

FA's 2025
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TOP 50

Firms with more than \$500 million in AUM.

FASTEST-GROWING FIRMS

Commonwealth

GROWTH RANK	FIRM NAME	LOCATION	2024 CLIENTS	YEAR END 2024 ASSETS (\$MM)*	% GROWTH IN ASSETS 2023-2024	% GROWTH IN ASSETS PER CLIENT
1	Focus Partners Wealth	Boston, Mass.	34,999	95,889.89	346.57%	-28.75%
2	Fortis Capital Advisors	Prairie Village, Kan.	1,217	1,034.89	226.50%	17.24%
3	Kovitz Investment Group Partners §	Chicago, Ill.	11,970	31,731.80	181.04%	-42.31%
4	Kingswood Wealth Advisors	San Diego, Calif.	9,055	2,470.94	154.90%	N/A
5	Compound Planning	New York City, N.Y.	2,352	3,025.36	116.72%	99.49%
6	Duncan Williams Asset Management	Memphis, Tenn.	1,966	2,163.09	111.64%	-35.52%
7	Pathstone	Englewood, N.J.	2,129	100,444.14	108.14%	85.46%
8	Confluence Financial Partners	McMurray, Pa.	2,022	5,454.18	78.50%	28.01%
9	Arista Wealth Management	Las Vegas, Nev.	443	1,028.54	65.57%	43.52%
10	Palumbo Wealth Management	Great Neck, N.Y.	264	600.02	61.57%	41.98%
11	Waverly Advisors	Birmingham, Ala.	10,085	16,130.19	60.37%	-33.21%
12	Clearstead Advisors	Cleveland, Ohio	4,797	24,294.18	58.56%	-50.39%
13	CliftonLarsonAllen Wealth Advisors	Minneapolis, Minn.	7,000	12,327.82	54.53%	45.70%
14	Dash Investments	Woodland Hills, Calif.	450	600.00	53.85%	2.56%
15	Virtue Capital Management	Brentwood, Tenn.	7,455	1,208.39	53.45%	25.79%
16	Cerity Partners	New York, N.Y.	37,741	122,848.69	52.47%	14.28%
17	Prosperity Capital Advisors ¶¶	Westlake, Ohio	7,096	3,684.97	52.29%	0.18%
18	MAI Capital Management	Cleveland, Ohio	12,411	29,060.28	50.95%	-0.01%
19	Klingman & Associates	New York, N.Y.	661	4,836.52	47.60%	37.55%
20	Berger Financial Group	Plymouth, Minn.	3,000	2,500.00	47.06%	91.18%
21	Larson Financial Group	St. Louis, Mo.	18,000	4,032.74	46.92%	14.27%
22	Caprock	Boise, Idaho	408	10,149.33	46.63%	13.93%
23	Heck Capital Advisors	Rhineland, Wis.	1,160	9,670.50	45.29%	54.05%
24	Robertson Stephens Wealth Management	San Francisco, Calif.	2,053	7,139.38	44.75%	-15.68%
25	Perigon Wealth Management	San Francisco, Calif.	4,961	6,940.95	43.69%	8.47%
26	Financial Synergies Wealth Advisors	Houston, Texas	838	1,566.37	43.55%	34.30%
27	Winthrop Wealth	Boston, Mass.	2,117	2,600.89	42.07%	-9.47%
28	Mission Wealth Management	Santa Barbara, Calif.	3,632	10,024.06	41.72%	14.84%
29	Red Door Wealth Management	Memphis, Tenn.	810	2,520.52	40.70%	17.25%
30	Falcon Wealth Planning	Ontario, Calif.	1,950	1,159.54	40.41%	8.01%
31	Sax Wealth Advisors	Parsippany, N.J.	1,205	2,440.85	40.32%	9.70%
32	Callan Family Office	Radnor, Pa.	47	6,669.55	39.89%	63.70%
33	Credent Wealth Management	Auburn, Ind.	3,437	3,338.00	39.84%	10.18%
34	Condor Capital Wealth Management	Martinsville, N.J.	800	1,996.41	39.65%	44.72%
35	AE Wealth Management **	Topeka, Kan.	114,837	37,525.71	38.56%	17.78%
36	Aspen Wealth Management	Fort Worth, Texas	328	509.58	38.50%	20.76%
37	AITi Tiedemann Global	New York, N.Y.	436	29,043.17	38.47%	29.57%
38	Coldstream Wealth Management	Bellevue, Wash.	3,769	10,461.13	38.03%	-19.80%
39	Versant Capital Management	Phoenix, Ariz.	540	1,239.09	37.60%	23.59%
40	Evolution Wealth Advisors	Aventura, Fla.	356	1,310.13	37.58%	15.94%
41	Team Hewins	Redwood City, Calif.	531	3,433.22	37.23%	30.25%
42	Composition Wealth	Los Angeles, Calif.	2,950	6,714.19	37.14%	-2.23%
43	Premier Path Wealth Partners	Madison, N.J.	752	1,104.98	35.67%	N/A
44	Fiduciary Pension Partners	Westfield, N.J.	140	1,709.79	34.68%	15.44%
45	CW Advisors	Boston, Mass.	3,296	9,301.98	34.41%	-1.23%
46	True North Advisors	Dallas, Texas	763	4,478.25	34.03%	0.83%
47	Creative Planning †	Overland Park, Kan.	107,690	234,610.38	33.86%	-5.51%
48	CAPTRUST Financial Advisors	Raleigh, N.C.	36,839	1,083,051.01	33.68%	15.46%
49	Performance Wealth	Hinsdale, Ill.	832	3,387.12	32.99%	19.08%
50	Mercer Advisors	Denver, Colo.	32,800	60,256.27	32.87%	25.44%

**2024 AUM is as of 2/2025. †AUM represents all assets of Creative Planning Holding Company, which includes Creative Planning and United Capital. §2024 AUM is as March 2025. ¶¶C2P Capital Advisor Group doing business as Prosperity Capital Advisors.

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FA's 2025 RIA RANKING

Commonwealth

2024 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2024 ASSETS (\$MM)*	% GROWTH IN ASSETS 2023-2024	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
ASSET CATEGORY: 1 BILLION AND OVER							
1	CAPTRUST Financial Advisors	Raleigh, N.C.	1,083,051.01	33.68%	29.40	15.46%	15.78%
2	Edelman Financial Engines	Boston, Mass.	292,902.97	8.17%	0.23	9.01%	-0.77%
3	SageView Advisory Group	Newport Beach, Calif.	238,552.02	17.76%	50.15	12.88%	4.32%
4	Creative Planning †	Overland Park, Kan.	234,610.38	33.86%	2.18	-5.51%	41.67%
5	Hightower Advisors	Chicago, Ill.	164,789.47	26.53%	2.99	7.26%	17.96%
6	Corient ¶	Miami, Fla.	143,628.53	21.52%	5.98	N/A	N/A
7	Cerity Partners	New York, N.Y.	122,848.69	52.47%	3.26	14.28%	33.42%
8	Pathstone	Englewood, N.J.	100,444.14	108.14%	47.18	85.46%	12.23%
9	Focus Partners Wealth	Boston, Mass.	95,889.89	346.57%	2.74	-28.75%	526.77%
10	Wealth Enhancement Advisory Services	Plymouth, Minn.	94,632.03	31.39%	1.34	11.54%	17.79%
11	Fiducient Advisors	Chicago, Ill.	67,638.98	21.01%	101.41	14.66%	5.54%
12	CIBC Private Wealth Advisors	Atlanta, Ga.	61,112.97	10.50%	6.08	-1.05%	11.67%
13	Mercer Advisors	Denver, Colo.	60,256.27	32.87%	1.84	25.44%	5.92%
14	Cresset Asset Management ††	Chicago, Ill.	52,506.64	28.91%	17.15	58.98%	-18.91%
15	Innovest Portfolio Solutions ††	Denver, Colo.	50,616.98	11.74%	114.52	-4.19%	16.62%
16	Kayne Anderson Rudnick Investment Mgmt.	Los Angeles, Calif.	45,493.86	10.46%	1.66	13.06%	-2.30%
17	Moneta	St. Louis, Mo.	42,795.58	14.18%	5.34	5.11%	8.63%
18	Beacon Pointe Advisors	Newport Beach, Calif.	39,839.76	27.37%	1.81	-13.16%	46.67%
19	AE Wealth Management **	Topeka, Kan.	37,525.71	38.56%	0.33	17.78%	17.65%
20	Silvercrest Asset Management Group	New York, N.Y.	36,454.73	9.54%	43.82	9.93%	-0.36%
21	First Manhattan Co.	New York, N.Y.	34,439.57	8.21%	12.51	9.00%	-0.72%
22	Kovitz Investment Group Partners §	Chicago, Ill.	31,731.80	181.04%	2.65	-42.31%	387.18%
23	Wealthspire Advisors	New York, N.Y.	29,298.36	15.94%	3.08	11.26%	4.21%
24	Savant Wealth Management	Rockford, Ill.	29,094.58	19.25%	1.73	15.78%	3.00%
25	MAI Capital Management	Cleveland, Ohio	29,060.28	50.95%	2.34	-0.01%	50.97%
26	AITi Tiedemann Global	New York, N.Y.	29,043.17	38.47%	66.61	29.57%	6.86%
27	Evoke Advisors	Los Angeles, Calif.	27,695.49	5.56%	30.01	-3.71%	9.62%
28	Steward Partners	New York, N.Y.	26,873.41	25.01%	0.97	11.01%	12.62%
29	Allworth Financial	Folsom, Calif.	25,097.13	29.94%	0.87	4.14%	24.78%
30	Clearstead Advisors	Cleveland, Ohio	24,294.18	58.56%	5.06	-50.39%	219.59%
31	1919 Investment Counsel	Baltimore, Md.	23,984.81	12.84%	12.21	13.47%	-0.56%
32	Johnson Investment Counsel	Cincinnati, Ohio	20,872.14	12.16%	4.07	7.52%	4.32%
33	Oxford Financial Group	Carmel, Ind.	19,650.38	7.96%	28.94	11.62%	-3.28%
34	Newport Capital Group	Red Bank, N.J.	18,953.44	14.72%	86.15	11.07%	3.29%
35	Homrich Berg	Atlanta, Ga.	18,591.40	22.32%	4.39	15.82%	5.61%
36	Choreo	Rockford, Ill.	18,232.36	13.73%	2.52	7.64%	5.66%
37	RWA Wealth Partners	Newton, Mass.	17,255.24	11.88%	2.81	17.03%	-4.40%
38	Waverly Advisors	Birmingham, Ala.	16,130.19	60.37%	1.60	-33.21%	140.12%
39	Aspiriant	Los Angeles, Calif.	15,532.93	4.73%	6.87	2.83%	1.85%
40	Modera Wealth Management	Westwood, N.J.	15,510.48	23.76%	2.54	5.40%	17.42%
41	WE Family Offices	Coral Gables, Fla.	15,364.80	10.46%	143.60	11.50%	-0.93%
42	myCIO Wealth Partners	Philadelphia, Pa.	14,415.67	11.16%	15.88	9.20%	1.79%
43	Evercore Wealth Management	New York, N.Y.	13,898.60	13.26%	18.48	10.40%	2.59%
44	Appleton Partners	Boston, Mass.	13,452.68	6.30%	1.81	2.07%	4.14%
45	Mason Investment Advisory Service	Reston, Va.	13,204.25	8.63%	11.90	0.51%	8.08%
46	Investment Research & Advisory Group	Atlanta, Ga.	13,197.61	14.78%	46.47	9.93%	4.41%
47	CV Advisors	Aventura, Fla.	12,855.52	32.83%	102.03	23.34%	7.69%
48	CliftonLarsonAllen Wealth Advisors	Minneapolis, Minn.	12,327.82	54.53%	1.76	45.70%	6.06%
49	Gresham Partners	Chicago, Ill.	11,650.77	12.22%	94.72	7.66%	4.24%

*Average assets per client relationship. **2024 AUM is as of February 2025. † AUM represents all assets of Creative Planning Holding Company, which includes Creative Planning and United Capital. ††2024 AUM is as November 2024. †††2024 AUM are assets under advisement. §2024 AUM is as March 2025. §§Cary Street Partners Financial is the parent company to Cary Street Partners Investment Advisory.

