

# TOP 100 RIAs

REGISTERED INVESTMENT advisors increasingly come in all shapes and sizes as the industry continues to evolve. In assembling *REP*'s "Top 100 RIAs" list for this year with data from Meridian-IQ (in whom Penton Media has a stake), we tried to focus on the services that make RIAs appealing to retail investors. All firms on the list, for example, offer

financial and retirement planning and portfolio management for individuals. They all have at least some clients for whom they do planning, and individual clients must make up more than 10 percent of clientele. Finally, none of these firms operates a broker/dealer, but some of them do receive revenue from commissions.

Primary Business Name	Main office	Website address	# employees give advice	Individual clients	Discretionary AUM (MM)	Non-Discretionary AUM (MM)	Total AUM (MM)	Total accounts
1. <b>GenSpring Family Offices LLC</b>	Jupiter, Fla.	genspring.com	125	26-50%	\$10,115	\$5,024	\$15,140	13,287
2. <b>Sageview Advisory Group LLC</b>	Irvine, Calif.	sageviewadvisory.com	37	51-75%	\$37	\$14,363	\$14,400	498
3. <b>Comprehensive Financial Management LLC</b>	Los Gatos, Calif.		6	11-25%	\$7,900	\$0	\$7,900	17
4. <b>Atlantic Trust Private Wealth Management</b>	Chicago	atlantictrust.com	89	51-75%	\$5,976	\$1,318	\$7,293	3,503
5. <b>Advanced Capital Group</b>	Minneapolis	acgbiz.com	10	26-50%	\$91	\$6,061	\$6,153	281
6. <b>Beacon Pointe Advisors LLC</b>	Newport Beach, Calif.	bpadvisor.com	19	51-75%	\$2,406	\$2,129	\$4,535	3,823
7. <b>McGladrey Wealth Management LLC</b>	Minneapolis	mcgladrey.com/services	60	26-50%	\$3,071	\$1,086	\$4,157	10,292
8. <b>Blue Prairie Group LLC</b>	Chicago	blueprairiegroup.com	6	11-25%	\$132	\$4,005	\$4,137	287
9. <b>Reinhart Partners Inc.</b>	Mequon, Wis.	reinhart-partnersinc.com	21	51-75%	\$3,789	\$25	\$3,814	4,213
10. <b>Kibble &amp; Prentice Holding Company</b>	Seattle	kpc.com	20	11-25%	\$0	\$3,037	\$3,037	536
11. <b>Strategic Capital Advisers Inc.</b>	Denver	scadv.com	6	51-75%	\$1,041	\$1,941	\$2,982	163
12. <b>Spruce Private Investors LLC</b>	Stamford, Conn.	spruceinvest.com	5	11-25%	\$1,174	\$1,756	\$2,930	216
13. <b>Aspiriant Investment Advisors LLC</b>	Cincinnati	aia.aspiriant.com	17	51-75%	\$6	\$2,894	\$2,900	2,075
14. <b>Gofen And Glossberg LLC</b>	Chicago	gofen.com	13	11-25%	\$2,609	\$165	\$2,774	2,675
15. <b>Alaska Permanent Capital Management Co.</b>	Anchorage	apcm.net	7	26-50%	\$2,461	\$2	\$2,463	346
16. <b>Silver Bridge</b>	Boston	silverbridgeadv.com	29	51-75%	\$2,148	\$192	\$2,340	1,895
17. <b>Becker Capital Management Inc.</b>	Portland	beckercap.com beckervaluefunds.com	12	26-50%	\$2,282	\$0	\$2,282	841
18. <b>SEIA</b>	Los Angeles	seia.com	22	11-25%	\$221	\$1,915	\$2,136	5,893
19. <b>Molewski Financial Partners</b>	Bethlehem, Pa.	molewskifinancial.com	12	26-50%	\$270	\$1,792	\$2,062	136
20. <b>First Foundation Advisors</b>	Irvine, Calif.	ff-inc.com	27	26-50%	\$1,901	\$63	\$1,965	2,462
21. <b>Capital Investment Counsel Inc.</b>	Denver	cicinvestments.com	16	11-25%	\$1,871	\$2	\$1,873	3,867

