	16.02%	12.94%
371	**Goodman Financial Corporation**	Houston, Texas	915.93	5.90%	3.18	6.26%	-0.35%
372	**StrategicPoint Investment Advisors**	Providence, R.I.	914.76	13.44%	1.30	12.64%	0.71%
373	**Rosemeyer Management Group**	Platteville, Wis.	913.96	31.98%	0.78	13.03%	16.77%
374	**Briaud Financial Advisors**	College Station, Texas	912.79	17.73%	3.27	17.31%	0.36%
375	**Covenant Wealth Advisors**	Richmond, Va.	909.64	39.30%	1.74	13.73%	22.48%
376	**MarsJewett Financial Group**	Bellevue, Wash.	901.42	22.70%	1.26	14.83%	6.86%
377	**Asset Management Group**	Stamford, Conn.	898.34	11.67%	3.36	11.25%	0.38%
378	**Christopher Weil & Company**	San Diego, Calif.	896.24	-1.89%	1.73	-0.19%	-1.70%
379	**3Chopt Investment Partners**	Richmond, Va.	889.37	20.33%	10.59	4.57%	15.07%
380	**Correct Capital Wealth Management**	Clayton, Mo.	889.35	-3.49%	1.91	-4.94%	1.53%
381	**Intelligence Driven Advisers**	Carlsbad, Calif.	881.93	-7.66%	1.00	-28.56%	29.26%
382	**OPTAS Capital**	Dripping Springs, Texas	881.91	18.96%	6.08	33.73%	-11.04%
383	**Leisure Capital Management**	Costa Mesa, Calif.	873.95	12.24%	2.55	5.04%	6.85%
384	**TMB Capital Partners ‡**	Little Rock, Ark.	867.85	N/A	1.90	N/A	N/A
385	**Level Financial Advisors**	East Amherst, N.Y.	862.66	20.71%	1.24	9.06%	10.69%
386	**Birchwood Financial Partners**	Bloomington, Minn.	853.20	14.29%	1.61	7.40%	6.41%
387	**Whitaker-Myers Wealth Managers**	Mansfield, Ohio	850.61	19.28%	0.26	14.62%	4.06%
388	**Net Worth Advisory Group**	Sandy, Utah	838.37	16.71%	0.97	7.77%	8.29%
389	**Global Financial Private Client**	Sarasota, Fla.	828.33	24.20%	6.63	14.27%	8.70%
390	**Asio Capital**	Lexington, Ky.	805.09	29.53%	2.78	20.60%	7.41%
391	**Carolina Wealth Management**	Greenville, N.C.	798.46	12.17%	1.23	3.16%	8.74%
392	**JVL Wealth Strategies**	Wyoming, Mich.	784.41	16.65%	4.19	7.92%	8.09%
393	**Bellwether Wealth**	Lincoln, Neb.	784.02	51.94%	1.56	34.72%	12.78%
394	**Centurion Wealth Management**	McLean, Va.	784.01	32.56%	1.78	46.12%	-9.28%
395	**Factor Wealth Management**	Chicago, Ill.	781.02	23.95%	3.27	15.13%	7.66%
396	**FMB Wealth Management**	Westlake Village, Calif.	775.00	18.32%	2.39	6.63%	10.96%
397	**Wilsey Asset Management**	San Diego, Calif.	768.47	23.71%	0.86	18.30%	4.58%
398	**Hopwood Financial Services**	Reston, Va.	750.26	12.56%	2.65	8.58%	3.66%
399	**Porter White Investment Advisors**	Birmingham, Ala.	748.21	5.07%	6.56	9.68%	-4.20%
400	**Financial Insights Wealth Management**	Tacoma, Wash.	746.75	12.68%	0.89	4.49%	7.84%
401	**Sensible Money**	Scottsdale, Ariz.	742.53	23.00%	2.50	14.72%	7.22%
402	**Gradient Capital Advisors**	San Diego, Calif.	742.20	16.42%	1.59	15.18%	1.08%
403	**ARQ Wealth Advisors**	Scottsdale, Ariz.	738.86	45.94%	1.50	9.75%	32.97%
404	**The Marshall Financial Group**	Hunt Valley, Md.	735.57	24.03%	0.76	13.57%	9.21%
405	**Financial Management Strategies**	Braodview Hts., Ohio	714.24	15.29%	0.38	8.05%	6.70%
406	**Manske Wealth Management**	Houston, Texas	707.32	16.24%	1.41	10.92%	4.80%
407	**NorthCape Wealth Management**	Williamsville, N.Y.	706.08	14.90%	1.11	12.72%	1.93%
408	**Solidarity Wealth**	Lehi, Utah	704.16	12.15%	3.22	0.38%	11.73%
409	**Grey Fox Wealth Advisors**	Rockland, Del.	698.76	28.42%	2.09	5.80%	21.38%
410	**Marotta Wealth Management**	Charlottesville, Va.	686.04	13.61%	1.87	14.85%	-1.08%
411	**Precedent Wealth Partners**	Houston, Texas	685.05	27.91%	2.98	5.66%	21.05%
412	**Sandbox Financial Partners**	Bethesda, Md.	681.67	18.52%	1.29	11.81%	6.00%
413	**von Borstel & Associates**	The Dalles, Ore.	680.19	18.02%	1.35	2.36%	15.30%
414	**Alteri Wealth**	Westlake Village, Calif.	676.29	-12.31%	2.05	-20.29%	10.00%