¶AUM includes assets managed by Corient, and firms in which Corient has an investment. Not all assets are considered regulatory assets as defined by their Form ADV. ¶¶C2P Capital Advisor Group doing business as Prosperity Capital Advisors. †††Formerly SBK Financial. ††††BTFM dba Buffington Mohr McNeal. §§§Firm started in January 2024.

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 Commonwealth

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50	Williams Jones Wealth Management	New York, N.Y.	11,618.86	9.94%	7.56	4.14%	5.57%
51	Freestone Capital Management	Seattle, Wash.	11,493.62	20.63%	4.02	10.50%	9.17%
52	Sentinel	Wakefield, Mass.	10,730.23	19.07%	4.51	9.82%	8.42%
53	Coldstream Wealth Management	Bellevue, Wash.	10,461.13	38.03%	2.78	-19.80%	72.10%
54	Brookstone Capital Management	Wheaton, Ill.	10,409.14	17.72%	0.19	11.14%	5.91%
55	Caprock	Boise, Idaho	10,149.33	46.63%	24.88	13.93%	28.71%
56	Mission Wealth Management	Santa Barbara, Calif.	10,024.06	41.72%	2.76	14.84%	23.41%
57	Curi RMB Capital	Chicago, Ill.	9,830.68	15.87%	3.10	-5.77%	22.97%
58	Heck Capital Advisors	Rhineland, Wis.	9,670.50	45.29%	8.34	54.05%	-5.69%
59	Advisors Capital Management	Ridgewood, N.J.	9,470.06	27.29%	1.30	10.69%	14.99%
60	Bartlett Wealth Management	Cincinnati, Ohio	9,391.24	11.26%	4.16	15.50%	-3.67%
61	CW Advisors	Boston, Mass.	9,301.98	34.41%	2.82	-1.23%	36.09%
62	Conrad Siegel Investment Advisors	Harrisburg, Pa.	9,036.30	16.22%	18.18	10.61%	5.07%
63	Forum Financial Management	Lombard, Ill.	9,030.64	5.85%	1.63	1.07%	4.73%
64	Ferguson Wellman Capital Management	Portland, Ore.	8,992.35	7.13%	8.76	3.37%	3.64%
65	Choate Investment Advisors	Boston, Mass.	8,875.55	18.39%	13.51	13.34%	4.45%
66	Tolleson Wealth Management	Dallas, Texas	8,759.00	6.52%	43.80	8.65%	-1.96%
67	Soltis Investment Advisors	St. George, Utah	8,352.55	22.44%	1.83	5.07%	16.53%
68	Cornerstone Advisors Asset Management	Bethlehem, Pa.	8,299.03	11.90%	17.22	7.02%	4.56%
69	Cary Street Partners Financial §§	Richmond, Va.	8,263.89	18.44%	1.41	5.93%	11.81%
70	Joel Isaacson & Co.	New York, N.Y.	8,039.01	16.60%	6.46	14.17%	2.13%
71	Pure Financial Advisors §	San Diego, Calif.	8,023.23	27.50%	1.28	-14.89%	49.81%
72	SignatureFD	Atlanta, Ga.	8,000.76	14.25%	4.39	11.12%	2.82%
73	Shuster Advisory Group	Pasadena, Calif.	7,909.38	25.86%	22.09	8.28%	16.23%
74	F.L.Putnam Investment Management Co.	Lynnfield, Mass.	7,695.90	24.77%	3.00	0.19%	24.54%
75	Bradley, Foster & Sargent	Hartford, Conn.	7,676.52	12.09%	4.43	7.24%	4.53%
76	Plancorp	St. Louis, Mo.	7,295.03	12.58%	4.68	12.29%	0.26%
77	Robertson Stephens Wealth Management	San Francisco, Calif.	7,139.38	44.75%	3.48	-15.68%	71.66%
78	Crestwood Advisors Group	Boston, Mass.	7,015.99	23.26%	6.12	19.49%	3.15%
79	Perigon Wealth Management	San Francisco, Calif.	6,940.95	43.69%	1.40	8.47%	32.47%
80	HBKS Wealth Advisors	Erie, Pa.	6,854.98	23.06%	1.09	17.25%	4.96%
81	Ingalls & Snyder	New York, N.Y.	6,799.93	21.56%	1.62	19.44%	1.77%
82	Simon Quick Advisors	Morristown, N.J.	6,717.00	16.76%	8.36	9.78%	6.36%
83	Composition Wealth	Los Angeles, Calif.	6,714.19	37.14%	2.28	-2.23%	40.28%
84	Callan Family Office	Radnor, Pa.	6,669.55	39.89%	141.91	63.70%	-14.55%
85	Zhang Financial	Portage, Mich.	6,547.69	14.31%	3.40	23.08%	-7.13%
86	Gradient Investments	Arden Hills, Minn.	6,513.11	23.63%	0.27	13.59%	8.84%
87	Bailard	Foster City, Calif.	6,400.35	10.16%	6.12	-2.90%	13.45%
88	Axxcess Wealth Management	Carlsbad, Calif.	6,329.40	-2.18%	0.73	20.38%	-18.74%
89	Procyon Partners	Shelton, Conn.	6,278.72	27.10%	4.19	1.68%	25.00%
90	Cassaday & Company	McLean, Va.	5,982.80	20.26%	1.87	13.98%	5.50%
91	Badgley Phelps Wealth Managers	Seattle, Wash.	5,902.78	15.15%	5.38	8.75%	5.88%
92	Grimes & Company	Westborough, Mass.	5,592.56	15.30%	1.51	11.82%	3.11%
93	Kovack Advisors	Fort Lauderdale, Fla.	5,533.51	29.05%	0.39	10.39%	16.91%
94	Confluence Financial Partners	McMurray, Pa.	5,454.18	78.50%	2.70	28.01%	39.45%
95	Truepoint Wealth Counsel	Cincinnati, Ohio	5,391.47	9.24%	2.95	8.34%	0.83%
96	Index Fund Advisors	Irvine, Calif.	5,329.17	7.55%	2.22	8.85%	-1.19%
97	Westmount Partners	Los Angeles, Calif.	5,202.68	22.15%	3.46	19.31%	2.38%
98	Carnegie Investment Counsel	Pepper Pike, Ohio	5,153.82	14.03%	1.88	14.82%	-0.69%
99	Crescent Grove Advisors	Lake Forest, Ill.	4,996.27	12.15%	13.11	5.67%	6.13%

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100	PermCap Investment Office	Charleston, S.C.	4,932.48	10.52%	107.23	0.91%	9.52%
101	Pension Consultants	Springfield, Mo.	4,921.82	10.69%	66.51	3.21%	7.25%
102	Allegheny Financial Group	Pittsburgh, Pa.	4,904.13	9.66%	1.24	0.68%	8.92%
103	SYM Financial Advisors	Winona Lake, Ind.	4,879.62	20.32%	2.70	10.95%	8.45%
104	TFO Wealth Partners	Maumee, Ohio	4,852.79	23.40%	2.96	20.25%	2.63%
105	Klingman & Associates	New York, N.Y.	4,836.52	47.60%	7.32	37.55%	7.31%
106	Mayflower Advisors	Boston, Mass.	4,779.43	2.22%	4.67	-4.37%	6.89%
107	Moran Wealth Management	Naples, Fla.	4,743.61	11.17%	2.33	1.45%	9.58%
108	Klingenstein Fields Advisors	New York, N.Y.	4,737.30	3.21%	9.59	8.85%	-5.18%
109	Constellation Wealth Advisors	Cincinnati, Ohio	4,661.73	19.53%	18.21	16.73%	2.40%
110	TCI Wealth Advisors	Tucson, Ariz.	4,527.18	10.64%	1.43	3.47%	6.94%
111	Advance Capital Management	Southfield, Mich.	4,504.45	11.95%	0.64	10.43%	1.38%
112	True North Advisors	Dallas, Texas	4,478.25	34.03%	5.87	0.83%	32.93%
113	Chicago Capital	Chicago, Ill.	4,477.49	27.00%	5.92	14.57%	10.85%
114	Baker Tilly Wealth Management	Madison, Wis.	4,425.86	-7.80%	7.43	49.59%	-38.37%
115	Hamilton Capital	Columbus, Ohio	4,381.86	3.84%	1.53	1.02%	2.80%
116	Brownson, Rehms & Foxworth	Chicago, Ill.	4,270.99	6.08%	16.55	5.25%	0.78%
117	Palisade Capital Management	Fort Lee, N.J.	4,225.94	-0.41%	2.16	0.81%	-1.21%
118	Sowell Management	North Little Rock, Ark.	4,223.38	27.88%	0.40	0.00%	27.88%
119	Heritage Investors Management Corp. §	Bethesda, Md.	4,180.78	14.11%	5.48	13.81%	0.26%
120	TFO Family Office Partners	Phoenix, Ariz.	4,167.48	8.98%	14.27	-3.34%	12.74%
121	Mainstay Capital Management	Grand Blanc, Mich.	4,167.23	12.10%	1.21	15.84%	-3.23%
122	Clifford Swan Investment Counselors	Pasadena, Calif.	4,143.00	7.67%	4.42	8.36%	-0.64%
123	Larson Financial Group	St. Louis, Mo.	4,032.74	46.92%	0.22	14.27%	28.57%
124	Finaccess Advisors	Miami, Fla.	4,021.35	-0.63%	39.04	-2.56%	1.98%
125	JFS Wealth Advisors	Hermitage, Pa.	4,005.13	18.17%	1.79	13.36%	4.24%
126	IFG Advisory	Atlanta, Ga.	3,972.45	22.14%	0.46	11.92%	9.13%
127	Bragg Financial Advisors	Charlotte, N.C.	3,904.37	14.03%	9.88	16.05%	-1.74%
128	Sand Hill Global Advisors	Palo Alto, Calif.	3,880.43	12.68%	7.08	10.42%	2.05%
129	Greenspring Advisors	Towson, Md.	3,775.32	-45.26%	2.91	-46.90%	3.10%
130	Schechter Wealth	Birmingham, Mich.	3,749.04	31.68%	4.48	13.57%	15.95%
131	Wescott Financial Advisory Group	Philadelphia, Pa.	3,725.00	10.08%	6.77	5.07%	4.76%
132	Accredited Investors Wealth Management	Edina, Minn.	3,715.19	10.59%	4.12	-26.68%	50.84%
133	Prosperity Capital Advisors ¶¶	Westlake, Ohio	3,684.97	52.29%	0.52	0.18%	52.01%
134	Sage Financial Group	Conshohocken, Pa.	3,624.13	12.78%	3.42	6.71%	5.68%
135	Foster Group	West Des Moines, Iowa	3,543.00	9.40%	1.93	9.46%	-0.05%
136	Halbert Hargrove Global Advisors	Long Beach, Calif.	3,516.42	11.20%	3.79	3.18%	7.77%
137	Team Hewins	Redwood City, Calif.	3,433.22	37.23%	6.47	30.25%	5.36%
138	Henssler Financial	Kennesaw, Ga.	3,403.22	13.22%	1.94	13.22%	0.00%
139	Performance Wealth	Hinsdale, Ill.	3,387.12	32.99%	4.07	19.08%	11.68%
140	Capital Wealth Advisors **	Naples, Fla.	3,340.66	31.95%	1.94	20.83%	9.21%
141	Credent Wealth Management	Auburn, Ind.	3,338.00	39.84%	0.97	10.18%	26.92%
142	MCF Advisors	Lexington, Ky.	3,329.35	15.40%	3.23	8.69%	6.17%
143	The Welch Group	Birmingham, Ala.	3,212.01	16.39%	2.35	14.00%	2.09%
144	Burney Company	Reston, Va.	3,136.98	17.10%	1.63	17.10%	0.00%
145	Certuity	North Palm Beach, Fla.	3,100.03	-21.75%	6.33	-7.54%	-15.37%
146	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	3,099.98	21.28%	1.55	-21.80%	55.07%
147	Heritage Financial Services	Westwood, Mass.	3,063.94	15.13%	2.45	10.99%	3.73%
148	FAS Wealth Partners	Leawood, Kan.	3,058.86	14.57%	2.05	8.42%	5.67%
149	Wealthcare Capital Management	Richmond, Va.	3,030.88	3.90%	0.60	-5.43%	9.87%