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22. Heck Capital Advisors LLC	Rhineland, Wis.	heckcapital.com	10	26-50%	\$370	\$1,486	\$1,856	1,433
23. Windsor Financial Group LLC	Minneapolis	wfgweb.com	9	76-99%	\$389	\$1,446	\$1,834	702
24. Courier Capital Corporation	Buffalo, N.Y.	couriercapital.com	7	26-50%	\$690	\$1,142	\$1,832	1,428
25. South Texas Money Management Ltd.	San Antonio, Texas	stmmltd.com	25	26-50%	\$1,773	\$45	\$1,818	2,239
26. Bazzell Financial	Lafayette, Calif.	N/A	0	76-99%	\$1,803	\$0	\$1,803	156
27. Finaccess Advisors LLC	Concord, Mass.	N/A	2	11-25%	\$65	\$1,704	\$1,769	268
28. Linscomb & Williams	Houston	linscomb-williams.com	6	76-99%	\$1,766	\$0	\$1,766	3,761
29. Manchester Capital Management LLC	Manchester, Vt.	N/A	10	11-25%	\$1,492	\$271	\$1,762	744
30. Pacific Portfolio Consulting LLC	Seattle	pacific-portfolio.com	7	26-50%	\$403	\$1,321	\$1,724	222
31. Heintzberger Payne Advisors	Portland	heintzbergerpayne.com myplanaccount.com nwcapi.com plantoact.com portfolioupdate.com zmeo.com	9	26-50%	\$1,668	\$25	\$1,693	868
32. Crescent Capital Consulting LLC	New Orleans	crescentcapitalconsulting.com	7	51-75%	\$0	\$1,675	\$1,675	75
33. WestonFinancial	Wellesley, Mass.	westonfinancial.net	20	11-25%	\$1,249	\$385	\$1,635	5,749
34. Palladium Registered Investment Advisors	Norfolk, Va.	palladiumllc.com	7	26-50%	\$1,272	\$30	\$1,302	1,375
35. HBKS Wealth Advisors	Erie, Pa.	hbksorce.com hbkswealth.com	27	76-99%	\$1,191	\$59	\$1,251	5,098
36. Baker Tilly Investment Advisors	Madison, Wis.	bakertilly.com	18	11-25%	\$1,217	\$14	\$1,231	2,483
37. Concert Wealth Management	San Jose, Calif.	clpwm.com concertglobal.com concertwm.com corinthianwealth.com focus-wa.com segmentasset.com urbanwm.com walesinvestments.com	6	51-75%	\$895	\$335	\$1,230	2,650
38. Carroll Financial Associates Inc.	Charlotte, N.C.	carrollfinancial.com	18	76-99%	\$1,005	\$176	\$1,181	2,828
39. Banyan Partners LLC	Palm Beach Gardens, Fla.	banyanpartners.net	21	26-50%	\$942	\$168	\$1,110	3,150
40. Miller/Russell & Associates LLC	Phoenix, Ariz.	miller-russell.com	16	26-50%	\$654	\$442	\$1,096	395
41. Evergreen Capital Management LLC	Bellevue, Wash.	evergreencapital.net	6	26-50%	\$892	\$149	\$1,041	1,212
42. Weatherstone Capital Management	Northglenn, Colo.	wcmprivateclient.com weatherstonecm.com	4	76-99%	\$1,032	\$6	\$1,039	5,451
43. Radnor Financial Advisors Inc.	Wayne, Pa.	radnorfinancial.com	6	11-25%	\$1,031	\$0	\$1,031	1,323
44. Hynes Himmelreich Glennon & Company LLC	Darien, Conn.	hhg.net	5	26-50%	\$931	\$76	\$1,007	1,718

