



# THE STARS

Rank/Firm	Location	Avg. client relationship	Rank/Firm	Location	Avg. client relationship
1 S4 Capital	Chicago, IL	\$76,071,867.96	51 Wescott Financial Advisory Group	Philadelphia, PA	\$4,112,554.11
2 SCS Financial Services	Waltham, MA	60,971,317.69	52 Private Capital Management	Larkspur, CA	4,000,000.00
3 Ballentine, Finn & Company	Waltham, MA	59,126,738.46	53 Johnson Investment Counsel	Cincinnati, OH	3,992,740.47
4 The Threshold Group	Gig Harbor, WA	52,000,000.00	54 Aufman Associates	Sewickley, PA	3,873,185.69
5 Quintile Investment Advisors	Los Angeles, CA	47,693,203.67	55 Halbert, Hargrove/Russell	Long Beach, CA	3,778,182.15
6 BBR Partners	New York, NY	46,760,069.02	56 WMS Partners	Towson, MD	3,760,369.18
7 Lake Street Advisors	Portsmouth, NH	39,947,368.42	57 VERITY Wealth Advisors	San Francisco, CA	3,750,000.00
8 Vogel Consulting	Brookfield, WI	37,507,936.51	58 Homrich & Berg	Atlanta, GA	3,735,628.92
9 Silvercrest Asset Mgmt. Grp.	New York, NY	33,231,111.11	59 Meristem (The Sage Partnership)	Minnetonka, MN	3,676,394.96
10 Massey, Quick & Co.	Morristown, NJ	32,695,670.21	60 Lau Associates	Wilmington, DE	3,608,695.65
11 Gresham Partners	Chicago, IL	26,052,312.01	61 Pennsylvania Capital Management	Jenkintown, PA	3,530,420.93
12 Financial Clarity	Mountain View, CA	25,439,148.48	62 Guyasuta Investment Advisors	Pittsburgh, PA	3,527,719.10
13 Tolleson Private Wealth Mgmt.	Dallas, TX	23,397,058.82	63 Brouwer & Janachowski	Tiburon, CA	3,404,207.16
14 Crestone Asset Management	Boulder, CO	22,058,823.53	64 Ritter Wealth Counsel	San Rafael, CA	3,383,362.50
15 Lydian Wealth Mgmt. Company	Rockville, MD	20,801,368.22	65 Goldstein Munger + Associates	San Ramon, CA	3,380,742.96
16 Arlington Partners	Birmingham, AL	19,390,243.90	66 Plancorp	Chesterfield, MO	3,340,634.69
17 Presidio Wealth Management	San Francisco, CA	18,792,842.59	67 Brookstone Advisory Inv.	Baltimore, MD	3,299,333.33
18 Beacon Pointe Advisors	Newport Beach, CA	18,551,323.61	68 Oxford Investment Partners	Phoenix, AZ	3,223,101.79
19 Highmount Capital	New York, NY	17,981,818.18	69 Integrated Financial Services	Weston, CT	3,220,228.73
20 ACG Advisory Services	Midlothian, VA	17,846,214.29	70 Wetherby Asset Management	San Francisco, CA	3,173,913.04
21 Inlign Wealth Management	Phoenix, AZ	17,629,202.00	71 Capital Financial Advisors	La Jolla, CA	3,125,000.00
22 Hillview Capital Advisors	Ardmore, PA	16,187,885.83	72 Diversified Management	Milwaukee, WI	3,092,592.59
23 Litman/Gregory Asset Mgmt.	Larkspur, CA	15,149,455.21	73 Resource Consulting Group	Orlando, FL	3,091,709.49
24 Altair Advisers	Chicago, IL	13,809,669.09	74 King Investment Advisors	Houston, TX	3,016,683.33
25 Oxford Financial Group	Indianapolis, IN	13,099,793.67	75 Fieldstone Financial Mgmt. Group	Boston, MA	2,986,301.37
26 Aegis Wealth Management	Bethesda, MD	11,369,472.87	76 Hynes, Himmelreich, Glenneon	Darien, CT	2,969,341.48
27 Clarfeld Financial Advisors	Tarrytown, NY	9,931,818.18	77 AQN Advisors	Reno, NV	2,949,858.23
28 Trees Investment Counsel	Chicago, IL	9,234,318.48	78 Truepoint Capital	Cincinnati, OH	2,924,505.88
29 Laird Norton Tyee Asset Strategies	Seattle, WA	8,655,676.06	79 Douglas C. Lane & Associates	New York, NY	2,880,727.07
30 Manchester Capital Management	Manchester, VT	8,494,736.84	80 Towneley Capital Management	Laguna Hills, CA	2,803,481.23
