

Top 50 RIAs	Firm	City	State	AUM (billions)	Accounts	Employees	Investment advisors	Custodian clearing firm	Website
1	Genspring Family Off.	Palm Beach Gardens	FL	\$16.85	13,119	251-500	51-250	Schwab	genspring.com
2	Oxford Financial Group	Carmel	IN	\$10.44	5,196	51-250	11-50	Schwab, Fidelity	ofgtd.com
3	Veritable	Newtown Square	PA	\$10.06	2,642	51-250	11-50	Fidelity, Schwab	veritablelp.com
4	Silvercrest Asset Mgmt.	New York	NY	\$9.69	3,738	51-250	11-50	Schwab, Pershing	silvercrestgroup.com
5	Harris myCFO Investment Advisory Svcs.	Palo Alto	CA	\$7.30	1,619	11-50	11-50	Schwab, Pershing	harrismycfo.com
6	Ronald Blue & Co.	Roswell	GA	\$5.83	14,271	251-500	51-250	Schwab, Fidelity	everydaysteward.com
7	BBR Partners	New York	NY	\$5.39	982	51-250	11-50	Schwab, Fidelity	bbrpartners.com
8	Everett Harris & Co.	Los Angeles	CA	\$5.38	1,119	11-50	6-10	Schwab	everetharris.com
9	myCIO Wealth Partners	Philadelphia	PA	\$5.32	3,546	11-50	11-50	Schwab, Pershing TD Ameritrade	myciowp.com
10	Aspiriant	San Francisco	CA	\$4.56	3,128	51-250	11-50	Schwab	aspiriant.com
11	KLS Professional Adv.	New York	NY	\$4.18	6,894	11-50	11-50	Schwab, Fidelity	klsadvisors.com
12	Klingenstein Fields	New York	NY	\$3.87	1,721	11-50	11-50	Schwab	amp-se.com
13	Luminous Capital	Los Angeles	CA	\$3.86	1,482	11-50	11-50	Schwab, Fidelity	luminouscap.com
14	Mercer Global Advisors	Santa Barbara	CA	\$3.79	13,086	51-250	51-250	Schwab	pfs.merceradvisors.com
15	Avalon Advisors	Houston	TX	\$3.63	1,533	11-50	11-50	N/A	avalonadvisorsllc.com
16	Ballentine Partners	Waltham	MA	\$3.25	2,238	11-50	11-50	Fidelity, Schwab	ballentinepartners.com
17	Welch & Forbes	Boston	MA	\$3.16	2,239	51-250	11-50	TD Ameritrade, Schwab	welchforbes.com
18	Buckingham Asset Mgmt.	St. Louis	MO	\$3.12	7,478	51-250	11-50	Schwab	buckinghamassetmanagement.com
19	Wetherby Asset Mgmt.	San Francisco	CA	\$3.02	3,117	51-250	11-50	Schwab	wetherby.com
20	Gofen and Glossberg	Chicago	IL	\$2.91	2,712	11-50	11-50	Schwab	gofen.com
21	Spruce Private Investors	Stamford	CT	\$2.85	170	11-50	6-10	N/A	spruceinvest.com
22	Bartlett & Co.	Cincinnati	OH	\$2.80	2,584	11-50	11-50	Schwab	bartlett1898.com
23	Ferguson Wellman Capital Management	Portland	OR	\$2.77	1,769	11-50	11-50	Schwab	fergusonwellman.com
24	Evercore Wealth Mgmt.	New York	NY	\$2.53	819	11-50	11-50	N/A	evercorewealthmanagement.com
25	Tiedemann Wealth Management	New York	NY	\$2.37	954	11-50	11-50	N/A	tiedemannwealth.com
26	Cornerstone Advisors	Bellevue	WA	\$2.27	1,900	11-50	11-50	Schwab	buildbeyond.com
27	Creative Planning	Overland Park	KS	\$2.26	7,677	11-50	11-50	TD Ameritrade, Schwab	thinkingbeyond.com
28	Douglas C. Lane & Assoc.	New York	NY	\$2.25	3,073	11-50	6-10	Schwab, Fidelity	dclaonline.com