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 Commonwealth

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150	Compound Planning	New York City, N.Y.	3,025.36	116.72%	1.29	99.49%	8.64%
151	AlphaCore Wealth Advisory	La Jolla, Calif.	3,003.21	22.98%	1.89	1.82%	20.79%
152	Bogart Wealth	McLean, Va.	2,989.08	13.33%	2.08	6.56%	6.35%
153	Morton Wealth	Calabasas, Calif.	2,956.33	11.77%	2.50	7.51%	3.96%
154	Schneider Downs Wealth Management	Pittsburgh, Pa.	2,912.31	11.38%	3.85	14.32%	-2.58%
155	Inspire Investing	Meridian, Idaho	2,856.92	11.50%	5.55	3.92%	7.29%
156	Chesley, Taft & Associates	Chicago, Ill.	2,794.83	16.27%	7.08	13.03%	2.86%
157	BLBB Advisors	Montgomeryville, Pa.	2,739.76	19.21%	1.81	5.21%	13.31%
158	GHP Investment Advisors	Denver, Colo.	2,723.13	11.76%	2.28	4.55%	6.90%
159	Greenwich Wealth Management	Greenwich, Conn.	2,710.65	23.96%	9.41	38.16%	-10.28%
160	Stokes Family Office	New Orleans, La.	2,685.45	28.06%	3.85	22.19%	4.80%
161	Retirement Income Solutions	Ann Arbor, Mich.	2,656.77	9.70%	2.10	9.62%	0.08%
162	CPS Investment Advisors	Lakeland, Fla.	2,656.29	12.87%	0.81	16.45%	-3.08%
163	Birch Hill Investment Advisors	Boston, Mass.	2,654.30	11.09%	13.97	12.26%	-1.04%
164	Fairway Wealth Management	Independence, Ohio	2,606.59	10.61%	8.90	4.19%	6.16%
165	Winthrop Wealth	Boston, Mass.	2,600.89	42.07%	1.23	-9.47%	56.93%
166	West Financial Services	McLean, Va.	2,574.62	19.06%	2.80	15.30%	3.26%
167	Foster & Motley	Cincinnati, Ohio	2,537.32	11.95%	3.11	16.20%	-3.66%
168	Parcion Private Wealth	Bellevue, Wash.	2,531.53	15.42%	17.70	2.51%	12.60%
169	SJS Investment Services	Sylvania, Ohio	2,526.31	12.82%	2.54	2.73%	9.82%
170	SFMG Wealth Advisors	Plano, Texas	2,524.71	12.27%	2.81	10.77%	1.35%
171	Red Door Wealth Management	Memphis, Tenn.	2,520.52	40.70%	3.11	17.25%	20.00%
172	Berger Financial Group	Plymouth, Minn.	2,500.00	47.06%	0.83	91.18%	-23.08%
173	Kingswood Wealth Advisors	San Diego, Calif.	2,470.94	154.90%	0.27	N/A	N/A
174	Bedel Financial Consulting	Indianapolis, Ind.	2,470.73	15.60%	2.22	12.79%	2.48%
175	Capstone Financial Advisors	Downers Grove, Ill.	2,441.94	15.37%	3.75	7.04%	7.78%
176	Sax Wealth Advisors	Parsippany, N.J.	2,440.85	40.32%	2.03	9.70%	27.92%
177	Zemenick & Walker	St. Louis, Mo.	2,429.56	8.74%	9.49	4.06%	4.49%
178	RTD Financial	Philadelphia, Pa.	2,381.63	12.48%	3.21	6.56%	5.56%
179	CFS Investment Advisory Services	Totowa, N.J.	2,372.44	13.03%	4.13	10.08%	2.68%
180	Baltimore Washington Financial Advisors	Columbia, Md.	2,371.00	27.34%	1.75	14.99%	10.74%
181	Osborne Partners Capital Management	San Francisco, Calif.	2,358.84	8.71%	3.23	3.95%	4.58%
182	Legacy Wealth Management	Memphis, Tenn.	2,358.68	14.88%	1.67	9.77%	4.66%
183	Smith Salley Wealth Management	Greensboro, N.C.	2,344.19	-23.43%	2.28	-33.71%	15.52%
184	Colter Lewis Investment Partners	Greenwich, Conn.	2,320.93	18.34%	20.36	-3.46%	22.58%
185	LVW Advisors	Pittsford, N.Y.	2,281.80	6.73%	4.45	1.53%	5.12%
186	IPI Wealth Management	Decatur, Ill.	2,248.99	4.73%	0.52	3.02%	1.65%
187	Duncan Williams Asset Management	Memphis, Tenn.	2,163.09	111.64%	1.10	-35.52%	228.21%
188	Foster Victor	Greenville, S.C.	2,153.07	27.37%	1.34	17.18%	8.70%
189	Boulay Financial Advisors	Eden Prairie, Minn.	2,126.76	13.81%	1.78	8.76%	4.64%
190	RZH Advisors	Stamford, Conn.	2,121.08	23.46%	5.01	18.50%	4.19%
191	Diversified	Wilmington, Del.	2,041.48	31.39%	1.19	13.53%	15.73%
192	Condor Capital Wealth Management	Martinsville, N.J.	1,996.41	39.65%	2.50	44.72%	-3.50%
193	LBMC Investment Advisors	Brentwood, Tenn.	1,953.86	7.65%	3.96	4.82%	2.70%
194	Sather Financial Group	Victoria, Texas	1,948.91	13.09%	3.99	10.54%	2.31%
195	Abacus Planning Group	Columbia, S.C.	1,899.04	12.93%	6.25	6.61%	5.92%
196	Traphagen Investment Advisors	Oradell, N.J.	1,898.21	24.20%	0.97	11.43%	11.46%
197	DT Investment Partners	Chadds Ford, Pa.	1,887.96	24.37%	2.00	16.47%	6.79%
198	Albion Financial Group	Salt Lake City, Utah	1,858.12	16.30%	2.46	18.46%	-1.82%
199	ProVise Management Group	Clearwater, Fla.	1,804.31	-3.89%	1.53	16.50%	-17.50%