31 The MDE Group	Parsippany, NJ	8,068,078.00	81 Henssler Asset Management	Kennesaw, GA	2,779,509.37
32 Trevor Stewart Burton & Jacobsen	New York, NY	8,053,377.78	82 Vigilant Capital Management	Portland, ME	2,740,084.63
33 Green Square Capital	Memphis, TN	7,792,537.31	83 Moneta Grp. Investment Advisors	Clayton, MO	2,734,297.04
34 Meltzer Wealth Management	Bethesda, MD	7,692,018.24	84 DCA Global Investment Mgmt.	Norcross, GA	2,689,836.80
35 Waypoint Advisors	Norfolk, VA	6,967,741.94	85 Beaumont Financial Partners	Wellesley Hills, MA	2,655,210.18
36 Universal Advisory Services	Albuquerque, NM	6,714,285.71	86 McQueen, Ball & Associates	Bethlehem, PA	2,654,222.39
37 Essential Advisers	Denver, CO	6,588,475.71	87 Warwick Partners	Bryan, TX	2,612,380.95
38 Zemenick & Walker	St. Louis, MO	6,535,256.58	88 Mintz Levin Financial Advisors	Boston, MA	2,500,000.00
39 Highland Capital Management	Bellevue, WA	6,471,867.75	89 Crestwood Advisors	Boston, MA	2,485,793.27
40 Kochis Fitz	San Francisco, CA	6,401,748.30	90 Hudson Advisor Services	Buffalo, NY	2,446,391.08
41 Hewins Financial Advisors	Foster City, CA	6,181,818.18	91 Trinity Financial Advisors	Chicago, IL	2,443,959.44
42 Relyea Zuckerberg Hanson	Stamford, CT	5,637,931.03	92 Brightworth	Norcross, GA	2,392,798.73
43 Camden Capital Management	El Segundo, CA	5,185,185.19	93 Abacus Planning Group	Columbia, SC	2,387,312.44
44 RS Crum	Newport Beach, CA	5,175,438.60	94 F&D Advisors	Atlanta, GA	2,369,592.17
45 The Glowacki Group	Los Angeles, CA	5,138,322.87	95 Evensky & Katz	Coral Gables, FL	2,313,760.98
46 Fairway Wealth Management	Westlake, OH	5,084,745.76	96 Legacy Capital Management	Roseville, CA	2,271,428.57
47 Capital Management Group	Maitland, FL	4,456,521.74	97 Leisure Capital Management	Costa Mesa, CA	2,266,271.43
48 Plante Moran Financial Advisors	Southfield, MI	4,358,595.19	98 Bingham, Osborn & Scarborough	San Francisco, CA	2,252,083.85
49 AMI Investment Management	Kendallville, IN	4,193,297.22	99 Sovereign Wealth Management	Memphis, TN	2,248,146.51
50 Paragon Capital Management	Denver, CO	4,127,167.50	100 Strategic Wealth Advisors	Scottsdale, AZ	2,246,000.00

## OUR TOP WEALTH MANAGERS

Rank/Firm	Location	Avg. client relationship	Rank/Firm	Location	Avg. client relationship		
101	Altavista Wealth Management	Asheville, NC	\$2,198,378.71	151	Diesslin & Associates	Fort Worth, TX	\$1,631,578.95
102	RegentAtlantic Capital	Chatham, NJ	2,183,528.24	152	Netting & Pace, CPAs	San Antonio, TX	1,626,276.02
103	Rowland Carmichael Advisors	Scottsdale, AZ	2,177,774.74	153	Touchstone Investment Consultants	Minneapolis, MN	1,609,375.00
104	Catalyst Fin'l. Planning & Invest. Mgmt.	Oakland, CA	2,171,490.00	154	Applied Financial Group	Atlanta, GA	1,592,652.00
105	Lewis & Mathews Invest. Mgmt.	Menlo Park, CA	2,155,544.55	155	Emerald Asset Advisors	Weston, FL	1,590,938.06
106	Resource Management	Metairie, LA	2,151,702.79	156	Mission Wealth Management	Santa Barbara, CA	1,589,753.66
107	Stepp & Rothwell	Overland Park, KS	2,127,967.17	157	Accredited Investors	Edina, MN	1,582,089.55
108	Thomas Barrett & Assoc.	Denver, CO	2,105,263.16	158	Schiavi + Company	Wilmington, DE	1,581,105.26
109	Zdenek Financial Planning	Flemington, NJ	2,097,222.22	159	Lewis Financial Management	Raleigh, NC	1,577,912.15