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29	Atherton Lane Advisers	Menlo Park	CA	\$2.25	742	11-50	11-50	Schwab	athertonlane.com
30	Northeast Financial Consultants	Westport	CT	\$2.24	1,411	1-5	1-5	Fidelity, Commonwealth Financial Network, Schwab	northeastfinancialservices.com
31	Bingham, Osborn & Scarborough	San Francisco	CA	\$2.20	3,188	11-50	11-50	Schwab, Fidelity	bosinvest.com
32	Evanson Asset Mgmt.	Carmel	CA	\$2.19	2,970	6-10	1-5	Schwab, Fidelity Vanguard, Aegon, TD Ameritrade	evansonasset.com
33	R. M. Davis	Portland	ME	\$2.18	3,231	11-50	11-50	Schwab	mdavis.com
34	Signature Financial Mgmt.	Norfolk	VA	\$2.16	794	11-50	11-50	Schwab, Fidelity	signatureus.com
35	Homrich Berg	Atlanta	GA	\$2.10	3,305	51-250	11-50	Schwab, Fidelity TD Ameritrade,	homrichberg.com
36	Savant Capital Mgmt.	Rockford	IL	\$2.10	2,211	51-250	11-50	TD Ameritrade, Schwab, Fidelity, Vanguard Group	zeroalpha group.com
37	RegentAtlantic Capital	Morristown	NJ	\$2.07	1,237	11-50	11-50	Schwab, Fidelity, TD Ameritrade	regentatlantic.com
38	Arlington Partners	Birmingham	AL	\$2.06	703	11-50	6-10	N/A	arlingtonpartners.com
39	Mill Creek Capital Adv.	Conshohocken	PA	\$2.00	1,872	11-50	6-10	N/A	millcreekcap.com
40	RMB Capital Mgmt.	Chicago	IL	\$2.00	7,453	51-250	51-250	Fidelity, Morgan Stanley, Schwab, Smith Barney	rmbcap.com
41	Choate Investment Advisors	Boston	MA	\$2.00	1,374	6-10	6-10	Fidelity	choate.com
42	Silver Bridge	Boston	MA	\$1.94	1,921	11-50	11-50	N/A	silverbridgeadv.com
43	Inverness Counsel	New York	NY	\$1.94	916	11-50	11-50	Schwab	invernesscounsel.com
44	Highmount Capital	New York	NY	\$1.88	84	11-50	11-50	N/A	hmcap.com
45	Linscomb & Williams	Houston	TX	\$1.86	3,871	11-50	11-50	Schwab, Fidelity	linscombwilliams.com
46	Capital Investment Counsel	Denver	CO	\$1.83	3,742	11-50	11-50	Schwab	cicinvestments.com
47	Clifford Swan Investment Counsel	Pasadena	CA	\$1.82	2,136	11-50	11-50	Schwab	cliffordswan.com
48	Balasa Dinverno Foltz	Itasca	IL	\$1.74	3,144	11-50	11-50	Schwab, TD Ameritrade	bdflc.com
49	Manchester Capital Mgmt.	Manchester	VT	\$1.70	853	11-50	6-10	Schwab, Fidelity	mcmlc.com
50	Brighton Jones	Seattle	WA	\$1.68	536	6-10	11-50	Fidelity, Schwab	brightonjones.com