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200	PDS Planning	Dublin, Ohio	1,792.29	28.94%	2.95	27.24%	1.34%
201	Segment Wealth Management	Houston, Texas	1,756.99	24.60%	7.64	22.43%	1.77%
202	Conserve Capital Advisors	Wynnewood, Pa.	1,742.87	1.98%	5.85	-1.10%	3.11%
203	Fiduciary Pension Partners	Westfield, N.J.	1,709.79	34.68%	12.21	15.44%	16.67%
204	Cahaba Wealth Management	Atlanta, Ga.	1,641.23	9.68%	1.93	-13.03%	26.11%
205	Aveo Capital Partners	Englewood, Colo.	1,636.81	8.17%	1.12	0.45%	7.68%
206	Altfest Personal Wealth Management	New York, N.Y.	1,622.51	2.77%	2.70	1.06%	1.69%
207	Azzad Asset Management	Falls Church, Va.	1,616.06	8.28%	1.07	11.50%	-2.88%
208	Financial Synergies Wealth Advisors	Houston, Texas	1,566.37	43.55%	1.87	34.30%	6.89%
209	First Pacific Financial	Vancouver, Wash.	1,512.12	18.38%	1.27	-0.66%	19.16%
210	Weatherly Asset Management	Del Mar, Calif.	1,469.51	18.78%	3.94	15.59%	2.75%
211	Willis Johnson & Associates	Houston, Texas	1,419.97	21.62%	2.75	9.83%	10.73%
212	Rollins Financial Advisors	Atlanta, Ga.	1,382.59	30.02%	1.38	26.12%	3.09%
213	Destiny Wealth Partners	Tavares, Fla.	1,353.00	24.93%	1.57	35.08%	-7.51%
214	MJP Wealth Advisors	Farmington, Conn.	1,319.06	24.84%	1.59	22.29%	2.09%
215	Evolution Wealth Advisors	Aventura, Fla.	1,310.13	37.58%	3.68	15.94%	18.67%
216	Tanglewood Total Wealth Management	Houston, Texas	1,305.38	8.17%	3.06	11.46%	-2.95%
217	BigSur Wealth Management	Miami, Fla.	1,302.66	6.28%	52.11	-2.22%	8.70%
218	MG&A Wealth	Plantation, Fla.	1,300.00	18.18%	3.25	3.41%	14.29%
219	CJM Wealth Advisers	Falls Church, Va.	1,285.17	14.99%	1.21	-8.38%	25.50%
220	Archford Capital Strategies	Swansea, Ill.	1,278.99	31.65%	1.53	20.28%	9.45%
221	Petersen Hastings Wealth Advisors	Kennewick, Wash.	1,278.12	13.76%	1.13	2.40%	11.09%
222	Retirement Investment Advisors	Oklahoma City, Okla.	1,268.29	14.30%	0.92	10.49%	3.45%
223	Sargent Investment Group	Bethesda, Md.	1,267.67	22.61%	3.29	14.01%	7.54%
224	Pinkerton Wealth	Coeur d'Alene, Idaho	1,253.82	18.23%	1.60	13.41%	4.26%
225	Sheets Smith Wealth Management	Winston-Salem, N.C.	1,244.35	16.70%	3.03	1.94%	14.48%
226	Versant Capital Management	Phoenix, Ariz.	1,239.09	37.60%	2.29	23.59%	11.34%
227	Acorn Financial Advisory Services	Reston, Va.	1,234.54	11.21%	2.01	-1.08%	12.43%
228	Apriem Advisors	Irvine, Calif.	1,229.15	17.10%	1.27	3.07%	13.62%
229	Virtue Capital Management	Brentwood, Tenn.	1,208.39	53.45%	0.16	25.79%	21.99%
230	WealthCrossing †††	Richmond, Va.	1,203.98	6.09%	4.76	9.87%	-3.44%
231	Salomon & Ludwin	Richmond, Va.	1,200.00	-25.00%	2.70	-5.41%	-20.71%
232	The Planning Center	Moline, Ill.	1,186.88	9.10%	1.29	10.41%	-1.19%
233	Total Wealth Planning	Cincinnati, Ohio	1,178.15	11.63%	1.59	7.28%	4.06%
234	Falcon Wealth Planning	Ontario, Calif.	1,159.54	40.41%	0.59	8.01%	30.00%
235	Moisand Fitzgerald Tamayo	Orlando, Fla.	1,150.57	11.86%	1.30	8.06%	3.52%
236	Fermata Advisors	Sonoma, Calif.	1,145.26	17.60%	0.52	-7.28%	26.83%
237	Aspen Capital Management	Boise, Idaho	1,130.63	11.94%	3.77	-2.98%	15.38%
238	Rappaport Reiches Capital Management	Skokie, Ill.	1,130.00	21.51%	2.66	14.36%	6.25%
239	Premier Path Wealth Partners	Madison, N.J.	1,104.98	35.67%	1.47	N/A	N/A
240	Absher Wealth Management	Chapel Hill, N.C.	1,088.62	16.42%	2.42	9.95%	5.88%
241	Ullmann Wealth Partners	Jacksonville Beach, Fla.	1,074.43	22.50%	2.33	17.45%	4.30%
242	Vision Capital Management	Portland, Ore.	1,073.00	5.30%	1.80	2.65%	2.58%
243	Hemington Wealth Management	Falls Church, Va.	1,057.60	18.24%	2.61	97.07%	-40.00%
244	Buffington Mohr McNeal †††	Boise, Idaho	1,050.22	15.19%	1.64	5.29%	9.40%
245	Stansberry Asset Management	Westlake, Texas	1,049.02	19.82%	1.11	11.72%	7.25%
246	Woodard & Co. Asset Management Group	Bermuda Run, N.C.	1,039.00	14.05%	0.76	13.55%	0.44%
247	Fortis Capital Advisors	Prairie Village, Kan.	1,034.89	226.50%	0.85	17.24%	178.49%
248	Chemistry Wealth Management	New York, N.Y.	1,033.47	22.04%	1.95	13.52%	7.51%
249	Inspire Advisors	Meridian, Idaho	1,033.38	23.71%	0.29	2.35%	20.88%

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250	Arista Wealth Management	Las Vegas, Nev.	1,028.54	65.57%	2.32	43.52%	15.36%
251	Catalyst Financial Partners	Boston, Mass.	1,021.91	23.52%	3.12	-26.19%	67.35%
252	DiNuzzo Private Wealth	Beaver, Pa.	1,012.89	7.02%	1.26	8.08%	-0.99%
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION							
253	Great Lakes Retirement	Sheffield Village, Ohio	962.64	23.91%	0.54	23.41%	0.40%
254	Lake Street Private Wealth	Chicago, Ill.	961.80	-3.90%	1.87	5.81%	-9.17%
255	Financial Advisors Network	Tustin, Calif.	954.00	19.10%	1.28	7.48%	10.81%
256	Southern Financial Group	Birmingham, Ala.	936.12	9.51%	0.83	7.95%	1.44%
257	Fi3 Financial Advisors	Indianapolis, Ind.	928.44	17.28%	3.84	6.13%	10.50%
258	Sikich Financial	Springfield, Ill.	920.00	22.82%	0.74	0.46%	22.26%
259	Christopher Weil & Company	San Diego, Calif.	913.48	16.82%	1.73	17.26%	-0.38%
260	Mitchell Capital Management	Leawood, Kan.	905.40	18.71%	2.87	10.04%	7.88%
261	WorthPointe	San Diego, Calif.	885.56	20.76%	1.74	21.94%	-0.97%
262	CapSouth Wealth Management	Dothan, Ala.	884.37	15.92%	2.16	19.04%	-2.62%
263	REDW Wealth	Albuquerque, N.M.	880.87	-12.32%	2.05	-10.28%	-2.28%
264	Goodman Financial Corporation	Houston, Texas	864.94	23.81%	2.99	8.39%	14.23%
265	Schnieders Capital Management	Pasadena, Calif.	864.42	19.23%	3.68	26.84%	-6.00%
266	Aufman Associates	Sewickley, Pa.	863.22	6.78%	3.48	3.34%	3.33%
267	Blankinship & Foster	Solana Beach, Calif.	862.15	10.48%	2.85	11.21%	-0.66%
268	Omnia Family Wealth	Aventura, Fla.	859.18	13.05%	5.30	-4.40%	18.25%
269	BlueSky Wealth Advisors **	New Bern, N.C.	849.83	16.39%	2.43	16.05%	0.29%
270	Keller Wealth Advisors	Victoria, Texas	824.73	17.17%	1.53	11.73%	4.86%
271	Rainey & Randall Wealth Advisors	Celebration, Fla.	820.42	14.23%	2.71	11.21%	2.71%
272	William Mack & Associates	Troy, Mich.	820.39	8.69%	0.84	-5.50%	15.02%
273	First Affirmative Financial Network	Colorado Springs, Colo.	809.55	9.16%	0.35	12.01%	-2.54%
274	Asset Management Group	Stamford, Conn.	804.48	0.00%	3.04	0.75%	-0.75%
275	Insight Wealth Partners	Plano, Texas	789.96	13.36%	0.84	6.36%	6.58%
276	Frisch Financial Group	Melville, N.Y.	789.66	9.55%	1.42	4.05%	5.28%
277	PJ Schmidt Investment Management	Cedarburg, Wis.	787.27	9.66%	1.63	5.11%	4.33%
278	Leisure Capital Management	Costa Mesa, Calif.	778.66	10.62%	2.41	6.51%	3.86%
279	Briaud Financial Advisors	College Station, Texas	775.33	9.97%	2.79	7.60%	2.21%
280	High Net Worth Advisory Group	Naples, Fla.	769.85	18.68%	1.82	15.59%	2.67%
281	Morling Financial Advisors	Fremont, Calif.	755.72	24.50%	2.09	17.61%	5.87%
282	Birchwood Financial Partners	Edina, Minn.	746.55	-87.35%	1.50	-89.73%	23.21%
283	Optas Capital	Austin, Texas	741.35	16.99%	4.55	1.20%	15.60%
284	Walkner Condon Financial Advisors	Madison, Wis.	732.82	15.68%	1.09	7.97%	7.14%
285	NBC Capital Advisors	Beaverton, Ore.	710.55	26.06%	0.84	18.64%	6.25%
286	Adams Wealth Advisors	Logan, Utah	709.06	17.49%	0.99	14.22%	2.87%
287	JVL Wealth Strategies	Wyoming, Mich.	672.45	21.67%	3.89	6.20%	14.57%
288	Hopwood Financial Services	Reston, Va.	666.56	21.62%	2.39	14.64%	6.08%
289	Gradient Capital Advisors	San Diego, Calif.	637.52	16.67%	1.38	7.60%	8.43%
290	Clune & Associates	Chicago, Ill.	630.13	8.14%	2.83	5.23%	2.76%
291	Asio Capital	Lexington, Ky.	621.54	24.42%	2.32	15.13%	8.06%
292	Diesslin Group	Fort Worth, Texas	621.33	6.15%	2.58	1.75%	4.33%
293	Wilsey Asset Management	San Diego, Calif.	621.18	21.55%	0.73	21.12%	0.35%
294	Financial Management Strategies	Broadview Hts., Ohio	619.53	14.30%	0.37	21.85%	-6.19%
295	NorthCape Wealth Management	Williamsville, N.Y.	614.52	8.65%	0.97	2.50%	6.00%
296	Manske Wealth Management	Houston, Texas	608.49	18.54%	1.27	8.14%	9.61%
297	Optima Asset Management	Dallas, Texas	607.14	1.35%	4.98	3.02%	-1.61%
298	Sensible Money	Scottsdale, Ariz.	603.67	17.11%	2.17	8.26%	8.17%