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415	**Boston Research & Management**	Manchester-by-the-Sea, Mass.	676.19	16.17%	5.45	15.23%	0.81%
416	**Trinity Financial Advisors**	Columbus, Ohio	669.99	15.43%	3.22	12.10%	2.97%
417	**Stone Temple Partners**	New York, N.Y.	668.60	33.72%	83.58	-16.43%	60.00%
418	**Three Arch Wealth Management ‡**	Irvine, Calif.	662.44	N/A	2.54	N/A	N/A
419	**Bare Wealth Advisors**	Gap, Pa.	662.26	30.03%	0.79	9.00%	19.29%
420	**Aspen Wealth Management**	Fort Worth, Texas	657.83	29.09%	1.90	22.38%	5.49%
421	**Optima Asset Management**	Dallas, Texas	657.41	8.28%	5.34	7.40%	0.82%
422	**Family Office Research**	Bethesda, Md.	648.21	12.12%	4.87	0.32%	11.76%
423	**Granite Harbor Advisors**	Houston, Texas	642.14	17.19%	1.48	8.84%	7.67%
424	**Peregrine Asset Advisers**	Portland, Ore.	636.00	9.47%	1.27	5.09%	4.17%
425	**Fire Capital Management**	San Francisco, Calif.	635.45	N/A	20.50	N/A	N/A
426	**WJ Interests**	Sugar Land, Texas	634.00	14.65%	2.76	13.15%	1.32%
427	**Stenger Family Office**	Naperville, Ill.	628.13	59.73%	0.75	15.05%	38.83%
428	**GEM Asset Management**	Plymouth, Mich.	628.06	18.41%	1.28	14.79%	3.16%
429	**B&C Financial Advisors**	Ponte Vedra Beach, Fla.	626.01	14.61%	1.15	9.54%	4.62%
430	**FCA Corp**	Houston, Texas	623.12	18.53%	3.54	20.55%	-1.68%
431	**Hapanowicz Financial**	Pittsburgh, Pa.	622.32	25.10%	1.08	20.75%	3.60%
432	**Alpha Financial Advisors**	Charlotte, N.C.	619.32	23.01%	2.36	20.19%	2.34%
433	**Financial Alternatives**	La Jolla, Calif.	614.78	12.23%	2.29	12.23%	0.00%
434	**Keeler & Nadler Family Wealth**	Dublin, Ohio	609.90	27.65%	1.18	13.35%	12.61%
435	**Treehouse Wealth Advisors**	Walnut Creek, Calif.	597.06	11.18%	2.06	4.67%	6.23%
436	**Financial Gravity Family Office Services**	Austin, Texas	590.46	26.38%	0.37	-13.11%	45.45%
437	**Pathview Wealth Advisors**	San Diego, Calif.	582.97	0.58%	1.58	-31.40%	46.61%
438	**O'Keefe Stevens Advisory**	Rochester, N.Y.	581.54	36.60%	1.92	30.28%	4.84%
439	**Jackson Square Capital**	San Francisco, Calif.	564.29	15.44%	4.15	9.50%	5.43%
440	**Brooklyn Fi**	Brooklyn, N.Y.	563.10	65.13%	1.17	30.73%	26.32%
441	**StrongBox Wealth**	Lee's Summit, Mo.	562.44	23.20%	1.13	13.08%	8.95%
442	**Empirical Asset Management #**	Wellesley, Mass.	559.57	19.82%	1.18	0.90%	18.75%
443	**QP Consulting**	Takoma Park, Md.	559.06	12.57%	7.66	7.95%	4.29%
444	**SGH Wealth Management**	Lathrup Village, Mich.	558.49	25.23%	1.24	11.31%	12.50%
445	**HT Partners**	Centerbrook, Conn.	556.33	10.51%	4.06	N/A	N/A
446	**Absolute Capital Management**	Pittsburgh, Pa.	553.95	27.64%	0.31	9.92%	16.13%
447	**Asset Planning**	Los Alamitos, Calif.	553.46	9.37%	1.48	6.45%	2.75%
448	**Miramar Capital**	Northbrook, Ill.	550.25	8.05%	3.67	8.77%	-0.66%
449	**Andrews, Lucia Wealth Management**	Danville, Calif.	543.49	9.40%	2.77	6.05%	3.16%
450	**ShoreHaven Wealth Partners**	Red Bank, N.J.	541.51	21.60%	1.37	14.23%	6.45%
451	**Meritas Wealth Management**	San Rafael, Calif.	533.82	10.33%	2.35	11.30%	-0.87%
452	**Pension & Wealth Management Advisors**	Waltham, Mass.	529.81	17.16%	0.84	5.39%	11.17%
453	**Searcy Financial Services**	Overland Park, Kan.	513.97	14.81%	2.94	24.65%	-7.89%
454	**Client 1st Advisory Group**	Dunedin, Fla.	511.49	26.62%	1.46	19.38%	6.06%
455	**Fidato Wealth**	Middleburg Heights, Ohio	510.75	25.64%	1.69	13.20%	10.99%
456	**Horizon Financial**	West Henrietta, N.Y.	510.21	11.95%	0.70	10.12%	1.66%
457	**Monument Wealth Management**	Alexandria, Va.	508.80	13.26%	2.34	11.17%	1.88%
458	**Zuraw Financial Advisors**	Greensboro, N.C.	504.39	13.55%	3.08	10.09%	3.14%
459	**Ducere Wealth Management ‡, §**	Northbrook, Calif.	503.79	N/A	4.50	N/A	N/A
ASSET CATEGORY: $250 MILLION TO < $500 MILLION							
460	**Samalin Wealth**	Chappaqua, N.Y.	490.54	16.63%	0.91	14.03%	2.28%
461	**Hixon Zuercher Capital Management**	Findlay, Ohio	487.71	18.34%	1.25	7.72%	9.86%
462	**MBM Wealth Consultants**	Chesterfield, Mo.	477.00	0.07%	0.75	-6.18%	6.67%
463	**Brown Financial Advisory**	Fairhope, Ala.	468.22	36.10%	1.68	14.56%	18.80%
464	**Steadmont Advisors**	Birmingham, Ala.	430.74	16.91%	1.38	12.05%	4.33%
465	**Integrated Capital Management**	Bloomfield Hills, Mich.	429.76	16.90%	1.01	14.97%	1.67%
466	**McCarthy Asset Management**	Redwood Shores, Calif.	422.40	11.79%	1.91	11.79%	0.00%

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2025 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2025 ASSETS ($MM)	% GROWTH IN ASSETS (2024-2025)	ASSETS PER CLIENT ($MM)*	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
467	Everest Private Wealth	Cupertino, Calif.	410.80	33.83%	4.56	21.93%	9.76%
468	Ballast Rock Private Wealth	Charleston, S.C.	405.74	70.33%	1.62	28.94%	32.11%
469	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	398.37	17.01%	2.25	13.05%	3.51%
470	Legacy Consulting Group	Plano, Texas	378.65	6.24%	2.37	6.90%	-0.62%
471	Advisor Share Wealth Management	Vancouver, Wash.	376.94	103.55%	0.32	67.82%	21.29%
472	Baron Financial Group	Fair Lawn, N.J.	369.11	8.55%	1.11	2.38%	6.03%
473	Tull Financial Group	Chesapeake, Va.	367.09	17.78%	1.24	20.17%	-1.99%
474	Canter Wealth §	La Jolla, Calif.	366.54	35.46%	1.33	31.52%	3.00%
475	Momentous Wealth Management	Vancouver, Wash.	356.04	13.54%	0.78	4.56%	8.59%
476	Foresight Capital Management Advisors	Saline, Mich.	351.10	13.24%	0.60	7.04%	5.79%
477	Premia Global Advisors	Coral Gables, Fla.	340.82	13.72%	7.10	8.98%	4.35%
478	Powers Advisory Group	Highland, Ill.	329.50	31.32%	0.56	21.12%	8.42%
479	DAI Advisors	Menlo Park, Calif.	329.25	39.61%	1.16	23.83%	12.75%
480	Centerline Wealth Advisors	Louisville, Ky.	326.04	11.17%	1.19	10.36%	0.74%
481	Johnson Wealth Management	Grand Forks, N.D.	323.37	25.88%	1.83	13.08%	11.32%
482	Life Planning Partners	Jacksonville, Fla.	311.97	-11.88%	2.81	-7.92%	-4.31%
483	Kotys Wealth Professionals	Valapraiso, Ind.	308.02	13.18%	0.95	11.79%	1.25%
484	Gold Medal Waters ‡‡	Boulder, Colo.	285.64	15.11%	1.94	15.11%	0.00%
485	Pearson Creek Capital Management	Chicago, Ill.	284.81	15.31%	12.95	20.55%	-4.35%
486	Financial Futures	Brielle, N.J.	270.00	24.42%	1.93	6.65%	16.67%
487	Byrne Asset Management	Kingston, N.J.	268.84	24.32%	1.62	21.33%	2.47%
488	Birch Financial Group	Keene, N.H.	264.69	24.90%	1.39	-37.55%	100.00%
489	Center For Asset Management	Palm Beach Gardens, Fla.	257.14	12.25%	1.09	9.39%	2.61%
ASSET CATEGORY: $150 MILLION TO < $250 MILLION							
490	Atwater Wealth Management	Boston, Mass.	248.23	11.82%	2.53	14.11%	-2.00%
491	Smith Bruer	Tallahassee, Fla.	238.48	20.31%	1.06	38.94%	-13.41%
492	Capital Financial Group	Littleton, Colo.	237.37	15.95%	1.00	16.92%	-0.83%
493	Westview Investment Advisors	Burlington, Vt.	228.65	16.20%	1.40	13.35%	2.52%
494	Beacon Financial Advisors	Rye Brook, N.Y.	228.01	14.25%	4.65	18.91%	-3.92%
495	Professional Financial Strategies	Pittsford, N.Y.	225.81	9.71%	2.24	10.79%	-0.98%
496	Purtill Financial	Highland Heights, Ohio	207.05	8.74%	1.27	14.74%	-5.23%
497	Flagship Capital Management	Media, Pa.	198.00	13.14%	1.41	9.10%	3.70%
498	D.M. Brenner	Solana Beach, Calif.	193.62	9.97%	1.55	9.09%	0.81%
499	Ivy League Financial Advisors	Rockville, Md.	188.67	24.92%	1.83	16.43%	7.29%
500	Financial Consultants Group	Cumming, Ga.	188.17	34.52%	0.77	23.54%	8.89%
501	Roxbury Financial	Mount Arlington, N.J.	180.47	27.50%	0.76	18.43%	7.66%
502	SageOak Financial	Tulsa, Okla.	174.82	21.46%	0.65	20.11%	1.12%
503	Steward Advisors	Chicago, Ill.	160.74	17.44%	1.47	10.98%	5.83%
504	Wise Wealth Partners	Phoenix, Ark.	153.45	21.18%	2.26	1.58%	19.30%
505	Paragon Wealth Management	Provo, Utah	153.42	-2.19%	0.83	-9.63%	8.24%
ASSET CATEGORY: < $150 MILLION							
506	Ankerstar Wealth	Leander, Texas	148.50	35.10%	0.50	10.91%	21.81%
507	Sierra Financial Advisory	Nevada City, Calif.	144.93	14.84%	0.85	11.47%	3.03%
508	MTR Financial Services	Kingwood, Texas	119.93	22.70%	1.03	5.78%	16.00%
509	Oak Summit Wealth Management	San Diego, Calif.	82.01	22.86%	0.90	13.41%	8.33%
510	Graf Financial	Baton Rouge, La.	80.28	1.73%	1.06	0.39%	1.33%
511	Venn Wealth & Benefit Services	Altoona, Pa.	32.32	4.49%	0.25	4.49%	0.00%
512	Strada Wealth Management	Austin, Calif.	30.86	46.66%	0.37	37.93%	6.33%
513	Aurora Strategic Advisors	Lumberton, N.C.	30.60	43.66%	0.09	22.79%	17.00%
514	Safe Harbor Asset Management	Huntington, N.Y.	26.81	-20.61%	0.99	-20.61%	0.00%
515	Old Oak Advisors	Vestavia Hills, Ala.	24.77	51.55%	0.39	23.13%	23.08%
516	Birch Investment Management	Brookings, S.D.	23.28	16.13%	0.50	11.18%	4.44%