110	Charles D. Haines	Birmingham, AL	2,092,564.64	160	CFG Wealth Management Services	Indianapolis, IN	1,571,428.57
111	Freestone Capital Management	Seattle, WA	2,064,185.71	161	Balasa Dinverno & Foltz	Itasca, IL	1,546,030.59
112	Wealth Management Consultants	Santa Rosa, CA	2,055,000.00	162	Slayton Lewis	Salt Lake City, UT	1,528,810.21
113	Acropolis Investment Management	St. Louis, MO	2,049,372.33	163	Steinberg Global Asset Management	Boca Raton, FL	1,528,335.86
114	Camden Financial Management	Scottsdale, AZ	2,045,519.88	164	Patten and Patten	Chattanooga, TN	1,525,000.08
115	Sigma Investment Management Co.	Portland, OR	2,037,815.31	165	Neumann Capital Management	San Mateo, CA	1,519,549.47
116	Burroughs Hutchinson	Boise, ID	2,011,827.81	166	Private Wealth Management	Mesa, AZ	1,511,142.06
117	Quadrant Capital Management	Montclair, NJ	1,949,408.11	167	Burt Associates	Rockville, MD	1,498,560.75
118	Ogorek Wealth Management	Williamsville, NY	1,911,758.50	168	Novare Capital Management	Charlotte, NC	1,487,403.12
119	Brinton Eaton Associates	Morristown, NJ	1,862,663.32	169	Friedman & Associates	Novato, CA	1,486,689.03
120	FFR Advisory	Seal Beach, CA	1,861,581.92	170	Briaud Financial Planning	Bryan, TX	1,479,076.27
121	PacWest Financial Management	Phoenix, AZ	1,858,908.62	171	Salient Financial Corp.	San Rafael, CA	1,478,873.24
122	Stanford Investment Group	Mountain View, CA	1,845,001.47	172	Jackson Financial Management	Newport Beach, CA	1,456,463.32
123	Weaver and Tidwell Financial Advisors	Dallas, TX	1,840,740.74	173	Wade Financial Group	Minneapolis, MN	1,451,538.46
124	Columbia Asset Management	Ann Arbor, MI	1,835,384.62	174	Sterling Financial Advisors	Wyomissing, PA	1,444,444.44
125	Cookson, Peirce & Co.	Pittsburgh, PA	1,828,766.34	175	Krasney Financial	Brookside, NJ	1,440,714.29
126	Kahler Financial Group	Rapid City, SD	1,819,864.11	176	Capelli Financial Services	Bloomfield Hills, MI	1,431,785.26
127	Wealth Planning & Management	Indianapolis, IN	1,819,515.33	177	Sentinel Wealth Management	Reston, VA	1,426,453.88
128	Wescap Management Group	Burbank, CA	1,818,068.70	178	Coldstream Capital Management	Bellevue, WA	1,426,261.93
129	Financial Synergies Advisory	Houston, TX	1,810,862.31	179	Punch & Associates Investment Mgmt.	Minneapolis, MN	1,425,000.00
130	Ramsey & Associates	Seattle, WA	1,800,380.21	180	Horizon Advisors	Houston, TX	1,418,548.64
131	YellowWood Financial Advisors	Bethesda, MD	1,784,176.47	181	Redwood Investment Advisors	Indianapolis, IN	1,417,085.43
132	Preservation Capital Partners	Skokie, IL	1,777,777.78	182	BHCO Capital Management	Dallas, TX	1,409,935.57
133	The Fairman Group	Berwyn, PA	1,772,986.50	183	MACRO Consulting Group	Parsippany, NJ	1,405,405.41
134	Frederic T. Kutscher Associates	Seattle, WA	1,768,823.53	184	Barry M. Corkern & Co.	Little Rock, AR	1,400,998.45
135	Albion Financial Group	Salt Lake City, UT	1,761,817.39	185	Mosaic Financial Partners	San Francisco, CA	1,396,849.57
136	The Monitor Group	McLean, VA	1,759,642.88	186	Legacy Consulting Group	Plano, TX	1,390,859.88
137	Greenbaum and Orecchio	Old Tappan, NJ	1,755,581.30	187	Masters Legacy Planning	Somers Point, NJ	1,377,777.78
138	Starmont Asset Management	Danville, CA	1,753,130.14	188	Back Bay Financial Group	Boston, MA	1,371,371.66