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299	Palumbo Wealth Management	Great Neck, N.Y.	600.02	61.57%	2.27	41.98%	13.79%
300	Dash Investments	Woodland Hills, Calif.	600.00	53.85%	1.33	2.56%	50.00%
301	Trinity Financial Advisors	Columbus, Ohio	580.44	19.10%	3.28	16.41%	2.31%
302	Pathview Wealth Advisors	San Diego, Calif.	579.62	6.33%	1.46	-0.38%	6.74%
303	von Borstel & Associates	The Dalles, Ore.	576.36	14.26%	1.32	21.30%	-5.81%
304	Sandbox Financial Partners	Bethesda, Md.	575.17	24.03%	1.28	7.50%	15.38%
305	WJ Interests	Sugar Land, Texas	553.00	14.26%	2.44	9.73%	4.13%
306	Aspen Wealth Management	Fort Worth, Texas	509.58	38.50%	1.55	20.76%	14.69%
307	Alpha Financial Advisors	Charlotte, N.C.	503.10	13.23%	2.01	15.05%	-1.57%
ASSET CATEGORY: \$250 MILLION TO < \$500 MILLION							
308	Andrews, Lucia Wealth Management	Danville, Calif.	496.81	8.93%	2.53	5.60%	3.16%
309	QP Consulting	Takoma Park, Md.	496.62	17.95%	6.99	12.96%	4.41%
310	Jackson Square Capital	San Francisco, Calif.	488.83	24.17%	3.42	12.88%	10.00%
311	Meritas Wealth Management	San Rafael, Calif.	483.84	-7.52%	2.11	-9.54%	2.23%
312	Reston Wealth Management	Reston, Va.	477.10	15.87%	1.06	10.72%	4.65%
313	StrongBox Wealth	Lee's Summit, Mo.	456.53	15.86%	1.00	12.06%	3.39%
314	Searcy Financial Services	Overland Park, Kan.	447.67	18.47%	2.36	10.37%	7.34%
315	ShoreHaven Wealth Partners	Red Bank, N.J.	445.32	11.09%	2.23	2.76%	8.11%
316	Monarch Wealth Strategies	Santa Barbara, Calif.	434.77	29.09%	1.03	36.43%	-5.38%
317	Grunden Financial Advisory	Denton, Texas	434.72	18.17%	2.06	13.69%	3.94%
318	Merkle Retirement Planning	Grimes, Iowa	428.55	28.00%	N/A	N/A	N/A
319	WealthCrest Financial Services	Springfield, Va.	426.05	14.56%	1.31	11.04%	3.17%
320	Samalin Wealth	Chappaqua, N.Y.	420.60	15.38%	0.80	6.41%	8.44%
321	MBM Wealth Consultants	Chesterfield, Mo.	417.89	24.75%	0.69	17.50%	6.17%
322	Branson, Fowlkes & Company	Houston, Texas	407.03	24.29%	2.07	19.25%	4.23%
323	Fidato Wealth	Middleburg Heights, Ohio	406.51	21.55%	1.49	16.20%	4.60%
324	FSA Advisors	Troy, Mich.	396.63	35.77%	0.25	10.72%	22.62%
325	Sard Wealth Management Group	Atlanta, Ga.	389.41	16.28%	1.31	13.93%	2.06%
326	Edge Financial Advisors	Wheaton, Ill.	379.26	4.64%	1.68	41.68%	-26.14%
327	Steadmont Advisors \$\$\$	Birmingham, Ala.	368.44	N/A	1.23	N/A	N/A
328	Integrated Capital Management	Bloomfield Hills, Mich.	367.64	29.84%	0.88	26.73%	2.45%
329	Legacy Consulting Group	Plano, Texas	356.41	12.58%	2.38	11.08%	1.35%
330	Veripax Wealth Management	Folsom, Calif.	342.91	18.37%	1.04	7.21%	10.40%
331	Baron Financial Group	Fair Lawn, N.J.	340.03	2.49%	1.02	-5.19%	8.09%
332	Sebold Capital Management	Lisle, Ill.	331.21	9.02%	3.31	17.74%	-7.41%
333	Sharper & Granite	EL Segundo, Calif.	318.27	6.14%	2.43	2.09%	3.97%
334	Life Planning Partners	Jacksonville, Fla.	311.97	13.94%	3.22	6.89%	6.59%
335	Foresight Capital Management Advisors	Saline, Mich.	310.05	22.29%	0.56	12.56%	8.64%
336	Everest Management Corp.	Cupertino, Calif.	306.96	38.03%	3.74	22.88%	12.33%
337	Premia Global Advisors	Coral Gables, Fla.	299.71	14.90%	5.26	24.97%	-8.06%
338	Centerline Wealth Advisors	Louisville, Ky.	293.28	12.37%	1.08	17.74%	-4.56%
339	Canter Wealth	La Jolla, Calif.	267.88	-6.59%	1.03	8.08%	-13.58%
340	Alpha Solutions Investment Advisors	South San Francisco, Calif.	261.47	51.70%	0.84	5.21%	44.19%
ASSET CATEGORY: \$150 MILLION TO < \$250 MILLION							
341	Gold Medal Waters	Boulder, Colo.	248.14	28.16%	1.69	23.80%	3.52%
342	Oak Advisors	Hilton Head Island, S.C.	241.82	15.70%	1.51	5.58%	9.59%
343	Center For Asset Management	Palm Beach Gardens, Fla.	229.08	18.49%	1.00	16.42%	1.77%
344	Pearson Creek Capital Management	Chicago, Ill.	226.00	0.44%	9.83	-30.13%	43.75%
345	Atwater Wealth Management	Boston, Mass.	221.98	15.22%	2.22	14.07%	1.01%
346	Byrne Asset Management	Kingston, N.J.	216.41	2.63%	1.53	-1.01%	3.68%

*Average assets per client relationship. **2024 AUM is as of February 2025. † AUM represents all assets of Creative Planning Holding Company, which includes Creative Planning and United Capital. ††2024 AUM is as November 2024. †††2024 AUM are assets under advisement. §2024 AUM is as March 2025. §§Cary Street Partners Financial is the parent company to Cary Street Partners Investment Advisory.

¶AUM includes assets managed by Corient, and firms in which Corient has an investment. Not all assets are considered regulatory assets as defined by their Form ADV. ¶¶C2P Capital Advisor Group doing business as Prosperity Capital Advisors. †††Formerly SBK Financial. ††††BTFM dba Buffington Mohr McNeal. §§§Firm started in January 2024.

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FA's 2025 RIA RANKING

 Commonwealth

2024 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2024 ASSETS (\$MM)*	% GROWTH IN ASSETS 2023-2024	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
347	Professional Financial Strategies	Pittsford, N.Y.	205.83	7.46%	2.02	10.62%	-2.86%
348	Lighthouse Wealth Management	Ashland, Ohio	199.92	30.80%	0.53	23.19%	6.18%
349	Smith Bruer Advisors	Tallahassee, Fla.	198.23	24.20%	0.76	22.30%	1.56%
350	Ward & Associates	San Diego, Calif.	191.34	12.01%	3.48	9.97%	1.85%
351	Purtill Financial	Highland Heights, Ohio	190.41	14.37%	1.11	14.37%	0.00%
352	Advisor Share Wealth Management	Vancouver, Wash.	185.18	311.49%	0.19	-14.52%	381.41%
353	Flagship Capital Management	Media, Pa.	182.00	5.81%	1.26	2.17%	3.57%
354	CrossGrain Family Investments	Henrico, Va.	164.77	15.13%	1.94	-21.44%	46.55%
355	Paragon Wealth Management	Provo, Utah	156.86	0.28%	0.92	-4.44%	4.94%
ASSET CATEGORY: < \$150 MILLION							
356	SageOak Financial	Tulsa, Okla.	143.93	11.44%	0.54	12.70%	-1.12%
357	Steward Advisors	Chicago, Ill.	136.87	3.33%	1.34	3.33%	0.00%
358	Schneider Wealth Management	Woodside, Calif.	136.07	6.73%	3.40	25.41%	-14.89%
359	Shapiro Financial Security Group	Hazlet, N.J.	131.19	7.35%	0.94	6.58%	0.72%
360	BridgeLight Capital	Scottsdale, Ariz.	121.00	-12.32%	0.60	2.51%	-14.47%
361	St. John & Associates	Roswell, Ga, Ga.	116.09	8.38%	0.76	3.42%	4.79%
362	MTR Financial Services	Kingwood, Texas	109.18	11.70%	0.84	-1.19%	13.04%
363	MFAC Financial Advisors	Westlake Village, Calif.	66.49	32.99%	4.43	32.99%	0.00%
364	Venn Wealth & Benefit Services	Altoona, Pa.	30.93	39.27%	0.23	5.73%	31.73%
365	Birch Investment Management	Brookings, S.D.	20.05	1.37%	0.45	35.16%	-25.00%
366	Old Oak Advisors	Vestavia Hills, Ala.	16.35	23.79%	0.31	-9.53%	36.84%

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RIA Discretionary & Non-Discretionary AUM Ranking

2024 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2024 (\$MM)	NON-DISCRETIONARY ASSETS 2024 (\$MM)	YEAR END 2024 ASSETS (\$MM)*
ASSET CATEGORY: 1 BILLION AND OVER					
1	CAPTRUST Financial Advisors	Raleigh, N.C.	237,287.26	845,763.75	1,083,051.01
2	Edelman Financial Engines	Boston, Mass.	292,902.97	0.00	292,902.97
3	SageView Advisory Group	Newport Beach, Calif.	37,297.25	201,254.77	238,552.02
4	Creative Planning †	Overland Park, Kan.	231,001.49	3,608.88	234,610.38
5	Hightower Advisors	Chicago, Ill.	157,934.96	6,854.52	164,789.47
6	Corient ¶	Miami, Fla.	129,422.54	14,205.99	143,628.53
7	Cerity Partners	New York, N.Y.	104,674.85	18,173.84	122,848.69
8	Pathstone	Englewood, N.J.	62,621.09	37,823.05	100,444.14
9	Focus Partners Wealth	Boston, Mass.	87,282.61	8,607.27	95,889.89
10	Wealth Enhancement Advisory Services	Plymouth, Minn.	86,787.28	7,844.75	94,632.03
11	Fiducient Advisors	Chicago, Ill.	34,179.64	33,459.33	67,638.98
12	CIBC Private Wealth Advisors	Atlanta, Ga.	57,599.55	3,513.42	61,112.97
13	Mercer Advisors	Denver, Colo.	57,723.42	2,532.85	60,256.27
14	Cresset Asset Management ††	Chicago, Ill.	51,578.97	927.67	52,506.64
15	Innovest Portfolio Solutions ††	Denver, Colo.	0.00	50,616.98	50,616.98
16	Kayne Anderson Rudnick Investment Mgmt.	Los Angeles, Calif.	45,493.86	0.00	45,493.86
17	Moneta	St. Louis, Mo.	35,114.73	7,680.85	42,795.58
18	Beacon Pointe Advisors	Newport Beach, Calif.	36,189.49	3,650.27	39,839.76
19	AE Wealth Management **	Topeka, Kan.	37,525.71	0.00	37,525.71
20	Silvercrest Asset Management Group	New York, N.Y.	23,319.09	13,135.64	36,454.73
21	First Manhattan Co.	New York, N.Y.	33,260.04	1,179.53	34,439.57
22	Kovitz Investment Group Partners ‡	Chicago, Ill.	29,507.01	2,224.79	31,731.80
23	Wealthspire Advisors	New York, N.Y.	27,735.16	1,563.20	29,298.36
24	Savant Wealth Management	Rockford, Ill.	29,060.14	34.44	29,094.58
25	MAI Capital Management	Cleveland, Ohio	26,919.15	2,141.13	29,060.28
26	AITi Tiedemann Global	New York, N.Y.	24,266.53	4,776.64	29,043.17
27	Evoke Advisors	Los Angeles, Calif.	12,453.07	15,242.41	27,695.49
28	Steward Partners	New York, N.Y.	21,498.73	5,374.68	26,873.41
29	Allworth Financial	Folsom, Calif.	24,831.27	265.86	25,097.13
30	Clearstead Advisors	Cleveland, Ohio	18,595.62	5,698.56	24,294.18
31	1919 Investment Counsel	Baltimore, Md.	23,901.56	83.25	23,984.81
32	Johnson Investment Counsel	Cincinnati, Ohio	20,617.03	255.11	20,872.14
33	Oxford Financial Group	Carmel, Ind.	9,013.42	10,636.97	19,650.38
34	Newport Capital Group	Red Bank, N.J.	1,210.15	17,743.29	18,953.44
35	Homrich Berg	Atlanta, Ga.	16,954.60	1,636.81	18,591.40
36	Choreo	Rockford, Ill.	15,998.08	2,234.28	18,232.36
37	RWA Wealth Partners	Newton, Mass.	16,893.56	361.68	17,255.24
38	Waverly Advisors	Birmingham, Ala.	15,660.90	469.29	16,130.19
39	Aspiriant	Los Angeles, Calif.	12,538.98	2,993.95	15,532.93
40	Modera Wealth Management	Westwood, N.J.	15,170.46	340.02	15,510.48
41	WE Family Offices	Coral Gables, Fla.	0.00	15,364.80	15,364.80
42	myCIO Wealth Partners	Philadelphia, Pa.	1,086.37	13,329.30	14,415.67
43	Evercore Wealth Management	New York, N.Y.	13,827.08	71.51	13,898.60
44	Appleton Partners	Boston, Mass.	13,452.68	0.00	13,452.68
45	Mason Investment Advisory Service	Reston, Va.	12,327.25	877.00	13,204.25
46	Investment Research & Advisory Group	Atlanta, Ga.	843.99	12,353.62	13,197.61
47	CV Advisors	Aventura, Fla.	1,584.71	11,270.81	12,855.52
48	CliftonLarsonAllen Wealth Advisors	Minneapolis, Minn.	7,287.82	5,040.00	12,327.82