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45. <b>True North Advisors LLC</b>	Dallas	truenorthadvisors.com	16	26-50%	\$817	\$163	\$980	3,765
46. <b>Brouwer &amp; Janachowski LLC</b>	Tiburon, Calif.	fundmastery.com	7	26-50%	\$980	\$0	\$980	1,034
47. <b>Filament LLC</b>	Seattle	filamentadvisors.com	10	11-25%	\$581	\$398	\$979	261
48. <b>Advisory Services &amp; Investments LLC</b>	Bend, Ore.	advisory-services.com	4	11-25%	\$189	\$776	\$964	144
49. <b>CapGroup Advisors</b>	Richmond, Va.	thecapgroup.com	10	11-25%	\$226	\$720	\$946	356
50. <b>Morton Capital Management</b>	Calabasas, Calif.	mortoncapital.com	14	26-50%	\$791	\$138	\$928	1,852
51. <b>Singer Xenos Wealth Management</b>	Coral Gables, Fla.	singerxenos.com	9	11-25%	\$918	\$1	\$919	2,319
52. <b>A. Montag &amp; Associates Inc.</b>	Atlanta	amontag.com	12	11-25%	\$883	\$3	\$886	866
53. <b>North Star Asset Management Inc.</b>	Menasha, Wis.	northstarinvestments.com	10	51-75%	\$847	\$17	\$865	1,439
54. <b>Foster Dykema Cabot &amp; Co Inc.</b>	Boston	fdcco.com	7	11-25%	\$843	\$18	\$862	421
55. <b>Eton Advisors LP</b>	Chapel Hill, N.C.	etonadvisors.com	4	11-25%	\$626	\$201	\$826	316
56. <b>Farr Miller &amp; Washington LLC</b>	Washington, D.C.	farrmiller.com	12	11-25%	\$817	\$8	\$825	788
57. <b>Retirement Income Solutions Inc.</b>	Ann Arbor, Mich.	risadvisory.com	7	51-75%	\$808	\$0	\$808	817
58. <b>Dixon Hughes Goodman Wealth Advisors LLC</b>	Asheville, N.C.	dhwga.com dhgwealthadvisors.com	15	26-50%	\$759	\$41	\$800	2,893
59. <b>The Harbor Group Inc.</b>	Bedford, N.H.	harbortgroup.com	4	76-99%	\$736	\$55	\$791	571
60. <b>Emery Howard</b>	San Mateo, Calif.	emeryhoward.com	3	26-50%	\$757	\$31	\$788	1,608
61. <b>Haberer Registered Investment Advisor Inc.</b>	Cincinnati	haberer.com	6	26-50%	\$728	\$45	\$773	620
62. <b>Citir Cooperman Wealth Management LP</b>	Philadelphia	ccwmlp.com	10	11-25%	\$608	\$158	\$766	678
63. <b>Wealthplan Advisors</b>	Scottsdale, Ariz.	wealthplanadvisor.com	7	11-25%	\$152	\$614	\$766	472
64. <b>Baker Avenue Asset Management LP</b>	San Francisco	bakerave.com	9	76-99%	\$453	\$307	\$760	847
65. <b>Strategic Wealth Partners LLC</b>	Deerfield, Ill.	stratwealth.com	5	26-50%	\$449	\$302	\$751	1,612
66. <b>RubinBrown Advisors</b>	St. Louis	rubinbrown.com	6	26-50%	\$0	\$712	\$712	908
67. <b>Argent Sector Capital Management LLC</b>	Memphis	argentmoney.com sectorplus.com	10	11-25%	\$685	\$15	\$700	450
68. <b>Cozad Asset Management Inc.</b>	Champaign, Ill.	cozadasstgmt.com	14	51-75%	\$532	\$148	\$681	1,397
69. <b>Oakmont Partners LLC</b>	Boston	oakmontpwm.com	7	26-50%	\$176	\$500	\$675	871
70. <b>Mastrapasqua Asset Management Inc.</b>	Nashville	mastrapasqua.com	7	51-75%	\$674	\$0	\$674	330
71. <b>Strategic Wealth Management Group LLC</b>	Columbia, Md.	swealth.com	11	51-75%	\$493	\$176	\$670	2,701
72. <b>Resnick Investment Advisors LLC</b>	Westport, Conn.	resnickinvestment.com	11	26-50%	\$666	\$3	\$669	899