139	Houlihan Financial Resource Group	Reston, VA	1,732,986.75	189	Financial Advantage	Columbia, MD	1,371,237.14
140	Hogan Financial Management	Milwaukee, WI	1,720,352.05	190	Colman Knight Advisory Group	Carlisle, MA	1,358,229.67
141	GV Capital Management	Atlanta, GA	1,714,143.78	191	West Financial Services	McLean, VA	1,354,161.58
142	Physicians' Asset Management	Marina del Rey, CA	1,706,293.71	192	Hokanson Capital Management	Solana Beach, CA	1,338,501.35
143	Empyrion Wealth Management	Roseville, CA	1,702,774.89	193	Freed Myers	Chevy Chase, MD	1,337,150.30
144	Morton Capital Management	Calabasas, CA	1,686,686.91	194	Cornerstone Capital Advisors	Uniontown, OH	1,334,356.20
145	LBMC Investment Advisors	Brentwood, TN	1,676,470.59	195	Sage Financial Group	West Conshohocken, PA	1,333,041.58
146	JMG Financial Group	Oak Brook, IL	1,675,558.97	196	Global Investment Management	Princeton, NJ	1,316,800.00
147	Regent Wealth Management Group	Woodbridge, CT	1,666,666.67	197	Vista Capital Partners	Portland, OR	1,315,789.47
148	South Texas Money Management	San Antonio, TX	1,663,176.57	198	Alexander Randolph Advisory	Vienna, VA	1,314,609.72
149	Emeral Asset Advisors	Weston, FL	1,653,846.15	199	Novos Planning Associates	New York, NY	1,314,398.77
150	Dowling & Yahnke	San Diego, CA	1,637,747.86	200	AndersonFisher	Lake Oswego, OR	1,310,344.83



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201 Stellar Capital Management	Phoenix, AZ	\$1,310,000.00	251 HC Financial Advisors	Lafayette, CA	\$1,033,606.67
202 CFSE Wealth Management	Winter Park, FL	1,305,194.81	252 Cabot Money Management	Salem, MA	1,031,953.85
203 R.M. Davis	Portland, ME	1,298,334.07	253 Point View Financial Services	Summit, NJ	1,027,143.51
204 Lassus Wherley & Associates	New Providence, NJ	1,289,813.02	254 Wellesley Investment Advisors	Wellesley, MA	1,025,700.94
205 Ray Mignone & Co.	Little Neck, NY	1,283,185.84	255 WJ Interests	Sugar Land, TX	1,020,318.68
206 Technomart Investment Advisors	Baltimore, MD	1,278,598.71	256 SYM Financial Advisors	Warsaw, IN	1,017,465.01
207 JFS Wealth Advisors	Hermitage, PA	1,275,121.16	257 Telemus Capital Partners	Southfield, MI	1,016,000.00
208 Firestone Capital Management	Coral Gables, FL	1,269,725.09	258 The Arkansas Financial Group	Little Rock, AR	1,013,829.63
209 Provenance Wealth Advisors	Fort Lauderdale, FL	1,250,000.00	259 Braver Wealth Management	Newton, MA	1,013,320.44
210 Legacy Capital Partners	Milwaukee, WI	1,246,828.00	260 Buffington Mohr McNeal	Boise, ID	1,008,874.86
211 Young, Svanoes and Associates	West Des Moines, IA	1,238,807.69	261 Harbor Financial Advisory	Boulder, CO	1,003,923.08
212 Mullaney, Keating & Wright	Farmington, CT	1,224,664.64	262 Tellone Management Group	Anaheim Hills, CA	1,003,953.85
213 Schultz Financial Group	Reno, NV	1,221,547.04	263 Goepper/Burkhardt	Greenville, SC	1,000,000.00
214 The Windsor Group	Indianapolis, IN	1,214,285.71	264 GDM Advisory Group	Jenkintown, PA	1,000,000.00
215 Financial Advisory Service	Leawood, KS	1,209,411.71	265 Westport Resources Management	Westport, CT	995,821.79
216 Money Consultants	Southport, CT	1,200,000.00	266 Financial Synergies Asset Mgmt.	Houston, TX	990,614.84
217 The Jentner Corporation	Akron, OH	1,199,825.00	267 R. W. Rogé & Company	Bohemia, NY	978,318.29