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49	Gresham Partners	Chicago, Ill.	7,421.89	4,228.87	11,650.77
50	Williams Jones Wealth Management	New York, N.Y.	11,566.43	52.43	11,618.86
51	Freestone Capital Management	Seattle, Wash.	8,056.13	3,437.49	11,493.62
52	Sentinel	Wakefield, Mass.	3,054.65	7,675.58	10,730.23
53	Coldstream Wealth Management	Bellevue, Wash.	9,190.22	1,270.91	10,461.13
54	Brookstone Capital Management	Wheaton, Ill.	10,409.14	0.00	10,409.14
55	Caprock	Boise, Idaho	9,899.29	250.04	10,149.33
56	Mission Wealth Management	Santa Barbara, Calif.	7,827.06	2,197.01	10,024.06
57	Curi RMB Capital	Chicago, Ill.	8,888.29	942.39	9,830.68
58	Heck Capital Advisors	Rhineland, Wis.	4,045.89	5,624.61	9,670.50
59	Advisors Capital Management	Ridgewood, N.J.	9,470.06	0.00	9,470.06
60	Bartlett Wealth Management	Cincinnati, Ohio	9,337.93	53.31	9,391.24
61	CW Advisors	Boston, Mass.	9,205.61	96.37	9,301.98
62	Conrad Siegel Investment Advisors	Harrisburg, Pa.	3,033.29	6,003.01	9,036.30
63	Forum Financial Management	Lombard, Ill.	8,954.45	76.19	9,030.64
64	Ferguson Wellman Capital Management	Portland, Ore.	8,992.35	0.00	8,992.35
65	Choate Investment Advisors	Boston, Mass.	8,020.93	854.63	8,875.55
66	Tolleson Wealth Management	Dallas, Texas	8,502.00	257.00	8,759.00
67	Soltis Investment Advisors	St. George, Utah	8,352.55	0.00	8,352.55
68	Cornerstone Advisors Asset Management	Bethlehem, Pa.	4,276.75	4,022.28	8,299.03
69	Cary Street Partners Financial §§	Richmond, Va.	5,477.77	2,786.12	8,263.89
70	Joel Isaacson & Co.	New York, N.Y.	5,619.31	2,419.70	8,039.01
71	Pure Financial Advisors ‡	San Diego, Calif.	7,867.27	155.96	8,023.23
72	SignatureFD	Atlanta, Ga.	7,310.38	690.38	8,000.76
73	Shuster Advisory Group	Pasadena, Calif.	7,819.40	89.99	7,909.38
74	F.L.Putnam Investment Management Co.	Lynnfield, Mass.	7,629.19	66.71	7,695.90
75	Bradley, Foster & Sargent	Hartford, Conn.	7,672.89	3.63	7,676.52
76	Plancorp	St. Louis, Mo.	6,655.63	639.40	7,295.03
77	Robertson Stephens Wealth Management	San Francisco, Calif.	5,617.92	1,521.47	7,139.38
78	Crestwood Advisors Group	Boston, Mass.	6,821.33	194.66	7,015.99
79	Perigon Wealth Management	San Francisco, Calif.	5,112.12	1,828.83	6,940.95
80	HBKS Wealth Advisors	Erie, Pa.	6,432.92	422.06	6,854.98
81	Ingalls & Snyder	New York, N.Y.	6,799.78	0.15	6,799.93
82	Simon Quick Advisors	Morristown, N.J.	6,159.68	557.32	6,717.00
83	Composition Wealth	Los Angeles, Calif.	6,714.19	0.00	6,714.19
84	Callan Family Office	Radnor, Pa.	5,914.29	755.26	6,669.55
85	Zhang Financial	Portage, Mich.	4,281.44	2,266.25	6,547.69
86	Gradient Investments	Arden Hills, Minn.	6,513.11	0.00	6,513.11
87	Bailard	Foster City, Calif.	6,385.13	15.22	6,400.35
88	Axxcess Wealth Management	Carlsbad, Calif.	6,197.59	131.81	6,329.40
89	Procyon Partners	Shelton, Conn.	2,081.14	4,197.58	6,278.72
90	Cassaday & Company	McLean, Va.	5,982.80	0.00	5,982.80
91	Badgley Phelps Wealth Managers	Seattle, Wash.	5,519.21	383.57	5,902.78
92	Grimes & Company	Westborough, Mass.	5,453.61	138.94	5,592.56
93	Kovack Advisors	Fort Lauderdale, Fla.	4,754.75	778.75	5,533.51
94	Confluence Financial Partners	Mcmurray, Pa.	4,889.14	565.03	5,454.18
95	Truepoint Wealth Counsel	Cincinnati, Ohio	5,343.77	47.70	5,391.47
96	Index Fund Advisors	Irvine, Calif.	5,329.17	0.00	5,329.17
97	Westmount Partners	Los Angeles, Calif.	5,172.31	30.37	5,202.68

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98	Carnegie Investment Counsel	Pepper Pike, Ohio	4,633.89	519.93	5,153.82
99	Crescent Grove Advisors	Lake Forest, Ill.	4,954.21	42.06	4,996.27
100	PermCap Investment Office	Charleston, S.C.	2,143.08	2,789.40	4,932.48
101	Pension Consultants	Springfield, Mo.	2,357.58	2,564.23	4,921.82
102	Allegheny Financial Group	Pittsburgh, Pa.	4,802.09	102.05	4,904.13
103	SYM Financial Advisors	Winona Lake, Ind.	4,237.11	642.51	4,879.62
104	TFO Wealth Partners	Maumee, Ohio	4,799.74	53.04	4,852.79
105	Klingman & Associates	New York, N.Y.	3,473.31	1,363.21	4,836.52
106	Mayflower Advisors	Boston, Mass.	1,521.00	3,258.42	4,779.43
107	Moran Wealth Management	Naples, Fla.	3,734.50	1,009.11	4,743.61
108	Klingenstein Fields Advisors	New York, N.Y.	3,960.08	777.22	4,737.30
109	Constellation Wealth Advisors	Cincinnati, Ohio	2,662.80	1,998.93	4,661.73
110	TCI Wealth Advisors	Tucson, Ariz.	4,521.40	5.78	4,527.18
111	Advance Capital Management	Southfield, Mich.	4,437.08	67.37	4,504.45
112	True North Advisors	Dallas, Texas	4,106.50	371.75	4,478.25
113	Chicago Capital	Chicago, Ill.	4,466.22	11.27	4,477.49
114	Baker Tilly Wealth Management	Madison, Wis.	2,053.79	2,372.07	4,425.86
115	Hamilton Capital	Columbus, Ohio	4,250.32	131.54	4,381.86
116	Brownson, Rehms & Foxworth	Chicago, Ill.	0.00	4,270.99	4,270.99
117	Palisade Capital Management	Fort Lee, N.J.	4,222.62	3.32	4,225.94
118	Sowell Management	North Little Rock, Ark.	4,135.83	87.55	4,223.38
119	Heritage Investors Management Corporation §	Bethesda, Md.	4,171.34	9.45	4,180.78
120	TFO Family Office Partners	Phoenix, Ariz.	4,153.81	13.68	4,167.48
121	Mainstay Capital Management	Grand Blanc, Mich.	3,729.91	437.32	4,167.23
122	Clifford Swan Investment Counselors	Pasadena, Calif.	3,611.00	532.00	4,143.00
123	Larson Financial Group	St. Louis, Mo.	3,487.84	544.89	4,032.74
124	Finaccess Advisors	Miami, Fla.	0.00	4,021.35	4,021.35
125	JFS Wealth Advisors	Hermitage, Pa.	3,513.32	491.81	4,005.13
126	IFG Advisory	Atlanta, Ga.	3,770.65	201.80	3,972.45
127	Bragg Financial Advisors	Charlotte, N.C.	3,904.37	0.00	3,904.37
128	Sand Hill Global Advisors	Palo Alto, Calif.	3,836.20	44.23	3,880.43
129	Greenspring Advisors	Towson, Md.	3,748.78	26.54	3,775.32
130	Schechter Wealth	Birmingham, Mich.	3,233.43	515.61	3,749.04
131	Wescott Financial Advisory Group	Philadelphia, Pa.	2,847.20	877.81	3,725.00
132	Accredited Investors Wealth Management	Edina, Minn.	3,402.83	312.36	3,715.19
133	Prosperity Capital Advisors ¶¶	Westlake, Ohio	3,684.97	0.00	3,684.97
134	Sage Financial Group	Conshohocken, Pa.	3,261.73	362.40	3,624.13
135	Foster Group	West Des Moines, Iowa	3,525.46	17.54	3,543.00
136	Halbert Hargrove Global Advisors	Long Beach, Calif.	3,446.37	70.04	3,516.42
137	Team Hewins	Redwood City, Calif.	1,669.64	1,763.58	3,433.22
138	Henssler Financial	Kennesaw, Ga.	2,745.77	657.45	3,403.22
139	Performance Wealth	Hinsdale, Ill.	3,363.05	24.07	3,387.12
140	Capital Wealth Advisors **	Naples, Fla.	3,174.11	166.55	3,340.66
141	Credent Wealth Management	Auburn, Ind.	3,338.00	0.00	3,338.00
142	MCF Advisors	Lexington, Ky.	2,328.91	1,000.43	3,329.35
143	The Welch Group	Birmingham, Ala.	3,212.01	0.00	3,212.01
144	Burney Company	Reston, Va.	3,097.13	39.86	3,136.98
145	Certuity	North Palm Beach, Fla.	2,085.04	1,014.99	3,100.03
146	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	2,994.44	105.54	3,099.98