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FA's 2026 RIA Discretionary & Non-Discretionary AUM Ranking

2025 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2025 ($MM)	NON-DISCRETIONARY ASSETS 2025 ($MM)	YEAR END 2025 ASSETS ($MM)
ASSET CATEGORY: 1 BILLION AND OVER					
1	**CAPTRUST**	Raleigh, N.C.	320,175.96	916,528.89	1,236,704.85
2	**Edelman Financial Engines**	Boston, Mass.	326,285.24	0.00	326,285.24
3	**Creative Planning**	Overland Park, Kan.	291,931.22	3,637.38	295,568.60
4	**Hightower Advisors**	Chicago, Ill.	187,612.32	8,172.90	195,785.22
5	**Focus Partners Wealth**	St. Louis, Mo.	148,238.00	33,624.00	181,862.00
6	**Cerity Partners**	New York, N.Y.	145,720.00	15,960.00	161,680.00
7	**Wealth Enhancement Advisory Services**	Plymouth, Minn.	94,312.08	27,874.64	122,186.73
8	**Pathstone**	Englewood, N.J.	65,580.32	44,715.56	110,295.87
9	**Fiducient Advisors**	Chicago, Ill.	52,462.19	45,079.34	97,541.53
10	**Mercer Advisors**	Denver, Colo.	82,916.24	1,480.65	84,396.89
11	**Cresset**	Chicago, Ill.	77,154.21	1,782.05	78,936.26
12	**MAI Capital Management**	Cleveland, Ohio	49,271.53	19,301.60	68,573.13
13	**CIBC Private Wealth Advisors**	Atlanta, Ga.	64,416.93	3,423.35	67,840.28
14	**Beacon Pointe Advisors**	Newport Beach, Calif.	50,539.42	4,333.11	54,872.53
15	**Moneta**	St. Louis, Mo.	42,555.84	7,980.35	50,536.19
16	**Lido Advisors**	Los Angeles, Calif.	41,388.15	1,116.82	42,504.97
17	**Kayne Anderson Rudnick Investment Mgmt.**	Los Angeles, Calif.	39,356.57	0.00	39,356.57
18	**Savant Wealth Management**	Rockford, Ill.	38,020.93	107.53	38,128.45
19	**First Manhattan Co.**	New York, N.Y.	35,663.14	2,422.97	38,086.10
20	**BBR Partners**	New York, N.Y.	34,303.00	2,190.20	36,493.20
21	**Wealthspire**	New York, N.Y.	33,046.51	1,276.46	34,322.98
22	**Clearstead Advisors**	Cleveland, Ohio	25,942.90	7,937.13	33,880.03
23	**Allworth Financial**	Folsom, Calif.	33,064.57	489.44	33,554.01
24	**Steward Partners**	Stamford, Conn.	25,161.25	8,354.40	33,515.65
25	**HB Wealth**	Atlanta, Ga.	26,911.92	3,246.49	30,158.40
26	**Waverly Advisors**	Birmingham, Ala.	25,130.71	4,650.36	29,781.07
27	**Silvercrest Asset Management Group**	New York, N.Y.	23,840.48	4,487.51	28,327.99
28	**The Baldwin Group Wealth Advisors**	Tampa, Fla.	3,101.62	24,174.59	27,276.20
29	**AlTi Tiedemann Global**	New York, N.Y.	21,957.84	4,559.04	26,516.88
30	**Summit Rock Advisors**	New York, N.Y.	15,289.94	10,886.22	26,176.16
31	**1919 Investment Counsel**	Baltimore, Md.	25,942.16	94.01	26,036.17
32	**United Capital Financial Advisors**	Irving, Texas	22,498.75	2,148.01	24,646.77
33	**Oxford Financial Group**	Carmel, Ind.	11,539.69	11,791.16	23,330.85
34	**Johnson Investment Counsel**	Cincinnati, Ohio	22,764.23	220.73	22,984.97
35	**RWA Wealth Partners**	Boston, Mass.	19,400.57	394.71	19,795.29
36	**Choreo**	Rockford, Ill.	17,052.64	2,086.11	19,138.75
37	**Modera Wealth Management**	Westwood, N.J.	16,896.05	782.16	17,678.21
38	**Mason Investment Advisory Services**	Reston, Va.	14,597.67	1,073.76	15,671.43
39	**Evercore Wealth Management**	New York, N.Y.	15,424.88	91.02	15,515.91
40	**Investment Research & Advisory Group**	Atlanta, Ga.	1,055.08	14,361.66	15,416.74
41	**Ballentine Partners**	Waltham, Mass.	11,230.78	4,083.55	15,314.33
42	**CW Advisors**	Boston, Mass.	14,786.80	437.72	15,224.53
43	**CV Advisors**	Aventura, Fla.	1,832.13	13,251.54	15,083.67
44	**Freestone Capital Management**	Seattle, Wash.	9,968.89	4,571.93	14,540.83
45	**CLA Wealth Advisors**	Minneapolis, Minn.	8,724.14	5,702.50	14,426.64
46	**Coldstream**	Bellevue, Wash.	13,623.77	301.47	13,925.24
47	**Mission Wealth Management**	Santa Barbara, Calif.	10,557.72	3,354.41	13,912.13

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RIA Discretionary & Non-Discretionary AUM Ranking

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48	Gresham Partners	Chicago, Ill.	8,417.80	5,384.73	13,802.53
49	The Mather Group	Chicago, Ill.	12,590.50	855.89	13,446.39
50	Valeo Financial Advisors	Carmel, Ind.	10,667.99	2,290.68	12,958.68
51	Brookstone Capital Management	Wheaton, Ill.	12,750.13	0.00	12,750.13
52	Caprock	Boise, Idaho	12,241.63	237.44	12,479.07
53	Williams Jones Wealth Management	New York, N.Y.	12,419.93	54.62	12,474.55
54	LNW	Seattle, Wash.	11,683.94	499.84	12,183.78
55	Curi Capital	Chicago, Ill.	9,298.26	2,284.35	11,582.60
56	Heck Capital Advisors	Rhinelander, Wis.	5,027.85	6,283.87	11,311.72
57	Arax Advisory Partners	Denver, Colo.	10,881.16	422.87	11,304.03
58	Perigon Wealth Management	San Francisco, Calif.	8,997.11	2,296.91	11,294.01
59	Pure Financial Advisors	San Diego, Calif.	10,850.61	203.45	11,054.06
60	Ferguson Wellman Capital Management	Portland, Ore.	10,664.66	0.00	10,664.66
61	Shuster Advisory Group	Pasadena, Calif.	10,191.41	127.09	10,318.50
62	Bartlett Wealth Management	Cincinnati Ohio	10,192.88	60.18	10,253.06
63	Cary Street Partners Financial	Richmond Va.	6,946.07	3,306.20	10,252.26
64	Callan Family Office	Radnor Pa.	9,193.15	1,015.68	10,208.82
65	Conrad Siegel Investment Advisors	Harrisburg, Pa.	3,438.10	6,680.49	10,118.59
66	Foundations Investment Advisors	Phoenix, Ariz.	10,097.72	0.00	10,097.72
67	Choate Investment Advisors	Boston, Mass.	9,271.06	776.86	10,047.92
68	Welch & Forbes	Boston, Mass.	9,660.61	242.85	9,903.46
69	F.L.Putnam Investment Management Company	Lynnfield, Mass.	9,639.73	75.70	9,715.43
70	SignatureFD	Atlanta, Ga.	8,954.19	721.70	9,675.89
71	Cornerstone Advisors Asset Management	Bethlehem, Pa.	4,981.24	4,590.53	9,571.77
72	Advisors Capital Management	Ridgewood, N.J.	9,470.06	0.00	9,470.06
73	Joel Isaacson & Co.	New York, N.Y.	7,378.10	1,945.48	9,323.58
74	Tolleson Wealth Management	Dallas, Texas	9,105.00	153.00	9,258.00
75	Procyon	Shelton, Conn.	3,544.29	5,659.98	9,204.27
76	Bradley, Foster & Sargent	Hartford, Conn.	9,068.96	3.98	9,072.94
77	AlphaCore Wealth Advisory	La Jolla, Calif.	8,437.37	591.25	9,028.61
78	Simon Quick Advisors	Morristown, N.J.	8,357.44	649.38	9,006.81
79	Axxcess Wealth Management	Carlsbad, Calif.	8,794.98	83.82	8,878.80
80	Robertson Stephens Wealth Management	San Francisco, Calif.	6,992.88	1,771.09	8,763.97
81	Forum Financial Management	Lombard, Ill.	8,690.72	0.00	8,690.72
82	SageSpring Wealth Partners	Franklin, Tenn.	8,486.11	0.00	8,486.11
83	Empirical Wealth Management	Seattle, Wash.	8,425.77	3.20	8,428.97
84	Plancorp Wealth Management	St. Louis, Mo.	7,386.28	1,013.45	8,399.73
85	Zhang Financial	Portage, Mich.	5,605.57	2,764.60	8,370.16
86	OpenArc Corporate Advisory	Atlanta, Ga.	8,100.00	0.00	8,100.00
87	Annex Wealth Management	Brookfield, Wis.	7,810.54	239.49	8,050.02
88	Crestwood Advisors	Boston, Mass.	8,000.01	21.44	8,021.46
89	HBKS Wealth Advisors	Erie, Pa.	7,319.06	489.92	7,808.98
90	OneSeven	Beachwood, Ohio	7,676.86	40.91	7,717.77
91	Ingalls & Snyder	New York, N.Y.	7,548.16	167.13	7,715.29
92	Carnegie Investment Counsel	Pepper Pike, Ohio	6,781.23	731.96	7,513.19
93	Ashton Thomas Private Wealth	Scottsdale, Ariz.	6,078.00	1,359.00	7,437.00
94	Badgley Phelps Wealth Managers	Seattle, Wash.	6,900.75	380.02	7,280.76
95	Cassaday & Company	Mclean, Va.	7,138.78	0.00	7,138.78