218 CFS Investment Advisory Services	Totowa, NJ	1,192,711.96	268 MJB Asset Management	New York, NY	975,505.26
219 TriCapital Advisors	North Bethesda, MD	1,188,888.29	269 Portfolio Advisory Council	Houston, TX	975,175.96
220 Briggs Wealth Management	Glastonbury, CT	1,181,624.94	270 Strategic Financial Mgmt. Group	Dallas, TX	963,636.36
221 Madison Financial Advisors	Cincinnati, OH	1,179,496.00	271 Wealth Management	Appleton, WI	955,555.56
222 H.L. Zeve Associates	Pittsburgh, PA	1,177,962.10	272 Vaughan and Company Securities	Ridgewood, NJ	954,555.56
223 L.J. Altfest & Co.	New York, NY	1,171,140.94	273 Wealth Management Group	Englewood, CO	953,846.15
224 R. E. Wacker Associates	San Luis Obispo, CA	1,163,512.61	274 Bernhardt Wealth Management	McLean, VA	951,817.75
225 Legacy Advisors	McLean, VA	1,134,582.15	275 Huff, Stuart & Carlton (Moneywise)	Forest, VA	951,075.47
226 Langer Wealth Management	Wilmington, NC	1,129,411.76	276 Paradigm Financial Advisors	Des Peres, MO	950,029.84
227 Keats, Connelly & Associates	Phoenix, AZ	1,128,065.60	277 Wingate Financial Corporation	Lexington, MA	947,688.79
228 Lakeside Advisors	Seattle, WA	1,120,855.02	278 Austin Asset Management Company	Austin, TX	944,067.94
229 Blankinship & Foster	Solana Beach, CA	1,110,494.58	279 TD Capital Management	Memphis, TN	942,974.21
230 Southwest Strategies	Dallas, TX	1,108,412.04	280 Pinnacle Wealth Planning Services	Mansfield, OH	939,682.54
231 Pacific Investment Advisors	Portland, OR	1,105,714.29	281 Winch Advisory Services	Appleton, WI	936,389.57
232 FirsTrust	Daytona Beach, FL	1,099,236.64	282 Oak Financial Group	Stamford, CT	925,532.34
233 Lodestar Private Asset Management	Alamo, CA	1,096,453.96	283 Doyle Wealth Management	St Petersburg, FL	924,177.78
234 Foster Group	West Des Moines, IA	1,089,060.22	284 Legacy Wealth Management	Memphis, TN	921,697.25
235 Berno Financial Management	Cincinnati, OH	1,085,707.08	285 White Oaks Wealth Advisors	Minneapolis, MN	920,291.34
236 American Economic Planning Group	Watchung, NJ	1,078,713.97	286 M. J. Smith and Associates	Englewood, CO	908,000.00
237 Hammel Financial Advisory Group	Brentwood, TN	1,075,522.98	287 Arbor Capital Management Corp.	Amherst, NY	899,804.37
238 CMC Advisers	Portland, OR	1,074,285.71	288 Hamilton Capital Management	Columbus, OH	898,437.53
239 Select Consulting	Charlotte, NC	1,072,538.86	289 Weatherly Asset Management	Del Mar, CA	897,250.01
240 Rowling, Dold & Associates	San Diego, CA	1,071,157.35	290 Ken Stern & Associates	San Diego, CA	896,501.32
241 The Welch Group	Birmingham, AL	1,061,638.40	291 Gerstein, Fisher & Associates	New York, NY	892,857.14
242 Koesten Hirschmann & Crabtree	Overland Park, KS	1,054,263.57	292 WNA Investment Programs	Hinsdale, IL	890,882.81
243 Vector Wealth Management	Minneapolis, MN	1,052,091.25	293 WealthQuest Financial Services	Norfolk, VA	885,505.53
244 Brian Puckett Retirement Advisors	Oklahoma City, OK	1,050,167.87	294 The Asset Advisory Group	Cincinnati, OH	876,389.54
245 Blume Capital Management	Berkeley, CA	1,050,000.00	295 Alexandria Financial Associates	Alexandria, VA	875,000.00
246 Hopwood Financial Services	Great Falls, VA	1,046,867.87	296 Bedel Financial Consulting	Indianapolis, IN	874,866.58
247 Hammer Asset Management	Laconia, NH	1,044,269.48	297 Rainsberger Wealth Advisors	Colorado Springs, CO	872,993.02