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RIA Discretionary & Non-Discretionary AUM Ranking

2024 TOTAL ASSETS RANK	FIRM NAME	LOCATION	DISCRETIONARY ASSETS 2024 (\$MM)	NON-DISCRETIONARY ASSETS 2024 (\$MM)	YEAR END 2024 ASSETS (\$MM)*
147	Heritage Financial Services	Westwood, Mass.	3,063.94	0.00	3,063.94
148	FAS Wealth Partners	Leawood, Kan.	3,027.82	31.04	3,058.86
149	Wealthcare Capital Management	Richmond, Va.	2,987.24	43.64	3,030.88
150	Compound Planning	New York City, N.Y.	3,025.36	0.00	3,025.36
151	AlphaCore Wealth Advisory	La Jolla, Calif.	2,456.51	546.70	3,003.21
152	Bogart Wealth	McLean, Va.	2,112.53	876.55	2,989.08
153	Morton Wealth	Calabasas, Calif.	2,928.60	27.73	2,956.33
154	Schneider Downs Wealth Management Advisors	Pittsburgh, Pa.	1,871.41	1,040.89	2,912.31
155	Inspire Investing	Meridian, Idaho	2,856.92	0.00	2,856.92
156	Chesley, Taft & Associates	Chicago, Ill.	2,585.79	209.05	2,794.83
157	BLBB Advisors	Montgomeryville, Pa.	2,695.29	44.47	2,739.76
158	GHP Investment Advisors	Denver, Colo.	2,637.72	85.41	2,723.13
159	Greenwich Wealth Management	Greenwich, Conn.	2,319.79	390.86	2,710.65
160	Stokes Family Office	New Orleans, La.	2,475.15	210.30	2,685.45
161	Retirement Income Solutions	Ann Arbor, Mich.	2,656.77	0.00	2,656.77
162	CPS Investment Advisors	Lakeland, Fla.	2,656.26	0.04	2,656.29
163	Birch Hill Investment Advisors	Boston, Mass.	2,654.30	0.00	2,654.30
164	Fairway Wealth Management	Independence, Ohio	1,039.61	1,566.98	2,606.59
165	Winthrop Wealth	Boston, Mass.	2,577.26	23.63	2,600.89
166	West Financial Services	McLean, Va.	2,542.05	32.57	2,574.62
167	Foster & Motley	Cincinnati, Ohio	2,476.51	60.82	2,537.32
168	Parcion Private Wealth	Bellevue, Wash.	2,489.14	42.39	2,531.53
169	SJS Investment Services	Sylvania, Ohio	2,526.31	0.00	2,526.31
170	SFMG Wealth Advisors	Plano, Texas	2,289.05	235.66	2,524.71
171	Red Door Wealth Management	Memphis, Tenn.	1,885.44	635.08	2,520.52
172	Berger Financial Group	Plymouth, Minn.	2,500.00	0.00	2,500.00
173	Kingswood Wealth Advisors	San Diego, Calif.	2,431.12	39.82	2,470.94
174	Bedel Financial Consulting	Indianapolis, Ind.	2,469.60	1.12	2,470.73
175	Capstone Financial Advisors	Downers Grove, Ill.	2,433.54	8.40	2,441.94
176	Sax Wealth Advisors	Parsippany, N.J.	2,388.09	52.76	2,440.85
177	Zemenick & Walker	St. Louis, Mo.	0.00	2,429.56	2,429.56
178	RTD Financial	Philadelphia, Pa.	2,360.55	21.08	2,381.63
179	CFS Investment Advisory Services	Totowa, N.J.	1,530.69	841.75	2,372.44
180	Baltimore Financial Advisors	Columbia, Md.	2,371.00	0.00	2,371.00
181	Osborne Partners Capital Management	San Francisco, Calif.	2,308.38	50.46	2,358.84
182	Legacy Wealth Management	Memphis, Tenn.	2,225.92	132.76	2,358.68
183	Smith Salley Wealth Management	Greensboro, N.C.	2,343.48	0.71	2,344.19
184	Colter Lewis Investment Partners	Greenwich, Conn.	486.42	1,834.51	2,320.93
185	LVW Advisors	Pittsford, N.Y.	1,779.77	502.03	2,281.80
186	IPI Wealth Management	Decatur, Ill.	2,136.53	112.46	2,248.99
187	Duncan Williams Asset Management	Memphis, Tenn.	2,028.96	134.13	2,163.09
188	Foster Victor	Greenville, S.C.	2,051.98	101.09	2,153.07
189	Boulay Financial Advisors	Eden Prairie, Minn.	1,960.23	166.54	2,126.76
190	RZH Advisors	Stamford, Conn.	2,121.08	0.00	2,121.08
191	Diversified	Wilmington, Del.	2,025.45	16.03	2,041.48
192	Condor Capital Wealth Management	Martinsville, N.J.	1,691.28	305.12	1,996.41
193	LBMC Investment Advisors	Brentwood, Tenn.	1,953.86	0.00	1,953.86
194	Sather Financial Group	Victoria, Texas	1,943.95	4.96	1,948.91
195	Abacus Planning Group	Columbia, S.C.	1,832.74	66.29	1,899.04

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RIA Discretionary & Non-Discretionary AUM Ranking

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196	Traphagen Investment Advisors	Oradell, N.J.	1,799.28	98.93	1,898.21
197	DT Investment Partners	Chadds Ford, Pa.	1,802.40	85.56	1,887.96
198	Albion Financial Group	Salt Lake City, Utah	1,740.38	117.74	1,858.12
199	ProVise Management Group	Clearwater, Fla.	1,779.45	24.86	1,804.31
200	PDS Planning	Dublin, Ohio	1,735.11	57.17	1,792.29
201	Segment Wealth Management	Houston, Texas	1,756.99	0.00	1,756.99
202	Conservest Capital Advisors	Wynnewood, Pa.	1,724.89	17.99	1,742.87
203	Fiduciary Pension Partners	Westfield, N.J.	89.24	1,620.55	1,709.79
204	Cahaba Wealth Management	Atlanta, Ga.	1,641.23	0.00	1,641.23
205	Aveo Capital Partners	Englewood, Colo.	1,449.79	187.02	1,636.81
206	Altfest Personal Wealth Management	New York, N.Y.	1,622.51	0.00	1,622.51
207	Azzad Asset Management	Falls Church, Va.	1,607.91	8.15	1,616.06
208	Financial Synergies Wealth Advisors	Houston, Texas	1,560.27	6.10	1,566.37
209	First Pacific Financial	Vancouver, Wash.	1,506.72	5.40	1,512.12
210	Weatherly Asset Management	Del Mar, Calif.	1,458.02	11.49	1,469.51
211	Willis Johnson & Associates	Houston, Texas	1,322.35	97.62	1,419.97
212	Rollins Financial Advisors	Atlanta, Ga.	1,382.59	0.00	1,382.59
213	Destiny Wealth Partners	Tavares, Fla.	1,205.00	148.00	1,353.00
214	MJP Wealth Advisors	Farmington, Conn.	1,319.06	0.00	1,319.06
215	Evolution Wealth Advisors	Aventura, Fla.	1,184.25	125.87	1,310.13
216	Tanglewood Total Wealth Management	Houston, Texas	1,305.38	0.00	1,305.38
217	BigSur Wealth Management	Miami, Fla.	803.35	499.31	1,302.66
218	MG&A Wealth	Plantation, Fla.	1,200.00	100.00	1,300.00
219	CJM Wealth Advisers	Falls Church, Va.	1,229.02	56.15	1,285.17
220	Archford Capital Strategies	Swansea, Ill.	1,278.99	0.00	1,278.99
221	Petersen Hastings Wealth Advisors	Kennewick, Wash.	1,278.12	0.00	1,278.12
222	Retirement Investment Advisors	Oklahoma City, Okla.	1,268.29	0.00	1,268.29
223	Sargent Investment Group	Bethesda, Md.	968.42	299.24	1,267.67
224	Pinkerton Wealth	Coeur d'Alene, Idaho	1,169.65	84.16	1,253.82
225	Sheets Smith Wealth Management	Winston-Salem, N.C.	1,244.35	0.00	1,244.35
226	Versant Capital Management	Phoenix, Ariz.	1,051.18	187.91	1,239.09
227	Acorn Financial Advisory Services	Reston, Va.	1,126.57	107.97	1,234.54
228	Apriem Advisors	Irvine, Calif.	1,217.30	11.85	1,229.15
229	Virtue Capital Management	Brentwood, Tenn.	1,208.39	0.00	1,208.39
230	WealthCrossing †††	Richmond, Va.	1,203.98	0.00	1,203.98
231	Salomon & Ludwin	Richmond, Va.	1,200.00	0.00	1,200.00
232	The Planning Center	Moline, Ill.	1,159.64	27.25	1,186.88
233	Total Wealth Planning	Cincinnati, Ohio	1,112.91	65.23	1,178.15
234	Falcon Wealth Planning	Ontario, Calif.	1,126.48	33.06	1,159.54
235	Moisand Fitzgerald Tamayo	Orlando, Fla.	1,150.57	0.00	1,150.57
236	Fermata Advisors	Sonoma, Calif.	919.19	226.08	1,145.26
237	Aspen Capital Management	Boise, Idaho	1,108.47	22.16	1,130.63
238	Rappaport Reiches Capital Management	Skokie, Ill.	1,130.00	0.00	1,130.00
239	Premier Path Wealth Partners	Madison, N.J.	1,104.98	0.00	1,104.98
240	Absher Wealth Management	Chapel Hill, N.C.	1,007.73	80.89	1,088.62
241	Ullmann Wealth Partners	Jacksonville Beach, Fla.	1,067.21	7.22	1,074.43
242	Vision Capital Management	Portland, Ore.	1,073.00	0.00	1,073.00
243	Hemington Wealth Management	Falls Church, Va.	1,057.60	0.00	1,057.60
244	Buffington Mohr McNeal †††	Boise, Idaho	1,030.50	19.72	1,050.22

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RIA Discretionary & Non-Discretionary AUM Ranking