Source: RIA Database

Top RIAs by growth	Firm	City	State	AUM (billions)	Increase in discretionary assets since 2008 (millions)	Total accounts	Employees	Investment advisors	Custodian clearing firm	Website
1	GenSpring Family Off.	Palm Beach Gardens	FL	\$16.85	\$1,572.94	13,119	251-500	51-250	Schwab	genspring.com
2	Oxford Financial Group	Carmel	IN	\$10.44	\$393.49	5,196	51-250	11-50	Schwab, Fidelity	ofgltd.com
3	Veritable	Newtown Square	PA	\$10.06	\$647.89	2,642	51-250	11-50	Fidelity, Schwab	veritablelp.com
4	Ronald Blue & Co.	Roswell	GA	\$5.83	\$396.76	14,271	251-500	51-250	Schwab, Fidelity	everyday-steward.com
5	BBR Partners	New York	NY	\$5.39	\$991.36	982	51-250	11-50	Schwab, Fidelity	bbrpartners.com
6	myCIO Wealth Partners	Philadelphia	PA	\$5.32	\$568.16	3,546	11-50	11-50	Schwab, Pershing TD Ameritrade	myciowp.com
7	KLS Professional Advisors Group	New York	NY	\$4.18	\$459.44	6,894	11-50	11-50	Schwab, Fidelity	klsadvisors.com
8	Luminous Capital	Los Angeles	CA	\$3.86	\$2,018.46	1,482	11-50	11-50	Schwab, Fidelity	luminouscap.com
9	Ballentine Partners	Waltham	MA	\$3.25	\$1,928.00	2,238	11-50	11-50	Fidelity, Schwab	ballentine-partners.com
10	Buckingham Asset Management	St. Louis	MO	\$3.12	\$1,345.83	7,478	51-250	11-50	Schwab	buckinghamassetmanagement.com
11	Wetherby Asset Management	San Francisco	CA	\$3.02	\$752.83	3,117	51-250	11-50	Schwab	wetherby.com
12	Spruce Private Investors	Stamford	CT	\$2.85	\$1,229.44	170	11-50	6-10	N/A	spruceinvest.com
13	Evercore Wealth Management	New York	NY	\$2.53	\$2,401.78	819	11-50	11-50	N/A	evercorewealthmanagement.com
14	Tiedemann Wealth Management	New York	NY	\$2.37	\$319.39	954	11-50	11-50	N/A	tiedemann-wealth.com
15	Creative Planning	Overland Park	KS	\$2.26	\$1,393.27	7,677	11-50	11-50	TD Ameritrade, Schwab	thinking-beyond.com
16	Atherton Lane Advisers	Menlo Park	CA	\$2.25	\$425.65	742	11-50	11-50	Schwab	athertonlane.com
17	Evanson Asset Mgmt.	Carmel	CA	\$2.19	\$410.09	2,970	6-10	1-5	Schwab, Fidelity Vanguard, Aegon, TD Ameritrade	evansonasset.com
18	Signature Financial Management	Norfolk	VA	\$2.16	\$1,303.68	794	11-50	11-50	Schwab, Fidelity	signatureus.com
19	Savant Capital Management	Rockford	IL	\$2.09	\$533.97	2,211	51-250	11-50	TD Ameritrade, Schwab, Fidelity, Vanguard	zeroalphagroup.com
20	Arlington Partners	Birmingham	AL	\$2.06	\$619.34	703	11-50	6-10	N/A	arlingtonpartners.com
21	Mill Creek Capital Advisors	Conshohocken	PA	\$2.00	\$907.28	1,872	11-50	6-10	N/A	millcreekcap.com
22	RMB Capital Management	Chicago	IL	\$2.00	\$346.08	7,453	51-250	51-250	Fidelity, Morgan Stanley, Schwab, Smith Barney	rmbcap.com
23	Silver Bridge	Boston	MA	\$1.94	\$608.99	1,921	11-50	11-50	N/A	silverbridgadv.com
24	Capital Investment Counsel	Denver	CO	\$1.83	\$470.03	3,742	11-50	11-50	Schwab	cicinvestments.com