248 Tobias Financial Advisors	Plantation, FL	1,036,729.60	298 G.W. Henssler & Associates	Kennesaw, GA	871,188.62
249 Galecki Financial Management	Fort Wayne, IN	1,036,036.04	299 Carnegie Capital Asset Mgmt. Co.	Cleveland, OH	\$871,111.11
250 The L. Warner Companies	Timonium, MD	1,034,797.36	300 Medley & Brown	Jackson, MS	869,217.97

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Rank/Firm	Location	Avg. client relationship	Rank/Firm	Location	Avg. client relationship
301 Creative Planning	Overland Park, KS	\$863,636.36	351 Syverson Strege & Company	West Des Moines, IA	\$709,740.32
302 Wechter Financial Services	Parsippany, NJ	857,764.40	352 Kaye Capital Management	Los Angeles, CA	709,283.22
303 Greystone Financial Group	Troy, MI	844,815.03	353 Covenant Wealth Advisors	Williamsburg, VA	709,051.15
304 Mallard Advisors	Newark, DE	841,445.78	354 THOR Investment Management	Cincinnati, OH	705,659.18
305 Sadoff Investment Management	Milwaukee, WI	837,013.10	355 Warren, Averett, Kimbrough & Marino Wlth. Mgmt.	Birmingham, AL	705,298.46
306 Signature Estate & Invest. Advisors	Los Angeles, CA	836,112.06	356 Tull Financial Group	Chesapeake, VA	698,381.43
307 Mark Sheptoff Financial Planning	Glastonbury, CT	835,051.55	357 Kabarec Financial Advisors	Palatine, IL	698,110.34
308 Linscomb & Williams	Houston, TX	830,496.70	358 Cooper, Jones & McLeland	Fairfax, VA	689,822.79
309 Gordon Asset Management	Durham, NC	830,246.67	359 Sather Financial Group	Victoria, TX	683,553.53
310 Larry Heller & Associates	Melville, NY	827,038.76	360 Donald W. Nicholson & Associates	Wilmington, DE	683,436.39
311 Focus Financial Advisors	Rockford, IL	825,846.78	361 Family Financial Architects	Natick, MA	674,871.69
312 The Darrow Company	Concord, MA	824,129.45	362 Horan Capital Management	Towson, MD	670,033.67
313 NetWorth Investment Advisors	McMurray, PA	821,385.10	363 Grunden Financial Advisory	Denton, TX	650,329.67
314 Burns Matteson Capital Management	Corning, NY	819,238.22	364 Asset Management Group	Stamford, CT	649,631.41
315 Barnes Investment Advisory	Phoenix, AZ	819,177.68	365 Harris Financial Advisors	Torrance, CA	645,007.94
316 Staton Financial Advisors	Charlotte, NC	818,181.82	366 John G. Ullman & Associates	Corning, NY	637,755.10
317 Enright Premier Wealth Advisors	Torance, CA	815,533.98	367 Financial Connections Group	Berkeley, CA	635,202.31
318 Parsec Financial Management	Asheville, NC	810,347.32	368 Polaris Equity Management	Mill Valley, CA	626,666.67
319 Valley National Advisers	Bethlehem, PA	808,788.57	369 Waller Financial Planning Group	Columbus, OH	625,359.05
320 Ritter Daniher Financial Advisory	Cincinnati, OH	806,906.89	370 Halpern Financial	Rockville, MD	615,897.61
321 RPH Financial Services	Sciota, PA	801,034.71	371 Petersen Hastings Investment Mgmt.	Kennewick, WA	614,538.56
322 Lexington Wealth Management	Lexington, MA	800,000.00	372 DiNuzzo Investment Advisors	Beaver, PA	614,506.42
323 Matrix Wealth Advisors	Charlotte, NC	797,047.62	373 McBrearty Capital Management	Knoxville, TN	607,583.66
324 Asset Planning Corporation	Knoxville, TN	792,504.18	374 WebsterRogers Financial Advisors	Florence, SC	606,520.28
325 Crescent Sterling	Metairie, LA	791,926.04	375 Hoffman and Hock	Phoenix, AZ	605,149.56