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245	Stansberry Asset Management	Westlake, Texas	1,049.02	0.00	1,049.02
246	Woodard & Company Asset Management Group	Bermuda Run, N.C.	1,017.00	22.00	1,039.00
247	Fortis Capital Advisors	Prairie Village, Kan.	1,034.89	0.00	1,034.89
248	Chemistry Wealth Management	New York, N.Y.	1,023.90	9.57	1,033.47
249	Inspire Advisors	Meridian, Idaho	1,033.38	0.00	1,033.38
250	Arista Wealth Management	Las Vegas, Nev.	836.18	192.36	1,028.54
251	Catalyst Financial Partners	Boston, Mass.	1,021.91	0.00	1,021.91
252	DiNuzzo Private Wealth	Beaver, Pa.	1,012.89	0.00	1,012.89
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION					
253	Great Lakes Retirement	Sheffield Village, Ohio	898.54	64.10	962.64
254	Lake Street Private Wealth	Chicago, Ill.	819.18	142.62	961.80
255	Financial Advisors Network	Tustin, Calif.	885.00	69.00	954.00
256	Southern Financial Group	Birmingham, Ala.	936.12	0.00	936.12
257	Fi3 Financial Advisors	Indianapolis, Ind.	790.77	137.67	928.44
258	Sikich Financial	Springfield, Ill.	920.00	0.00	920.00
259	Christopher Weil & Company	San Diego, Calif.	874.77	38.70	913.48
260	Mitchell Capital Management	Leawood, Kan.	861.00	44.40	905.40
261	WorthPointe	San Diego, Calif.	885.56	0.00	885.56
262	CapSouth Wealth Management	Dothan, Ala.	394.34	490.04	884.37
263	REDW Wealth	Albuquerque, N.M.	832.22	48.64	880.87
264	Goodman Financial Corporation	Houston, Texas	861.92	3.02	864.94
265	Schnieders Capital Management	Pasadena, Calif.	820.56	43.87	864.42
266	Aufman Associates	Sewickley, Pa.	863.22	0.00	863.22
267	Blankinship & Foster	Solana Beach, Calif.	862.15	0.00	862.15
268	Omnia Family Wealth	Aventura, Fla.	734.25	124.92	859.18
269	BlueSky Wealth Advisors **	New Bern, N.C.	849.83	0.00	849.83
270	Keller Wealth Advisors	Victoria, Texas	810.82	13.91	824.73
271	Rainey & Randall Wealth Advisors	Celebration, Fla.	820.42	0.00	820.42
272	William Mack & Associates	Troy, Mich.	818.17	2.23	820.39
273	First Affirmative Financial Network	Colorado Springs, Colo.	629.10	180.45	809.55
274	Asset Management Group	Stamford, Conn.	804.48	0.00	804.48
275	Insight Wealth Partners	Plano, Texas	788.32	1.64	789.96
276	Frisch Financial Group	Melville, N.Y.	746.66	43.00	789.66
277	PJ Schmidt Investment Management	Cedarburg, Wis.	765.76	21.51	787.27
278	Leisure Capital Management	Costa Mesa, Calif.	778.66	0.00	778.66
279	Briaud Financial Advisors	College Station, Texas	747.30	28.03	775.33
280	High Net Worth Advisory Group	Naples, Fla.	731.36	38.49	769.85
281	Morling Financial Advisors	Fremont, Calif.	755.72	0.00	755.72
282	Birchwood Financial Partners	Edina, Minn.	725.57	20.97	746.55
283	Optas Capital	Austin, Texas	741.35	0.00	741.35
284	Walkner Condon Financial Advisors	Madison, Wis.	654.40	78.42	732.82
285	NBC Capital Advisors	Beaverton, Ore.	662.24	48.30	710.55
286	Adams Wealth Advisors	Logan, Utah	709.06	0.00	709.06
287	JVL Wealth Strategies	Wyoming, Mich.	651.16	21.29	672.45
288	Hopwood Financial Services	Reston, Va.	666.56	0.00	666.56
289	Gradient Capital Advisors	San Diego, Calif.	546.49	91.03	637.52
290	Clune & Associates	Chicago, Ill.	571.03	59.10	630.13
291	Asio Capital	Lexington, Ky.	621.54	0.00	621.54
292	Diesslin Group	Fort Worth, Texas	582.88	38.45	621.33

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293	Wilsey Asset Management	San Diego, Calif.	621.18	0.00	621.18
294	Financial Management Strategies	Broadview Hts., Ohio	500.15	119.38	619.53
295	NorthCape Wealth Management	Williamsville, N.Y.	596.74	17.78	614.52
296	Manske Wealth Management	Houston, Texas	608.49	0.00	608.49
297	Optima Asset Management	Dallas, Texas	0.00	607.14	607.14
298	Sensible Money	Scottsdale, Ariz.	603.67	0.00	603.67
299	Palumbo Wealth Management	Great Neck, N.Y.	588.00	12.02	600.02
300	Dash Investments	Woodland Hills, Calif.	600.00	0.00	600.00
301	Trinity Financial Advisors	Columbus, Ohio	580.44	0.00	580.44
302	Pathview Wealth Advisors	San Diego, Calif.	544.69	34.93	579.62
303	von Borstel & Associates	The Dalles, Ore.	576.36	0.00	576.36
304	Sandbox Financial Partners	Bethesda, Md.	525.67	49.50	575.17
305	WJ Interests	Sugar Land, Texas	553.00	0.00	553.00
306	Aspen Wealth Management	Fort Worth, Texas	502.09	7.49	509.58
307	Alpha Financial Advisors	Charlotte, N.C.	501.76	1.34	503.10
ASSET CATEGORY: \$250 MILLION TO < \$500 MILLION					
308	Andrews, Lucia Wealth Management	Danville, Calif.	496.81	0.00	496.81
309	QP Consulting	Takoma Park, Md.	74.11	422.51	496.62
310	Jackson Square Capital	San Francisco, Calif.	284.45	204.37	488.83
311	Meritas Wealth Management	San Rafael, Calif.	483.84	0.00	483.84
312	Reston Wealth Management	Reston, Va.	464.19	12.90	477.10
313	StrongBox Wealth	Lee's Summit, Mo.	433.53	23.00	456.53
314	Searcy Financial Services	Overland Park, Kan.	441.63	6.04	447.67
315	ShoreHaven Wealth Partners	Red Bank, N.J.	445.32	0.00	445.32
316	Monarch Wealth Strategies	Santa Barbara, Calif.	434.77	0.00	434.77
317	Grunden Financial Advisory	Denton, Texas	434.72	0.00	434.72
318	Merkle Retirement Planning	Grimes, Iowa	428.55	0.00	428.55
319	WealthCrest Financial Services	Springfield, Va.	426.05	0.00	426.05
320	Samalin Wealth	Chappaqua, N.Y.	378.58	42.03	420.60
321	MBM Wealth Consultants	Chesterfield, Mo.	417.89	0.00	417.89
322	Branson, Fowlkes & Company	Houston, Texas	355.55	51.48	407.03
323	Fidato Wealth	Middleburg Heights, Ohio	406.51	0.00	406.51
324	FSA Advisors	Troy, Mich.	394.57	2.06	396.63
325	Sard Wealth Management Group	Atlanta, Ga.	360.25	29.16	389.41
326	Edge Financial Advisors	Wheaton, Ill.	374.48	4.79	379.26
327	Steadmont Advisors	Birmingham, Ala.	368.44	0.00	368.44
328	Integrated Capital Management	Bloomfield Hills, Mich.	367.64	0.00	367.64
329	Legacy Consulting Group	Plano, Texas	343.91	12.50	356.41
330	Veripax Wealth Management	Folsom, Calif.	342.53	0.38	342.91
331	Baron Financial Group	Fair Lawn, N.J.	335.79	4.24	340.03
332	Sebold Capital Management	Lisle, Ill.	293.72	37.49	331.21
333	Sharper & Granite	EL Segundo, Calif.	318.27	0.00	318.27
334	Life Planning Partners	Jacksonville, Fla.	311.14	0.82	311.97
335	Foresight Capital Management Advisors	Saline, Mich.	308.19	1.86	310.05
336	Everest Management Corp.	Cupertino, Calif.	281.41	25.55	306.96
337	Premia Global Advisors	Coral Gables, Fla.	275.77	23.93	299.71
338	Centerline Wealth Advisors	Louisville, Ky.	290.46	2.82	293.28
339	Canter Wealth	La Jolla, Calif.	267.86	0.02	267.88
340	Alpha Solutions Investment Advisors	South San Francisco, Calif.	261.47	0.00	261.47

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ASSET CATEGORY: \$150 MILLION TO < \$250 MILLION					
341	Gold Medal Waters	Boulder, Colo.	240.44	7.70	248.14
342	Oak Advisors	Hilton Head Island, S.C.	241.82	0.00	241.82
343	Center For Asset Management	Palm Beach Gardens, Fla.	229.08	0.00	229.08
344	Pearson Creek Capital Management	Chicago, Ill.	226.00	0.00	226.00
345	Atwater Wealth Management	Boston, Mass.	221.98	0.00	221.98
346	Byrne Asset Management	Kingston, N.J.	216.41	0.00	216.41
347	Professional Financial Strategies	Pittsford, N.Y.	185.93	19.90	205.83
348	Lighthouse Wealth Management	Ashland, Ohio	199.92	0.00	199.92
349	Smith Bruer Advisors	Tallahassee, Fla.	141.49	56.74	198.23
350	Ward & Associates	San Diego, Calif.	175.75	15.59	191.34
351	Purtill Financial	Highland Heights, Ohio	0.00	190.41	190.41
352	Advisor Share Wealth Management	Vancouver, Wash.	185.18	0.00	185.18
353	Flagship Capital Management	Media, Pa.	182.00	0.00	182.00
354	CrossGrain Family Investments	Henrico, Va.	164.77	0.00	164.77
355	Paragon Wealth Management	Provo, Utah	147.75	9.10	156.86
ASSET CATEGORY: < \$150 MILLION					
356	SageOak Financial	Tulsa, Okla.	143.93	0.00	143.93
357	Steward Advisors	Chicago, Ill.	129.08	7.79	136.87
358	Schneider Wealth Management	Woodside, Calif.	136.07	0.00	136.07
359	Shapiro Financial Security Group	Hazlet, N.J.	123.83	7.36	131.19
360	BridgeLight Capital	Scottsdale, Ariz.	121.00	0.00	121.00
361	St. John & Associates	Roswell, Ga. Ga.	111.48	4.61	116.09
362	MTR Financial Services	Kingwood, Texas	109.18	0.00	109.18
363	MFAC Financial Advisors	Westlake Village, Calif.	66.49	0.00	66.49
364	Venn Wealth & Benefit Services	Altoona, Pa.	29.09	1.83	30.93
365	Birch Investment Management	Brookings, S.D.	20.05	0.00	20.05
366	Old Oak Advisors	Vestavia Hills, Ala.	14.30	2.05	16.35

**2024 AUM is as of February 2025. †AUM represents all assets of Creative Planning Holding Company, which includes Creative Planning and United Capital. ††2024 AUM is as November 2024. ††2024 AUM are assets under advisement. §2024 AUM is as March 2025. §§Cary Street Partners Financial is the parent company to Cary Street Partners Investment Advisory. ¶AUM includes assets managed by Corient, and firms in which Corient has an investment. Not all assets are considered regulatory assets as defined by their Form ADV. ¶¶C2P Capital Advisor Group doing business as Prosperity Capital Advisors. †††Formerly SBK Financial. †††TBFM dba Buffington Mohr McNeal.

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