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73. <b>Savant Investment Group LLC</b>	San Francisco	savantig.com	16	51-75%	\$668	\$0	\$668	1,150
74. <b>Howe And Rusling Inc.</b>	Rochester, N.Y.	howeandrusling.com	7	51-75%	\$635	\$30	\$665	1,050
75. <b>Barnes Pettey Financial Advisors LLC</b>	Clarksdale, Miss.	barnespettey.com	8	26-50%	\$122	\$542	\$664	2,695
76. <b>Albion Financial Group</b>	Salt Lake City	albionfinancial.com	7	51-75%	\$627	\$32	\$659	1,350
77. <b>Durbin Bennett Peterson Private Wealth Management LLP</b>	Austin	dbpaustin.com	8	11-25%	\$646	\$8	\$654	685
78. <b>Syntrinsic Investment Counsel LLC</b>	Denver	syntrinsic.com	5	26-50%	\$35	\$615	\$650	107
79. <b>Tanglewood Wealth Management Inc.</b>	Houston	tanglewoodwealth.com	3	11-25%	\$648	\$0	\$648	774
80. <b>Schneider Downs Wealth Management Advisors LP</b>	Pittsburgh	schneiderdowns.com sdwealthmanagement.com	12	26-50%	\$311	\$315	\$626	668
81. <b>Rainier Group Investment Advisory LLC</b>	Bellevue, Wash.	rginv.com	15	26-50%	\$626	\$0	\$626	1,407
82. <b>Windsor Group Ltd.</b>	Indianapolis, Ind.	windsor-group.com	7	26-50%	\$618	\$0	\$618	1,881
83. <b>MCF Advisors LLC</b>	Covington, Ky.	mcfadvisors.com	6	26-50%	\$431	\$184	\$615	722
84. <b>Lucas Capital Management LLC</b>	Red Bank, N.J.	lucascapital.com	5	26-50%	\$601	\$4	\$605	510
85. <b>Bill Few Associates Inc.</b>	Pittsburgh	billfew.com	21	76-99%	\$378	\$225	\$604	2,425
86. <b>Diesslin &amp; Associates Inc.</b>	Fort Worth, Texas	diesslin.com	9	26-50%	\$391	\$211	\$602	1,946
87. <b>Sadoff Investment Management LLC</b>	Milwaukee, Wis.	sadoffinvestments.com teamsadoff.com	3	26-50%	\$590	\$0	\$590	543
88. <b>Kanawha Capital Management LLC</b>	Richmond, Va.	kancap.com	5	26-50%	\$519	\$49	\$569	809
89. <b>FBB Capital Partners</b>	Bethesda, Md.	fbbcapitalpartners.com	9	26-50%	\$532	\$36	\$568	1,869
90. <b>Meyer Capital Group</b>	Marlton, N.J.	meyercg.com	7	76-99%	\$488	\$74	\$562	673
91. <b>Tom Johnson Investment Management LLC</b>	Oklahoma City, Okla.	tjim.com	6	26-50%	\$499	\$56	\$555	905
92. <b>Pettinga Financial Advisors LLC</b>	Evansville, Ind.	pettinga.com	4	51-75%	\$544	\$6	\$550	2,026
93. <b>Argent Wealth Management Inc.</b>	Weston, Mass.	argentwm.com	6	26-50%	\$547	\$0	\$547	1,270
94. <b>Urban Financial Advisory Corporation</b>	Chicago	ufinadv.com	3	11-25%	\$517	\$29	\$546	499
95. <b>Towneley Capital Management Inc.</b>	Laguna Hills, Calif.	towneley.com	9	26-50%	\$542	\$0	\$542	290
96. <b>PYA Waltman Capital LLC</b>	Knoxville, Tenn.	pyawaltman.com	5	51-75%	\$219	\$320	\$539	1,085
97. <b>Castlekeep Investment Advisors</b>	Westport, Conn.	castlekeepadvisors.com	3	11-25%	\$112	\$427	\$539	93
98. <b>The Advisory Group Of San Francisco LLC</b>	San Francisco	advisorygroupsf.com	5	11-25%	\$251	\$287	\$538	305
99. <b>Phillips Financial Management</b>	Fort Wayne, Ind.	1phillips.com	11	51-75%	\$537	\$0	\$537	1,154
100. <b>D L Carlson Investment Group Inc.</b>	Concord, N.H.	carlsoninvest.com	5	51-75%	\$535	\$0	\$535	413