326 Asset Strategies	Casper, WY	790,296.00	376 Hoxton Financial	Shepherdstown, WV	598,651.07
327 Strategic Wealth Management Group	Columbia, MD	781,688.27	377 Spraker, Fitzgerald, Tamayo & Moisand	Maitland, FL	590,653.14
328 Peak Financial Advisors	Denver, CO	779,464.62	378 Grant Koehler & Levin LTD	Mequon, WI	584,949.37
329 The Copeland Grp. Financial Advisors	Redlands, CA	777,070.06	379 Macke Financial Advisory Group	Fort Myers, FL	577,079.05
330 Capital Performance Advisors	Walnut Creek, CA	771,039.72	380 WS Investment Advisors	Greenwood Village, CO	575,709.34
331 JWA Financial Group	Dallas, TX	770,326.22	381 Bedrock Capital Management	Los Altos, CA	571,153.85
332 Curran & Lewis Investment Mgmt.	Menlo Park, CA	762,252.91	382 HBK Sorce Advisory	Erie, PA	570,629.37
333 Professional Asset Strategies	Birmingham, AL	759,880.27	383 Ferguson Asset Management	Potomac, MD	570,214.31
334 Wheeler/Frost Associates	San Diego, CA	759,704.70	384 Rodgers & Associates	Lancaster, PA	568,035.88
335 Essential Financial Planning	Albuquerque, NM	757,085.24	385 Vintage Financial Services	Ann Arbor, MI	555,050.51
336 Herbein Wealth Management	Wyomissing, PA	756,300.82	386 Mutual Fund Management Co.	Troy, MI	543,537.30
337 Private Wealth Advisors	Pittsburgh, PA	755,582.39	387 Tisch Investment Advisory	Ann Arbor, MI	534,295.96
338 Professional Financial Strategies	Pittsford, NY	754,781.91	388 Brown Financial Advisory	Fairhope, AL	531,287.47
339 Professional Financial Advisors	Media, PA	740,359.22	389 Rench & Muir Financial Advisors	Denton, TX	530,189.97
340 Leonetti & Associates	Buffalo Grove, IL	740,000.00	390 Searcy Financial Services	Overland Park, KS	523,661.68
341 Otto & Associates	Katonah, NY	736,136.20	391 Reilly Financial Advisors	La Mesa, CA	518,292.68
342 Meridian Capital Management	Los Alamitos, CA	735,714.29	392 LifePlan Financial Group	Dayton, OH	513,024.55
343 Financial Management Concepts	Winter Springs, FL	733,823.61	393 Phil A. Younker & Associates	Fairbanks, AK	511,363.64
344 M.D. Kresh Financial Services	Islandia, NY	733,695.65	394 Investor Resources	Port Orchard, WA	506,168.05
345 Lenox Advisors	New York, NY	733,333.33	395 Financial Planning and Info. Services	De Pere, WI	503,662.70
346 Savant Capital Management	Rockford, IL	732,583.98	396 Sequoia Financial Advisors	Akron, OH	501,187.65
347 Harold C. Brown & Co.	Buffalo, NY	722,255.29	397 Grimes & Company	Westborough, MA	500,000.00
348 The Baron Financial Group	Fair Lawn, NJ	722,222.22	398 Horowitz & Company	Weston, FL	496,000.00
349 Kenneth Frenke & Co.	Arden, NC	720,338.98	399 Clifton Gunderson Financial Advisors	Madison, WI	495,524.01
350 Capital Advisory Group	Dallas, TX	714,002.29	400 Maul Capital Management	Las Vegas, NV	495,057.74



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Rank/Firm	Location	Avg. client relationship	Rank/Firm	Location	Avg. client relationship
401 Affinity Wealth Management	Wilmington, DE	\$487,381.54	421 Retirement Investment Advisors	Oklahoma City, OK	\$376,344.09
402 Stabil Capital Management	Houston, TX	479,765.46	422 Edelman Financial Services	Fairfax, VA	373,392.34
403 Glenn Woody Financial Consultants	Costa Mesa, CA	479,061.74	423 StrategicPoint Investment Advisors	Providence, RI	355,864.13
404 Sheaff Brock Investment Advisors	Indianapolis, IN	475,239.29	424 Rochester Financial Services	Pittsford, NY	355,164.85