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RIA Discretionary & Non-Discretionary AUM Ranking

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96	Northside Capital Management	Hood River, Ore.	2,089.29	4,852.91	6,942.21
97	Confluence Financial Partners	McMurray, Pa.	6,512.74	323.27	6,836.02
98	Greenspring Advisors	Towson, Md.	6,453.47	10.91	6,464.38
99	Elevation Point	Denver, Colo.	5,538.24	762.19	6,300.43
100	Grimes & Company	Westborough, Mass.	6,122.96	175.80	6,298.76
101	Kovack Advisors	Fort Lauderdale, Fla.	5,124.38	1,155.28	6,279.66
102	Westmount Partners	Los Angeles, Calif.	5,901.65	36.49	5,938.14
103	Index Fund Advisors	Irvine, Calif.	5,929.71	0.00	5,929.71
104	Mayflower Advisors	Boston, Mass.	1,774.02	4,041.56	5,815.58
105	SYM Financial Advisors	Winona Lake, Ind.	5,138.20	675.03	5,813.23
106	Bailard	Foster City, Calif.	5,790.63	15.50	5,806.13
107	Klingman & Associates	New York, N.Y.	4,136.39	1,528.30	5,664.69
108	TFO Wealth Partners	Maumee, Ohio	5,615.76	45.13	5,660.89
109	Allegheny Financial Group	Pittsburgh, Pa.	5,472.95	120.64	5,593.59
110	Crescent Grove Advisors	Lake Forest, Ill.	5,458.71	45.38	5,504.09
111	Larson Financial Group	St. Louis, Mo.	4,842.39	639.45	5,481.84
112	True North Advisors	Dallas, Texas	5,020.43	402.22	5,422.65
113	Constellation Wealth Advisors	Cincinnati, Ohio	5,347.90	52.15	5,400.05
114	TCI Wealth Advisors	Tucson, Ariz.	5,345.60	22.46	5,368.06
115	Alesco Advisors, an ESL Company	Pittsford, N.Y.	5,348.82	0.00	5,348.82
116	Stockman Wealth Management	Billings, Mont.	1,753.20	3,482.79	5,236.00
117	GenTrust	Miami, Fla.	3,875.24	1,326.83	5,202.07
118	Moran Wealth Management	Naples, Fla.	3,937.77	1,158.05	5,095.82
119	BakerAvenue Wealth Management	San Francisco, Calif.	4,819.18	226.86	5,046.04
120	TFO Family Office Partners	Phoenix, Ariz.	5,013.43	23.62	5,037.05
121	Coastal Bridge Advisors	Westport, Conn.	4,805.42	215.46	5,020.88
122	Advance Capital Management	Southfield, Mich.	4,904.62	76.22	4,980.84
123	Hamilton Capital	Columbus, Ohio	4,853.90	83.54	4,937.44
124	Compound Planning	New York, N.Y.	4,848.63	0.00	4,848.63
125	Chicago Capital	Chicago, Ill.	4,814.87	8.46	4,823.33
126	Sowell Management	North Little Rock, Ark.	4,737.86	70.30	4,808.16
127	Mainstay Capital Management	Grand Blanc, Mich.	4,187.83	614.55	4,802.38
128	Foster Group	West Des Moines, Iowa	4,604.71	170.81	4,775.51
129	IFG Advisory	Atlanta, Ga.	4,485.58	273.60	4,759.19
130	JFS Wealth Advisors	Hermitage, Pa.	4,207.66	521.41	4,729.07
131	Klingenstein Fields Advisors	New York, N.Y.	3,967.04	731.79	4,698.83
132	MCF Advisors	Lexington, Ky.	3,465.33	1,219.20	4,684.53
133	Bragg Financial Advisors	Charlotte, N.C.	4,671.12	0.00	4,671.12
134	Baker Tilly Wealth Management	Madison, Wis.	2,202.67	2,398.57	4,601.24
135	Capital Wealth Advisors	Naples, Fla.	4,270.73	243.74	4,514.47
136	Clifford Swan Investment Counselors	Pasadena, Calif.	3,925.00	557.00	4,482.00
137	Connecticut Wealth Management	Farmington, Conn.	4,403.15	74.46	4,477.61
138	Credent Wealth Management	Auburn, Ind.	4,464.69	0.00	4,464.69
139	Accredited Investors Wealth Management	Edina, Minn.	4,026.54	386.35	4,412.89
140	Prosperity Capital Advisors	Westlake, Ohio	4,362.22	0.00	4,362.22
141	Sage Financial Group	Conshohocken, Pa.	3,905.55	386.29	4,291.84
142	Quotient Wealth Partners	Dallas, Texas	4,257.50	31.66	4,289.16
143	Reynders McVeigh	Boston, Mass.	4,087.89	139.95	4,227.84

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RIA Discretionary & Non-Discretionary AUM Ranking

