

FA's 2020 RIA RANKING

2019 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2019 ASSETS (\$MM)*	% GROWTH IN ASSETS 2018-2019	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.	389,150.70	34.35%	\$36.50	-16.12%	60.18%
2	Edelman Financial Engines	Santa Clara, Calif.	299,000.00	26.52%	\$0.18	17.41%	7.76%
3	First Republic Investment Management	San Francisco, Calif.	87,280.52	11.48%	\$5.11	-13.35%	28.65%
4	Global Retirement Partners	San Rafael, Calif.	67,728.45	68.86%	\$5.79	29.64%	30.25%
5	Fort Washington Investment Advisors	Cincinnati, Ohio	63,058.13	19.24%	\$143.31	78.85%	-33.33%
6	Creative Planning	Overland Park, Kan.	47,920.12	30.48%	\$1.57	21.20%	7.65%
7	Mariner Wealth Advisors	Overland Park, Kan.	29,434.61	33.53%	\$1.38	-1.15%	35.09%
8	CIBC Private Wealth Management	Atlanta, Ga.	27,072.29	50.00%	\$3.43	44.68%	3.68%
9	Silvercrest Asset Management Group	New York, N.Y.	25,070.08	31.72%	\$31.73	18.05%	11.58%
10	Moneta Group Investment Advisors	St. Louis, Mo.	23,734.42	17.16%	\$4.74	9.02%	7.47%
11	Advanced Capital Group	Minneapolis, Minn.	23,440.41	2.92%	\$78.66	-11.58%	16.41%
12	Segall Bryant & Hamill	Chicago, Ill.	19,661.20	7.98%	\$8.39	-3.17%	11.52%
13	DiMeo Schneider & Associates	Chicago, Ill.	19,119.13	38.14%	\$42.96	27.28%	8.54%
14	BBR Partners	New York, N.Y.	17,886.90	12.59%	\$120.05	8.06%	4.20%
15	Veritable	Newtown Square, Pa.	17,348.68	15.49%	\$77.45	15.49%	0.00%
16	Tiedemann Advisors	New York, N.Y.	17,318.95	24.41%	\$40.94	19.71%	3.93%
17	Plante Moran Financial Advisors	Southfield, Mich.	17,273.98	20.48%	\$5.96	19.82%	0.56%
18	Mercer Advisors	Denver, Colo.	15,616.89	46.13%	\$1.29	24.12%	17.73%
19	Buckingham Strategic Wealth	Clayton, Mo.	15,523.33	4.11%	\$1.79	-5.66%	10.36%
20	Bahl & Gaynor Investment Counsel	Cincinnati, Ohio	15,512.94	43.46%	\$20.44	36.47%	5.12%
21	1919 Investment Counsel	New York, N.Y.	15,117.31	28.02%	\$10.57	37.60%	-6.96%
22	Wealth Enhancement Advisory Services	Plymouth, Minn.	13,820.00	64.92%	\$0.82	27.14%	29.71%
23	Newport Capital Group	Red Bank, N.J.	13,446.25	8.47%	\$74.29	-1.11%	9.70%
24	Boston Private Wealth	Boston, Mass.	13,315.70	96.13%	\$4.26	53.34%	27.91%
25	Johnson Investment Counsel	Cincinnati, Ohio	13,117.96	23.04%	\$3.50	14.69%	7.28%
26	Oxford Financial Group	Carmel, Ind.	13,097.23	18.58%	\$16.41	9.36%	8.42%
27	Aspiriant	Los Angeles, Calif.	12,758.73	9.33%	\$7.61	9.85%	-0.47%
28	Carson Wealth	Omaha, Neb.	12,552.30	67.30%	\$2.57	-31.55%	144.40%
29	Advanced Research Investment Solutions (ARIS)	Los Angeles, Calif.	12,092.11	11.78%	\$172.74	-5.79%	18.64%
30	The Colony Group	Boston, Mass.	11,550.82	51.53%	\$3.06	14.81%	31.99%
31	Wealthspire Advisors	New York, N.Y.	10,638.50	22.56%	\$3.17	17.41%	4.39%
32	Pathstone	Boston, Mass.	10,251.42	20.12%	\$35.23	18.47%	1.39%
33	Beacon Pointe Advisors	Newport Beach, Calif.	9,949.69	80.71%	\$2.29	-46.25%	236.20%
34	LeafHouse Financial	Austin, Texas	9,578.84	91.18%	\$5.95	37.24%	39.31%
35	Evercore Wealth Management	New York, N.Y.	9,196.87	21.65%	\$15.10	19.86%	1.50%
36	myCIO Wealth Partners	Philadelphia, Pa.	8,853.33	20.01%	\$11.71	16.20%	3.28%
37	RMB Capital	Chicago, Ill.	8,664.87	0.38%	\$4.81	1.66%	-1.26%
38	AE Wealth Management	Topeka, Kan.	8,583.74	83.06%	\$0.20	22.82%	49.05%
39	WE Family Offices	Miami, Fla.	8,537.56	15.33%	\$116.95	23.23%	-6.41%
40	TAG Associates	New York, N.Y.	8,349.62	3.66%	\$75.91	3.66%	0.00%
41	Mason Investment Advisory Services	Reston, Va.	8,330.74	28.01%	\$9.45	25.26%	2.20%
42	Signature Estate & Investment Advisors	Los Angeles, Calif.	8,253.80	-2.08%	\$0.99	-10.38%	9.26%
43	Allworth Financial	Sacramento, Calif.	8,095.77	134.41%	\$0.72	36.97%	71.14%
44	Ballentine Partners	Waltham, Mass.	7,927.99	23.40%	\$34.32	12.72%	9.48%
45	MAI Capital Management	Cleveland, Ohio	7,166.35	60.68%	\$4.69	1.73%	57.95%
46	Homrich Berg	Atlanta, Ga.	6,985.24	28.00%	\$3.49	18.40%	8.11%
47	EP Wealth Advisors	Torrance, Calif.	6,930.00	68.72%	\$1.26	10.44%	52.78%
48	CV Advisors	Aventura, Fla.	6,810.50	34.48%	\$86.21	34.48%	0.00%

*Discretionary and nondiscretionary AUM reported on Form ADV. **Average assets per client relationship. NM = not meaningful.

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