405 RMR Financial Advisors	Madison, WI	474,648.54	425 Lindahl & Mansager	Fairlawn, OH	349,798.03
406 Chas. P. Smith & Associates	Lakeland, FL	473,471.03	426 Mark J Snyder Financial Services	Medford, NY	328,767.12
407 MK Brown and Assoc.	Dayton, OH	461,538.46	427 Linda A. Barlow	Santa Ana, CA	325,427.43
408 McCarthy Asset Management	Redwood Shores, CA	461,514.83	428 Jacob Gold & Associates	Phoenix, AZ	300,000.00
409 Schroeder, Braxton & Vogt	Amherst, NY	460,923.27	429 Financial Network Corporation	Atlanta, GA	299,485.86
410 Pinnacle Investment Management	Simsbury, CT	450,347.66	430 WFA Asset Management Corporation	Franklin, WI	297,560.98
411 Investor's Capital Management	Menlo Park, CA	448,085.11	431 New Century Financial Group	Princeton, NJ	288,656.01
412 William Mack & Associates	Troy, MI	447,653.43	432 Tilson Financial Group	Watchung, NJ	287,878.79
413 CCP	Palatine, IL	438,000.00	433 F.I.G. Financial Advisory Services	Edmond, OK	286,408.42
414 Cameron Thornton Associates	Burbank, CA	434,083.33	434 Smith Rapacz	Boston, MA	283,662.69
415 Independent Service Co.	Albert Lea, MN	432,955.63	435 Legacy Financial Group	Torrance, CA	263,333.33
416 Capital Investment Advisors	Atlanta, GA	403,738.32	436 First Affirmative Financial Network	Colorado Springs, CO	215,052.41
417 Dion Money Management	Williamstown, MA	397,349.59	437 Traphagen Investment Advisors	Oradell, NJ	204,120.74
418 Lindner Capital Advisors	Marietta, GA	397,011.66	438 FLC Capital Advisors	Palm Desert, CA	190,762.87
419 Hinsdale Associates	Hinsdale, IL	380,952.38	439 Regatta Research & Money Mgmt.	Metairie, LA	143,844.09
420 The H Group	Portland, OR	378,181.82			

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Accredited Investors	157	Bernhardt Wealth Management	274	CFSE Wealth Management	202	Evensky & Katz	95
ACG Advisory Services	20	Berno Financial Management	235	Charles D. Haines	110	F&D Advisors	94
Acropolis Investment Management	113	BHCO Capital Management	182	Chas. P. Smith & Associates	406	F.I.G. Financial Advisory Services	433
Aegis Wealth Management	26	Bingham, Osborn & Scarborough	98	Clarfeld Financial Advisors	27	Fairman Group	133
Affinity Wealth Management	401	Blankinship & Foster	229	Clifton Gunderson Financial Advisors	399	Fairway Wealth Management	46
Albion Financial Group	135	Blume Capital Management	245	CMC Advisers	238	Family Financial Architects	361
Alexander Randolph Advisory	198	Braver Wealth Management		Coldstream Capital Management	178	Ferguson Asset Management	383
Alexandria Financial Associates		(formerly Tandem Financial Services)	259	Colman Knight Advisory Group	190	FFR Advisory	120
(Botree Asset Management)	295	Brian Puckett Retirement Advisors	244	Columbia Asset Management	124	Fieldstone Financial Management Group	75
Altair Advisers	24	Briaud Financial Planning	170	Cookson, Peirce & Co.	125	Financial Advantage	189
Altavista Wealth Management	101	Briggs Wealth Management	220	Cooper, Jones & McLeland	358	Financial Advisory Service	215
American Economic Planning Group	236	Brightworth	92	Copeland Group Financial Advisors	329	Financial Clarity	12
AMI Investment Management	49	Brinton Eaton Associates	119	Cornestone Capital Advisors	194	Financial Connections Group	367
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