2025 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2025 ($MM)	NON-DISCRETIONARY ASSETS 2025 ($MM)	YEAR END 2025 ASSETS ($MM)
144	Halbert Hargrove Global Advisors	Long Beach, Calif.	4,166.22	37.69	4,203.91
145	Essex Financial	Essex, Conn.	3,247.33	922.65	4,169.98
146	Wescott Financial Advisory Group	Philadelphia, Pa.	3,181.90	973.89	4,155.79
147	Aprio Wealth Management	Atlanta, Ga.	4,154.84	0.00	4,154.84
148	SteelPeak Wealth	Woodland Hills, Calif.	4,101.10	46.98	4,148.08
149	Finaccess Advisors	Miami, Fla.	593.17	3,520.42	4,113.58
150	Gerber Kawasaki Wealth and Investment Mgmt.	Santa Monica, Calif.	3,943.37	166.24	4,109.61
151	Performance Wealth	Hinsdale, Ill.	4,063.05	29.60	4,092.64
152	PermCap Investment Office	Charleston, S.C.	1,797.97	2,219.57	4,017.55
153	Team Hewins	Foster City, Calif.	1,989.51	1,976.56	3,966.07
154	Inspire Investing	Meridian, Idaho	3,962.23	0.00	3,962.23
155	Wealthcare Capital Management	Richmond, Va.	3,891.79	36.86	3,928.65
156	Palisade Capital Management	Fort Lee, N.J.	3,859.66	2.84	3,862.50
157	Henssler Financial	Kennesaw, Ga.	3,115.79	698.68	3,814.46
158	Matter Family Office	St Louis, Mo.	599.75	3,211.30	3,811.05
159	Kingswood Wealth Advisors	San Diego, Calif.	3,494.28	306.46	3,800.73
160	FAS Wealth Partners	Leawood, Kan.	3,768.89	7.12	3,776.01
161	Howland Capital	Boston, Mass.	3,739.99	0.00	3,739.99
162	The Welch Group	Mountain Brook, Ala.	3,682.45	0.00	3,682.45
163	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	3,553.89	115.87	3,669.76
164	Sax Wealth Advisors	Parsippany, N.J.	3,485.54	110.54	3,596.08
165	Burney Company	Reston, Va.	3,456.59	132.07	3,588.66
166	Abacus Wealth Partners	Santa Monica, Calif.	3,570.94	8.30	3,579.24
167	Visionary Wealth Advisors	O'Fallon, Ill.	3,503.00	36.00	3,539.00
168	Greenwich Wealth Management	Greenwich, Conn.	2,884.24	634.37	3,518.61
169	Morton Wealth	Calabasas, Calif.	3,429.06	36.59	3,465.65
170	Donaldson Capital Management	Evansville, Ind.	3,449.53	14.77	3,464.30
171	Wedmont Private Capital	West Chester, Pa.	3,426.60	14.11	3,440.71
172	Colter Lewis Investment Partners	Greenwich, Conn.	723.98	2,687.58	3,411.56
173	Summitry	Foster City, Calif.	3,350.23	0.23	3,350.46
174	Schneider Downs Wealth Mgmt. Advisors	Pittsburgh, Pa.	2,099.81	1,205.97	3,305.79
175	Certuity	North Palm Beach, Fla.	2,244.12	1,057.50	3,301.61
176	BLBB Advisors	Montgomeryville, Pa.	3,207.35	48.05	3,255.40
177	Vista Capital Partners	Portland, Ore.	3,220.70	0.00	3,220.70
178	Principle Wealth	Madison, Conn.	3,204.65	0.00	3,204.65
179	Bogart Wealth	McLean, Va.	2,510.63	679.90	3,190.53
180	Lutz Financial	Omaha, Neb.	2,834.74	352.45	3,187.19
181	Winthrop Wealth	Boston, Mass.	3,074.49	26.87	3,101.36
182	Red Door Wealth Management	Memphis, Tenn.	2,110.64	975.05	3,085.70
183	1900 Wealth Management	San Antonio, Texas	3,071.00	0.00	3,071.00
184	GHP Investment Advisors	Denver, Colo.	2,985.74	77.89	3,063.63
185	Certified Advisory Corp	Altamonte Springs, Fla.	3,044.54	0.00	3,044.54
186	Obermeyer Wealth Partners	Aspen, Colo.	3,034.11	0.00	3,034.11
187	Pittenger & Anderson	Lincoln, Neb.	3,034.07	0.00	3,034.07
188	Gibson Capital	Wexford, Pa.	2,904.58	129.45	3,034.03
189	Elm Wealth	Philadelphia, Pa.	3,018.20	0.00	3,018.20
190	Chesley, Taft & Associates	Chicago, Ill.	2,762.14	251.38	3,013.51
191	Baltimore Washington Financial Advisors	Columbia, Md.	2,861.60	123.98	2,985.58

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192	Fairway Wealth Management	Independence, Ohio	1,302.15	1,675.07	2,977.22
193	Retirement Income Solutions	Ann Arbor, Mich.	2,972.36	0.00	2,972.36
194	SFMG Wealth Advisors	Plano, Texas	2,673.56	283.41	2,956.97
195	SJS Investment Services	Sylvania, Ohio	2,937.12	0.00	2,937.12
196	Foster & Motley	Cincinnati, Ohio	2,881.92	54.58	2,936.50
197	Bedel Financial Consulting	Indianapolis, Ind.	2,918.21	1.58	2,919.79
198	Berger Financial Group	Plymouth, Minn.	2,900.00	0.00	2,900.00
199	Regal Investment Advisors	Kentwood, Mich.	2,445.11	432.18	2,877.30
200	Capstone Financial Advisors	Downers Grove, Ill.	2,860.16	7.92	2,868.07
201	West Financial Services	McLean, Va.	2,811.30	24.91	2,836.21
202	Manchester Capital Management	Manchester, Vt.	2,772.66	60.14	2,832.80
203	Angeles Wealth Management	Santa Monica, Calif.	2,700.00	100.00	2,800.00
204	Diversified	Wilmington, Del.	2,726.84	64.29	2,791.13
205	CFS Investment Advisory Services	Totowa, N.J.	1,814.60	941.91	2,756.51
206	Arete Wealth Advisors	Chicago, Ill.	2,745.38	0.00	2,745.38
207	RTD Financial Advisors	Philadelphia, Pa.	2,701.43	23.15	2,724.58
208	Duncan Williams Asset Management	Memphis, Tenn.	2,245.11	449.32	2,694.43
209	NPF Investment Advisors	Grand Rapids, Mich.	2,691.11	0.00	2,691.11
210	Main Street Research	Lakeville, Conn.	2,681.89	0.00	2,681.89
211	Titleist Asset Management	San Antonio, Texas	2,622.00	33.19	2,655.19
212	Osborne Partners Capital Management	San Francisco, Calif.	2,609.01	42.26	2,651.27
213	Zemenick & Walker	St. Louis, Mo.	0.00	2,630.20	2,630.20
214	Trajan Wealth	Scottsdale, Ariz.	2,549.72	52.06	2,601.79
215	Icon Wealth Partners	Houston, Texas	2,577.33	0.00	2,577.33
216	Glassman Wealth Services	Vienna, Va.	2,404.47	152.38	2,556.85
217	Validus Capital	Los Angeles, Calif.	1,851.12	685.73	2,536.85
218	LVW Advisors	Pittsford, N.Y.	1,896.57	575.31	2,471.87
219	FBB Capital Partners	Bethesda, Md.	2,394.81	69.43	2,464.24
220	Guyasuta Investment Advisors	Pittsburgh, Pa.	2,437.46	0.00	2,437.46
221	Tschetter Group	Bellevue, Wash.	2,354.90	77.48	2,432.38
222	RZH Advisors	Stamford, Conn.	2,397.28	0.00	2,397.28
223	IFC Advisors	Los Angeles, Calif.	1,757.63	586.54	2,344.17
224	Magnus Financial Group	New York City, N.Y.	2,193.62	132.49	2,326.11
225	McKinley Carter Wealth Services	Wheeling, W.Va.	2,240.81	65.47	2,306.28
226	Fidelis Capital	Tampa, Fla.	2,244.74	39.71	2,284.45
227	Moneco Advisors	Fairfield, Conn.	2,259.28	20.63	2,279.90
228	Gateway Wealth Partners	Appleton, Wis.	1,663.99	614.84	2,278.84
229	Traphagen Investment Advisors	Oradell, N.J.	2,172.42	105.70	2,278.12
230	Beaird Harris Wealth Management	Dallas, Texas	2,242.96	24.78	2,267.74
231	Sather Financial Group	Victoria, Texas	2,260.36	6.71	2,267.06
232	California Financial Advisors	San Ramon, Calif.	2,010.47	252.91	2,263.38
233	Waterloo Capital	Austin, Texas	2,103.46	157.67	2,261.12
234	Rather & Kittrell	Knoxville, Tenn.	1,300.54	951.75	2,252.30
235	Cornerstone Advisory	Hunt Valley, Md.	2,249.01	0.00	2,249.01
236	Twelve Points Wealth Management	Concord, Mass.	2,135.96	107.90	2,243.86
237	LBMC Investment Advisors	Brentwood, Tenn.	2,226.00	0.00	2,226.00
238	Human Investing	lake Oswego, Ore.	964.23	1,259.94	2,224.16
239	Wealthquest Corporation	Cincinnati, Ohio	2,221.64	1.59	2,223.23