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25	Joel Isaacson & Co.	New York	NY	\$1.75	\$714.33	2,945	11-50	11-50	Schwab, TD Ameritrade	joelisaacson.com
26	Balasa Dinverno Foltz	Itasca	IL	\$1.74	\$325.67	3,144	11-50	11-50	Schwab, TD Ameritrade	bdflc.com
27	Manchester Capital Management	Manchester	VT	\$1.70	\$350.77	853	11-50	6-10	Schwab, Fidelity	mcmlc.com
28	Halbert Hargrove	Long Beach	CA	\$1.66	\$308.53	669	11-50	11-50	Fidelity	halberthargrove.com
29	Dowling & Yahnke	San Diego	CA	\$1.58	\$411.39	2,533	11-50	6-10	Schwab	dywealth.com
30	ThomasPartners	Wellesley	MA	\$1.36	\$522.67	2,292	6-10	6-10	TD Ameritrade, Schwab	thomaspartnersinc.com
31	Adviser Investments	Newton	MA	\$1.34	\$464.93	4,544	11-50	11-50	Fidelity	adviserinvestments.com
32	Columbia Financial Advisors	Washington	DC	\$1.28	\$1,255	73	1-5	1-5	Schwab	columbiaadvisors.com
33	Hillview Capital Advisors	Radnor	PA	\$1.24	\$419.18	996	11-50	6-10	Fidelity	hillviewcap.com
34	Alesco Advisors	Pittsford	NY	\$1.24	\$563.02	628	11-50	6-10	Schwab	alescoadvisors.com
35	Steele Capital Management	Dubuque	IA	\$1.20	\$598.77	1,427	11-50	6-10	Schwab	steelecapital.com
36	Miller/Russell & Associates	Phoenix	AZ	\$1.17	\$809.16	433	11-50	6-10	Schwab	miller-russell.com
37	Mainstay Capital Mgmt.	Grand Blanc	MI	\$1.12	\$455.90	2,958	11-50	6-10	Schwab, Fidelity, TD Ameritrade	mainstay-capital.com
38	Tower Wealth Managers	Prairie Village	KS	\$1.10	\$402.96	1,616	6-10	1-5	N/A	towerwealth-managers.com
39	WIPFLi Hewins Investment Advisors	San Mateo	CA	\$1.08	\$401.99	1,821	11-50	11-50	Schwab	wipflihewins.com
40	Pathstone Family Office	Englewood	NJ	\$1.04	\$647.83	845	11-50	6-10	Pershing, Schwab	pathstone.com
41	Gibson Capital	Wexford	PA	\$1.00	\$894.64	549	6-10	1-5	Fidelity	gibsoncapital.com
42	Brouwer & Janachowski	Tiburon	CA	\$0.97	\$371.64	983	11-50	6-10	Schwab	fundmastery.com
43	Banyan Partners	Palm Beach Gardens	FL	\$0.97	\$563.63	2,897	11-50	6-10	Fidelity, Schwab	banyanpartners.net
44	Modera Wealth Mgmt.	Boston	MA	\$0.96	\$942.97	2,716	11-50	11-50	N/A	backbayfinancial.com
45	Bristlecone Advisors	Seattle	WA	\$0.96	\$324.64	526	11-50	6-10	Schwab	bristleconeadvisors.com
46	Covenant Multi-Family Offices	San Antonio	TX	\$0.88	\$881.00	501	11-50	11-50	N/A	covenantmfo.com
47	Arcus Capital Partners	Atlanta	GA	\$0.85	\$497.50	498	6-10	1-5	Schwab	arcuscpc.com
48	Balentine	Atlanta	GA	\$0.79	\$388.29	607	11-50	6-10	Pershing	balentine.com
49	Investment Counsel Co. of Nevada	Las Vegas	NV	\$0.77	\$470.96	592	11-50	1-5	Schwab	iccnv.com
50	HPM Partners	New York	NY	\$0.75	\$754.27	155	11-50	6-10	Schwab	hmppartners.com

Source: RIA Database

Emerging RIAs ranked by AUM	Firm	City	State	Total AUM (millions)	Growth in AUM since 2008 (millions)	Employees	Investment advisors	Website
1	Huber Financial	Buffalo Grove	IL	\$493.02	\$208.95	6-10	1-5	huberfinancial.com
2	Vision Capital Management	Portland	OR	\$461.20	\$288.74	6-10	6-10	vcmi.net
3	Daintree Advisors	Boston	MA	\$450.00	\$450.00	11-50	6-10	daintreadvisors.com
4	Patriot Investment Management Group	Knoxville	TN	\$432.06	\$253.63	11-50	11-50	patriotinvestment.com
5	Relyea Zuckerberg Hanson	Stamford	CT	\$427.00	\$427.00	6-10	1-5	rzhadvisors.com
6	Granite Investment Partners	El Segundo	CA	\$418.19	\$418.19	11-50	6-10	granitepartners-llc.com
7	Trovana	Redondo Beach	CA	\$413.06	\$263.06	6-10	6-10	trovana.com
8	Glassman Wealth Services	McLean	VA	\$407.10	\$407.10	1-5	1-5	glassmanwealth.com
9	Botty Investors	Chicago	IL	\$405.00	\$405.00	1-5	1-5	N/A
10	Congress Wealth Management	Boston	MA	\$401.61	\$401.61	6-10	1-5	congresswealth.com
11	Assetbuilder	Plano	TX	\$401.35	\$258.08	6-10	1-5	assetbuilder.com
12	Next Capital Mgmt.	New York	NY	\$392.24	\$225.76	6-10	6-10	nextcapitalmgmt.com
13	Sequent Asset Management	Houston	TX	\$390.16	\$276.28	1-5	1-5	sequentasset.com
14	Wealthquest	Cincinnati	OH	\$388.15	\$206.15	11-50	6-10	wqcorp.com
15	Novare Capital Management	Charlotte	NC	\$385.20	\$204.96	6-10	6-10	novarecapital.com
16	Independence Advisors	Wayne	PA	\$382.08	\$382.08	1-5	1-5	independenceadvisors.com
17	Stillwater Capital Advisors	Wayne	PA	\$382.00	\$382.00	6-10	1-5	stillwateradv.com
18	Clear Harbor Asset Management	New York	NY	\$378.68	\$378.68	11-50	6-10	clearharboram.com
19	Yolles, Toal & Post - Diversified Portfolios	Bloomfield Hills	MI	\$375.00	\$304.30	1-5	1-5	diversifiedportfolios.net
20	Gratus Capital Mgmt.	Atlanta	GA	\$365.00	\$265.00	6-10	1-5	gratuscapital.com
21	The Moorings Group	Atlanta	GA	\$362.07	\$230.85	1-5	1-5	mooringsgroup.com
22	Agw Capital Advisors	Tampa	FL	\$361.68	\$361.68	1-5	1-5	agwcapital.com
23	Hartland & Co.	Cleveland	OH	\$355.59	\$355.59	11-50	11-50	hartlandco.com
24	Astraeus Wealth Advisers	Park Ridge	IL	\$352.60	\$213.25	1-5	1-5	astraeusadvisers.com
25	Oak Tree Advisory Services	Carlsbad	CA	\$350.95	\$325.45	1-5	1-5	oaktreadvisory.com