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240	Condor Capital Wealth Management	Martinsville, N.J.	1,845.82	333.88	2,179.70
241	PDS Planning	Dublin, Ohio	2,118.51	48.78	2,167.29
242	Abacus Planning Group	Columbia, S.C.	2,074.25	81.56	2,155.81
243	Van Hulzen Asset Management	El Dorado Hills, Calif.	2,126.19	17.16	2,143.35
244	Pinnacle Advisors	Mansfield, Ohio	2,120.98	15.49	2,136.47
245	Next Capital Management	New York, N.Y.	1,605.39	530.09	2,135.48
246	Segment Wealth Management	Houston, Texas	2,069.23	0.00	2,069.23
247	Cahaba Wealth Management	Atlanta, Ga.	2,060.89	0.00	2,060.89
248	Keebeck Wealth Management	Chicago, Ill.	2,027.91	0.00	2,027.91
249	ProVise Management Group	Clearwater, Fla.	2,000.00	25.00	2,025.00
250	Albion Financial Group	Salt Lake City, Utah	1,912.85	100.79	2,013.64
251	Woodmont Investment Counsel	Nashville, Tenn.	1,982.18	30.05	2,012.23
252	Physician Wealth Advisors	Salt Lake City, Utah	1,343.54	663.05	2,006.59
253	CapTrust Wealth Advisors	Holland, Mich.	1,990.55	12.32	2,002.87
254	Harbor Group	Bedford, N.H.	1,942.77	53.57	1,996.34
255	Wellesley Asset Management	Portsmouth, N.H.	1,991.27	4.02	1,995.29
256	Diversified Portfolios	Bloomfield Hills, Mich.	1,935.60	0.00	1,935.60
257	Conservest Capital Advisors	Wynnewood, Pa.	1,925.00	0.00	1,925.00
258	DT Investment Partners	Chadds Ford, Pa.	1,818.66	94.19	1,912.85
259	Clear Creek Financial Management	Silverdale, Wash.	1,862.82	46.54	1,909.36
260	Patriot Investment Management	Knoxville, Tenn.	1,899.78	7.08	1,906.86
261	Blue Chip Partners	Farmington Hills, Mich.	1,859.12	18.07	1,877.19
262	Sovran Advisors	San Diego, Calif.	1,871.98	2.37	1,874.35
263	Austin Asset	Austin, Texas	1,871.76	0.00	1,871.76
264	Private Advisory	Lehi, Utah	1,755.03	105.43	1,860.46
265	Azzad Asset Management	Falls Church, Va.	1,819.10	18.09	1,837.19
266	Berman McAleer	Timonium, Md.	1,821.80	0.00	1,821.80
267	Financial Synergies Wealth Advisors	Houston, Texas	1,797.54	13.77	1,811.30
268	Versant Capital Management	Phoenix, Ariz.	1,510.14	300.61	1,810.75
269	Altfest Personal Wealth Management	New York, N.Y.	1,798.32	0.00	1,798.32
270	TFC Financial Management	Boston, Mass.	1,780.83	0.00	1,780.83
271	Willis Johnson Wealth	Houston, Texas	1,763.70	0.00	1,763.70
272	R|W Investment Management	Eagle, Idaho	1,707.46	24.24	1,731.70
273	Catalyst Financial Partners	Boston, Mass.	1,722.30	0.00	1,722.30
274	Rothschild Wealth Partners	Oak Brook, Ill.	1,691.28	6.23	1,697.51
275	Petredis Investment Advisors	Warrendale, Pa.	1,686.98	0.00	1,686.98
276	Lee Financial	Dallas, Texas	1,651.95	30.52	1,682.47
277	Weatherly Asset Management	Del Mar, Calif.	1,664.88	13.07	1,677.95
278	Patton Albertson Miller Group	Chattanooga, Tenn.	1,677.77	0.00	1,677.77
279	Tom Johnson Investment Management	Oklahoma City, Okla.	1,632.59	0.00	1,632.59
280	Fortis Capital Advisors	Prairie Village, Kan.	1,615.58	0.00	1,615.58
281	Financial Plan	Bellingham, Wash.	1,604.66	0.00	1,604.66
282	Naviter Wealth	Little Rock, Ark.	1,601.90	0.00	1,601.90
283	Rollins Financial Advisors	Atlanta, Ga.	1,589.30	0.00	1,589.30
284	Petersen Hastings Wealth Advisors	Kennewick, Wash.	1,576.83	0.00	1,576.83
285	Brandywine Oak Private Wealth	Kenentt Square, Pa.	1,571.77	0.00	1,571.77
286	Astra Wealth Management Group	Plano, Texas	1,522.64	45.17	1,567.81
287	MJP Wealth Advisors	Farmington, Conn.	1,561.80	0.00	1,561.80

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288	Burton Enright Welch	Walnut Creek, Calif.	1,408.31	144.76	1,553.06
289	Falcon Wealth Planning	Ontario, Calif.	1,508.59	44.10	1,552.68
290	Pekin Hardy Strauss	Chicago, Ill.	1,551.74	0.00	1,551.74
291	Regatta Capital Group	El Segundo, Calif.	1,551.65	0.00	1,551.65
292	TritonPoint Wealth	Chevy Chase, Md.	1,549.52	0.00	1,549.52
293	Kings Path Partners	Sugar Land, Texas	607.12	921.61	1,528.74
294	Allen Capital Group	Grand Island, Neb.	1,495.91	5.64	1,501.56
295	Tower Bridge Advisors	West Conshohocken, Pa.	1,460.27	34.00	1,494.27
296	Destiny Wealth Partners	Tavares, Fla.	1,354.41	138.86	1,493.26
297	Retirement Investment Advisors	Oklahoma City, Okla.	1,489.75	0.00	1,489.75
298	Archford	Swansea, Ill.	1,489.12	0.00	1,489.12
299	Apriem Advisors	Irvine, Calif.	1,463.49	22.89	1,486.38
300	HORAN Wealth	Cincinnati, Ohio	1,461.00	9.00	1,470.00
301	Sargent Investment Group	Bethesda, Md.	1,146.21	320.59	1,466.79
302	CJM Wealth Advisers	Falls Church, Va.	1,396.48	69.70	1,466.18
303	Pinkerton Wealth	Coeur DAlene, Idaho	1,331.64	107.44	1,439.08
304	Wingate Wealth Advisors	Lexington, Mass.	1,157.30	258.00	1,415.30
305	Fiduciary Financial Advisors	Grand Rapids, Mich.	1,408.92	0.00	1,408.92
306	Claro Advisors	Boston, Mass.	1,376.75	30.91	1,407.66
307	Ellsworth Advisors	Hudson, Ohio	1,391.94	14.52	1,406.46
308	Acorn Financial Advisory Services	Reston, Va.	1,177.51	221.13	1,398.64
309	JL Bainbridge & Co.	Sarasota, Fla.	1,371.16	0.00	1,371.16
310	Next level Private	Harrison, N.Y.	1,244.61	125.37	1,369.97
311	Sheets Smith Wealth Management	Winston-Salem, N.C.	1,365.13	0.00	1,365.13
312	McIlrath & Eck	Arlington, Wash.	1,364.90	0.00	1,364.90
313	Moisand Fitzgerald Tamayo	Orlando, Fla.	1,350.22	0.00	1,350.22
314	Virtue Capital Management	Brentwood, Tenn.	1,310.52	0.00	1,310.52
315	Biondo Investment Advisors	Milford, Pa.	1,192.98	99.61	1,292.59
316	Stansberry Asset Mgmt. (now known as Meristead Wealth)	Westlake, Texas	1,291.27	0.00	1,291.27
317	Chemistry Wealth Management	New York, N.Y.	1,253.18	11.09	1,264.27
318	Ullmann Wealth Partners	Jacksonville Beach, Fla.	1,246.16	7.99	1,254.15
319	Absher Wealth Management	Chapel Hill, N.C.	1,167.30	86.21	1,253.50
320	Opal Wealth Advisors	Jericho, N.Y.	653.54	584.65	1,238.19
321	Keen Wealth Advisors	Overland Park, Kan.	1,232.76	0.65	1,233.41
322	HCM Wealth Advisors	Cincinnati, Ohio	1,230.58	0.00	1,230.58
323	Arista Wealth Management	Las Vegas, Nev.	1,022.56	179.25	1,201.81
324	Frazier Financial Advisors	Columbus, Ohio	1,150.00	50.00	1,200.00
325	Richard Young Advisors	Augusta, Ga.	1,195.34	0.00	1,195.34
326	Tobias Financial Advisors	Plantation, Fla.	1,163.00	28.00	1,191.00
327	DiNuzzo Private Wealth	Beaver, Pa.	1,177.33	0.00	1,177.33
328	Deerfield Financial Advisors	Indianapolis, Ind.	974.67	201.58	1,176.25
329	Brand Asset Management Group	Chesterfield, Mo.	1,143.49	30.90	1,174.40
330	StraightLine Group	Troy, Mich.	1,134.08	36.30	1,170.38
331	Woodard & Company Asset Management Group	Bermuda Run, N.C.	1,144.00	23.00	1,167.00
332	Great Lakes Retirement	Sheffield Village, Ohio	1,082.39	81.39	1,163.78
333	Lake Street Private Wealth	Chicago, Ill.	1,030.36	128.32	1,158.68
334	Alaska Wealth Advisors	Anchorage, Alaska	1,156.21	0.00	1,156.21
335	Lucid Advisors	Seattle, Wash.	52.66	1,094.70	1,147.36

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336	Elser Financial Planning	Indianapolis, Ind.	1,134.11	0.00	1,134.11
337	Aviance Capital Partners	Naples, Fla.	1,121.58	4.05	1,125.64
338	Insight Wealth Partners	Plano, Texas	1,122.45	1.77	1,124.22
339	Lynx Investment Advisory	Washington, D.C.	360.61	753.89	1,114.50
340	Arthur M. Cohen & Associates	Northbrook, Ill.	1,111.51	0.00	1,111.51
341	Stage Harbor Financial	Westwood, Mass.	1,097.17	0.00	1,097.17
342	Sovereign Financial Group	Stamford, Conn.	1,064.30	18.25	1,082.55
343	YeskeBuie	Vienna, Va.	1,061.58	7.77	1,069.35
344	Fiduciary Benefits Group	San Diego, Calif.	1,023.06	42.76	1,065.82
345	Insight Wealth Strategies	San Ramon, Calif.	1,063.96	0.02	1,063.98
346	Schnieders Capital Mangement	Pasadena, Calif.	1,008.94	52.13	1,061.07
347	FORM Wealth Advisors	Lake Geneva, Wis.	1,004.29	51.28	1,055.57
348	Armbruster Capital Management	Pittsford, N.Y.	965.77	89.29	1,055.07
349	Southern Financial Group	Birmingham, Ala.	1,050.14	0.00	1,050.14
350	MATAURO	New York, N.Y.	1,027.08	20.21	1,047.28
351	Baker Ellis Asset Management	Vancouver, Wash.	1,047.12	0.00	1,047.12
352	Morling Financial Advisors	Fremont, Calif.	960.57	86.49	1,047.06
353	Paragon Financial Advisors	College Station, Texas	1,045.00	0.00	1,045.00
354	William Mack and Associates	Troy, Mich.	1,032.25	2.36	1,034.61
355	Walkner Condon Financial Advisors	Madison, Wis.	968.78	62.41	1,031.18
356	Breakwater Capital Group	Paramus, N.J.	1,019.16	0.00	1,019.16
357	Verum Partners	Charlotte, N.C.	848.69	165.44	1,014.13
358	Fermata Advisors	Sonoma, Calif.	707.57	301.98	1,009.55
359	BlueSky Wealth Advisors	New Bern, N.C.	1,004.50	0.00	1,004.50
360	CapSouth Wealth Management	Dothan, Ala.	437.17	564.10	1,001.27
ASSET CATEGORY: $500 MILLION TO < $1 BILLION					
361	Omnia Family Wealth	Aventura, Fla.	814.03	180.55	994.58
362	MBE Wealth Management	Tomah, Wis.	749.88	227.23	977.10
363	Avion Wealth	The Woodlands, Texas	971.85	0.00	971.85
364	BentOak Capital	Weatherford, Texas	969.77	0.00	969.77
365	Maridea Wealth Management	Brooklyn, N.Y.	933.73	24.99	958.72
366	Legacy Financial Strategies	Overland Park, Kan.	795.22	156.81	952.03
367	Blankinship & Foster	Solana Beach, Calif.	939.51	0.00	939.51
368	Frisch Financial Group	Melville, N.Y.	893.24	38.33	931.56
369	Investmark Advisory Group	Shelton, Conn.	929.67	0.00	929.67
370	RiversEdge Advisors	Wilmington, Del.	924.34	3.96	928.30
371	Goodman Financial Corporation	Houston, Texas	912.53	3.40	915.93
372	StrategicPoint Investment Advisors	Providence, R.I.	914.76	0.00	914.76
373	Rosemeyer Management Group	Platteville, Wis.	873.85	40.11	913.96
374	Briaud Financial Advisors	College Station, Texas	861.97	50.82	912.79
375	Covenant Wealth Advisors	Richmond, Va.	890.17	19.48	909.64
376	MarsJewett Financial Group	Bellevue, Wash.	895.60	5.83	901.42
377	Asset Management Group	Stamford, Conn.	898.34	0.00	898.34
378	Christopher Weil & Company	San Diego, Calif.	876.88	19.37	896.24
379	3Chopt Investment Partners	Richmond, Va.	883.59	5.78	889.37
380	Correct Capital Wealth Management	Clayton, Mo.	601.04	288.31	889.35
381	Intelligence Driven Advisers	Carlsbad, Calif.	881.93	0.00	881.93
382	OPTAS Capital	Dripping Springs, Texas	881.91	0.00	881.91

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2025 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2025 ($MM)	NON-DISCRETIONARY ASSETS 2025 ($MM)	YEAR END 2025 ASSETS ($MM)
383	Leisure Capital Management	Costa Mesa, Calif.	873.95	0.00	873.95
384	TMB Capital Partners	Little Rock, Ark.	867.85	0.00	867.85
385	Level Financial Advisors	East Amherst, N.Y.	837.76	24.90	862.66
386	Birchwood Financial Partners	Bloomington, Minn.	830.33	22.87	853.20
387	Whitaker-Myers Wealth Managers	Mansfield, Ohio	793.75	56.86	850.61
388	Net Worth Advisory Group	Sandy, Utah	474.66	363.71	838.37
389	Global Financial Private Client	Sarasota, Fla.	688.48	139.85	828.33
390	Asio Capital	Lexington, Ky.	805.09	0.00	805.09
391	Carolina Wealth Management	Greenville, N.C.	583.82	214.64	798.46
392	JVL Wealth Strategies	Wyoming, Mich.	757.84	26.57	784.41
393	Bellwether Wealth	Lincoln, Neb.	782.84	1.18	784.02
394	Centurion Wealth Management	McLean, Va.	730.56	53.45	784.01
395	Factor Wealth Management	Chicago, Ill.	764.86	16.16	781.02
396	FMB Wealth Management	Westlake Village, Calif.	775.00	0.00	775.00
397	Wilsey Asset Management	San Diego, Calif.	723.54	44.93	768.47
398	Hopwood Financial Services	Reston, Va.	750.26	0.00	750.26
399	Porter White Investment Advisors	Birmingham, Ala.	734.39	13.82	748.21
400	Financial Insights Wealth Management	Tacoma, Wash.	708.48	38.27	746.75
401	Sensible Money	Scottsdale, Ariz.	742.53	0.00	742.53
402	Gradient Capital Advisors	San Diego, Calif.	648.17	94.03	742.20
403	ARQ Wealth Advisors	Scottsdale, Ariz.	738.86	0.00	738.86
404	The Marshall Financial Group	Hunt Valley, Md.	712.63	22.94	735.57
405	Financial Management Strategies	Braodview Hts., Ohio	585.99	128.24	714.24
406	Manske Wealth Management	Houston, Texas	707.32	0.00	707.32
407	NorthCape Wealth Management	Williamsville, N.Y.	666.98	39.11	706.08
408	Solidarity Wealth	Lehi, Utah	704.16	0.00	704.16
409	Grey Fox Wealth Advisors	Rockland, Del.	594.23	104.53	698.76
410	Marotta Wealth Management	Charlottesville, Va.	660.90	25.14	686.04
411	Precedent Wealth Partners	Houston, Texas	652.81	32.24	685.05
412	Sandbox Financial Partners	Bethesda, Md.	621.90	59.77	681.67
413	von Borstel & Associates	The Dalles, Ore.	680.19	0.00	680.19
414	Alteri Wealth	Westlake Village, Calif.	543.36	132.93	676.29
415	Boston Research & Management	Manchester-by-the-Sea, Mass.	676.19	0.00	676.19
416	Trinity Financial Advisors	Columbus, Ohio	668.45	1.54	669.99
417	Stone Temple Partners	New York, N.Y.	43.60	625.00	668.60
418	Three Arch Wealth Management	Irvine, Calif.	662.44	0.00	662.44
419	Bare Wealth Advisors	Gap, Pa.	640.76	21.51	662.26
420	Aspen Wealth Management	Fort Worth, Texas	654.88	2.94	657.83
421	Optima Asset Management	Dallas, Texas	0.00	657.41	657.41
422	Family Office Research	Bethesda, Md.	393.53	254.68	648.21
423	Granite Harbor Advisors	Houston, Texas	635.84	6.30	642.14
424	Peregrine Asset Advisers	Portland, Ore.	630.00	6.00	636.00
425	Fire Capital Management	San Francisco, Calif.	634.64	0.81	635.45
426	WJ Interests	Sugar Land, Texas	634.00	0.00	634.00
427	Stenger Family Office	Naperville, Ill.	624.98	3.15	628.13
428	GEM Asset Management	Plymouth, Mich.	628.06	0.00	628.06
429	B&C Financial Advisors	Ponte Vedra Beach, Fla.	613.87	12.14	626.01
430	FCA Corp	Houston, Texas	494.22	128.90	623.12