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Emerging RIAs ranked by AUM	Firm	City	State	Total AUM (millions)	Growth in AUM since 2008 (millions)	Employees	Investment advisors	Website
26	Palisade Asset Mgmt.	Minneapolis	MN	\$349.13	\$220.88	6-10	6-10	palisadeam.com
27	Galapagos Partners	Houston	TX	\$335.87	\$279.10	1-5	1-5	gplp.com
28	Trinity Portfolio Advisors	Fort Worth	TX	\$325.99	\$325.99	11-50	11-50	thegroup.org
29	Yeske Buie	Vienna	VA	\$325.84	\$325.84	6-10	1-5	davidyeske.com
30	Pure Financial Advisors	San Diego	CA	\$322.89	\$319.92	11-50	11-50	purefinancial.com
31	O'Brien Management	Cambridge	MA	\$321.51	\$321.51	6-10	6-10	obrienmanagement.com
32	Carnegie Investment Counsel	Beachwood	OH	\$313.60	\$313.60	6-10	6-10	carnegie-capital.com
33	Quorum Investment Counsel	Miami	FL	\$313.00	\$313.00	1-5	1-5	quorumcounsel.com
34	Spectrum Mgmt. Group	Indianapolis	IN	\$306.98	\$306.98	6-10	1-5	spectrum-mgmt.com
35	Empirical Wealth Mgmt.	Seattle	WA	\$291.13	\$291.13	6-10	1-5	empiradio.com
36	DLS Capital Mgmt.	Bannockburn	IL	\$274.50	\$274.50	1-5	1-5	dlscapital.net
37	Evermay Wealth Mgmt.	Washington	DC	\$269.21	\$269.21	6-10	1-5	evermaywealth.com
38	Bienville Capital Mgmt.	New York	NY	\$260.94	\$260.94	6-10	1-5	bienvillecapital.com
39	Sundance Advisors	Pittsburgh	PA	\$250.00	\$225.00	1-5	1-5	N/A
40	Keats, Connelly & Assocs.	Phoenix	AZ	\$248.76	\$248.76	11-50	11-50	keatsconnelly.ca
41	Summit Wealth Mgmt.	Orlando	FL	\$243.88	\$211.64	6-10	1-5	mysummitwealth.com
42	Wanger Omniwealth	Chicago	IL	\$241.20	\$241.20	6-10	6-10	wangeromniwealth.com
43	McNamara Financial Services	Marshfield	MA	\$236.69	\$236.69	6-10	1-5	mcnamarafinancial.com
44	Etesian Wealth Advisors	Lake Oswego	OR	\$231.57	\$231.57	6-10	1-5	etesianwealthadvisors.com
45	The Mather Group	Oakbrook Terrace	IL	\$224.00	\$224.00	1-5	1-5	themathergroup.com
46	Kavar Capital Partners	Leawood	KS	\$210.51	\$210.51	1-5	1-5	kavarcapital.com
47	Garde Capital	Seattle	WA	\$206.70	\$206.70	6-10	6-10	gardecapital.com
48	Bridgewater Wealth & Financial Mgmt.	Bethesda	MD	\$202.67	\$202.67	6-10	1-5	bridgewaterwealth.com
49	Yellowbrickroad Financial Advisors	San Francisco	CA	\$198.97	\$198.97	6-10	1-5	ybrfinancialadvisors.com
50	The Insight Group	Salt Lake City	UT	\$197.00	\$197.00	6-10	6-10	insightgroup.com

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