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2025 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2025 ($MM)	NON-DISCRETIONARY ASSETS 2025 ($MM)	YEAR END 2025 ASSETS ($MM)
431	Hapanowicz Financial	pittsburgh, Pa.	519.54	102.78	622.32
432	Alpha Financial Advisors	Charlotte, N.C.	617.14	2.18	619.32
433	Financial Alternatives	La Jolla, Calif.	607.44	7.34	614.78
434	Keeler & Nadler Family Wealth	Dublin, Ohio	565.13	44.78	609.90
435	Treehouse Wealth Advisors	Walnut Creek, Calif.	581.10	15.96	597.06
436	Financial Gravity Family Office Services	Austin, Texas	590.46	0.00	590.46
437	Pathview Wealth Advisors	San Diego, Calif.	545.82	37.15	582.97
438	O'Keefe Stevens Advisory	Rochester, N.Y.	581.54	0.00	581.54
439	Jackson Square Capital	San Francisco, Calif.	520.93	43.36	564.29
440	Brooklyn Fi	Brooklyn, N.Y.	563.10	0.00	563.10
441	StrongBox Wealth	Lee's Summit, Mo.	528.79	33.65	562.44
442	Empirical Asset Management	Wellesley, Mass.	539.22	20.35	559.57
443	QP Consulting	Takoma Park, Md.	97.00	462.06	559.06
444	SGH Wealth Management	Lathrup Village, Mich.	558.49	0.00	558.49
445	HT Partners	Centerbrook, Conn.	552.25	4.08	556.33
446	Absolute Capital Management	Pittsburgh, Pa.	546.76	7.20	553.95
447	Asset Planning	Los Alamitos, Calif.	552.34	1.12	553.46
448	Miramar Capital	Northbrook, Ill.	543.07	7.18	550.25
449	Andrews, Lucia Wealth Management	Danville, Calif.	543.49	0.00	543.49
450	ShoreHaven Wealth Partners	Red Bank, N.J.	541.51	0.00	541.51
451	Meritas Wealth Management	San Rafael, Calif.	533.82	0.00	533.82
452	Pension & Wealth Management Advisors	Waltham, Mass.	511.83	17.99	529.81
453	Searcy Financial Services	Overland Park, Kan.	513.97	0.00	513.97
454	Client 1st Advisory Group	Dunedin, Fla.	508.25	3.24	511.49
455	Fidato Wealth	Middleburg Heights, Ohio	510.75	0.00	510.75
456	Horizon Financial	West Henrietta, N.Y.	510.21	0.00	510.21
457	Monument Wealth Management	Alexandria, Va.	493.92	14.88	508.80
458	Zuraw Financial Advisors	Greensboro, N.C.	504.39	0.00	504.39
459	Ducere Wealth Management	Northbrook, Calif.	495.62	8.17	503.79
ASSET CATEGORY: $250 MILLION TO < $500 MILLION					
460	Samalin Wealth	Chappaqua, N.Y.	445.27	45.28	490.54
461	Hixon Zuercher Capital Management	Findlay, Ohio	464.41	23.30	487.71
462	MBM Wealth Consultants	Chesterfield, Mo.	477.00	0.00	477.00
463	Brown Financial Advisory	Fairhope, Ala.	464.23	3.99	468.22
464	Steadmont Advisors	Birmingham, Ala.	427.49	3.25	430.74
465	Integrated Capital Management	Bloomfield Hills, Mich.	429.73	0.03	429.76
466	McCarthy Asset Management	Redwood Shores, Calif.	422.40	0.00	422.40
467	Everest Private Wealth	Cupertino, Calif.	380.69	30.10	410.80
468	Ballast Rock Private Wealth	Charleston, S.C.	361.93	43.81	405.74
469	Mighty Oak Strong America Investment Co.	Mechanicsburg, Pa.	398.37	0.00	398.37
470	Legacy Consulting Group	Plano, Texas	366.26	12.39	378.65
471	Advisor Share Wealth Management	Vancouver, Wash.	376.94	0.00	376.94
472	Baron Financial Group	Fair Lawn, N.J.	364.06	5.05	369.11
473	Tull Financial Group	Chesapeake, Va.	364.00	3.08	367.09
474	Canter Wealth	La Jolla, Calif.	366.54	0.00	366.54
475	Momentous Wealth Management	Vancouver, Wash.	349.72	6.31	356.04
476	Foresight Capital Management Advisors	Saline, Mich.	349.48	1.62	351.10
477	Premia Global Advisors	Coral Gables, Fla.	315.88	24.94	340.82

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FA's 2026 RIA Discretionary & Non-Discretionary AUM Ranking

2025 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2025 ($MM)	NON-DISCRETIONARY ASSETS 2025 ($MM)	YEAR END 2025 ASSETS ($MM)
478	Powers Advisory Group	Highland, Ill.	329.50	0.00	329.50
479	DAI Advisors	Menlo Park, Calif.	65.59	263.66	329.25
480	Centerline Wealth Advisors	Louisville, Ky.	325.31	0.73	326.04
481	Johnson Wealth Management	Grand Forks, N.D.	323.37	0.00	323.37
482	Life Planning Partners	Jacksonville, Fla.	311.14	0.82	311.97
483	Kotys Wealth Professionals	Valapraiso, Ind.	308.02	0.00	308.02
484	Gold Medal Waters	Boulder, Colo.	279.42	6.21	285.64
485	Pearson Creek Capital Management	Chicago, Ill.	284.81	0.00	284.81
486	Financial Futures	Brielle, N.J.	270.00	0.00	270.00
487	Byrne Asset Management	Kingston, N.J.	268.84	0.00	268.84
488	Birch Financial Group	Keene, N.H.	264.69	0.00	264.69
489	Center For Asset Management	Palm Beach Gardens, Fla.	257.14	0.00	257.14
ASSET CATEGORY: $150 MILLION TO < $250 MILLION					
490	Atwater Wealth Management	Boston, Mass.	248.23	0.00	248.23
491	Smith Bruer	Tallahassee, Fla.	173.10	65.38	238.48
492	Capital Financial Group	Littleton, Colo.	219.48	17.89	237.37
493	Westview Investment Advisors	Burlington, Vt.	228.65	0.00	228.65
494	Beacon Financial Advisors	Rye Brook, N.Y.	209.84	18.17	228.01
495	Professional Financial Strategies	Pittsford, N.Y.	210.74	15.07	225.81
496	Purtill Financial	Highland Heights, Ohio	0.00	207.05	207.05
497	Flagship Capital Management	Media, Pa.	198.00	0.00	198.00
498	D.M. Brenner	Solana Beach, Calif.	193.62	0.00	193.62
499	Ivy League Financial Advisors	Rockville, Md.	188.67	0.00	188.67
500	Financial Consultants Group	Cumming, Ga.	184.69	3.48	188.17
501	Roxbury Financial	Mount Arlington, N.J.	162.97	17.50	180.47
502	SageOak Financial	Tulsa, Okla.	174.82	0.00	174.82
503	Steward Advisors	Chicago, Ill.	145.13	15.60	160.74
504	Wise Wealth Partners	Phoenix, Ark.	153.45	0.00	153.45
505	Paragon Wealth Management	Provo, Utah	146.00	7.42	153.42
ASSET CATEGORY: < $150 MILLION					
506	Ankerstar Wealth	Leander, Texas	141.11	7.39	148.50
507	Sierra Financial Advisory	Nevada City, Calif.	138.59	6.34	144.93
508	MTR Financial Services	Kingwood, Texas	119.93	0.00	119.93
509	Oak Summit Wealth Management	San Diego, Calif.	76.52	5.49	82.01
510	Graf Financial	Baton Rouge, La.	79.53	0.75	80.28
511	Venn Wealth & Benefit Services	Altoona, Pa.	30.14	2.18	32.32
512	Strada Wealth Management	Austin, Calif.	28.84	2.03	30.86
513	Aurora Strategic Advisors	Lumberton, N.C.	24.10	6.50	30.60
514	Safe Harbor Asset Management	Huntington, N.Y.	26.81	0.00	26.81
515	Old Oak Advisors	Vestavia Hills, Ala.	22.32	2.45	24.77
516	Birch Investment Management	Brookings, S.D.	23.28	0.00	23.28

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