

FA

FINANCIAL ADVISOR

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New Annuities Aimed At Getting Their Business

JULY 2011



RIA SURVEY & RANKING 2011

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FA'S 2011 RIA RANKING (By Total Assets)

2010 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2010 ASSETS (\$MM)	% GROWTH IN ASSETS 2009-2010	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION							
92	Brouwer & Janachowski	Tiburon, Calif.	972.91	5.56	2.41	-2.01	7.73
93	Banyan Partners	Palm Beach Gardens, Fla.	971.03	120.12	4.41	91.11	15.18
94	EP Wealth Advisors	Torrance, Calif.	965.00	27.81	0.90	4.52	22.29
95	Modera Wealth Management	Westwood, N.J.	964.45	105.40	1.88	2.50	100.39
96	Sage Financial Group	Conshohocken, Pa.	957.68	13.35	1.90	7.72	5.23
97	Filament	Seattle, Wash.	940.86	19.72	24.76	7.12	11.76
98	SVA Wealth Management	Madison, Wis.	929.75	19.04	1.12	19.33	-0.24
99	Bridgewater Advisors	New York, N.Y.	899.87	13.55	2.43	9.56	3.64
100	Lee Financial Corp.	Dallas, Texas	898.94	7.55	2.95	3.67	3.74
101	Resource Consulting Group	Orlando, Fla.	892.22	15.92	2.91	11.39	4.07
102	Whitnell & Co.	Oak Brook, Ill.	873.00	8.23	2.39	2.30	5.80
103	Carlson Capital Management	Northfield, Minn.	836.90	14.68	1.59	9.88	4.37
104	Pinnacle Advisory Group	Columbia, Md.	836.90	21.10	1.29	11.78	8.33
105	SYM Financial Advisors	Winona Lake, Ind.	826.36	34.80	1.41	28.35	5.03
106	JFS Wealth Advisors	Hermitage, Pa.	816.35	9.22	1.01	5.42	3.60
107	Brightworth	Atlanta, Ga.	803.57	16.27	2.22	10.17	5.54
108	Legacy Wealth Management	Memphis, Tenn.	782.46	18.38	1.29	2.61	15.37
109	Strategic Wealth Partners	Deerfield, Ill.	778.71	15.92	2.56	6.39	8.96
110	West Financial Services	McLean, Va.	773.23	6.97	1.50	5.11	1.77
111	Guyasuta Investment Advisors	Pittsburgh, Pa.	747.00	13.53	3.25	2.17	11.11
112	Acropolis Investment Management	Chesterfield, Mo.	745.28	-3.01	1.72	-11.53	9.62
113	The Karras Company	Roy, Utah	738.75	1.67	3.73	-6.03	8.20
114	Stonebridge Capital Advisors	St. Paul, Minn.	732.02	-2.62	1.04	-3.17	0.57
115	Sargent Bickham Lagudis	Boulder, Colo.	731.89	41.62	2.32	33.52	6.06
116	Private Ocean	San Rafael, Calif.	726.85	10.47	1.71	7.87	2.41
117	Quest Capital Management	Dallas, Texas	726.04	6.53	0.83	48.07	-28.06
118	ProVise Management Group	Clearwater, Fla.	712.80	8.16	1.28	4.49	3.52
119	Strategic Wealth Management Group	Columbia, Md.	712.30	9.25	0.99	6.97	2.13
120	Hamilton Capital Management	Columbus, Ohio	708.68	9.95	1.02	8.52	1.32
121	American Economic Planning Group	Waren, N.J.	691.00	26.09	1.79	23.16	2.38
122	Albion Financial Group	Salt Lake City, Utah	665.60	26.06	2.66	17.99	6.84
123	CFS Investment Advisory Services	Totowa, N.J.	662.07	12.70	1.88	9.50	2.92
124	Evensky & Katz	Coral Gables, Fla.	658.65	10.80	2.56	9.08	1.58
125	Foster and Motley	Cincinnati, Ohio	654.82	13.09	1.87	10.83	2.04
126	Strategic Financial services	Utica, N.Y.	651.10	-0.53	0.47	-4.08	3.70
127	Forum Financial Management	Lombard, Ill.	649.82	90.14	0.68	10.08	72.73
128	Resnick Investment Advisors	Westport, Conn.	642.40	8.51	0.72	3.87	4.47
129	Tanglewood Wealth Management	Houston, Texas	636.54	13.39	1.55	7.86	5.13
130	BSW Wealth Partners	Boulder, Colo.	635.00	14.89	3.18	-8.09	25.00
131	Brinton Eaton Wealth Advisors	Madison, N.J.	631.16	12.56	2.48	13.89	-1.17
132	Abacus Planning Group	Columbia, S.C.	625.53	15.85	3.72	12.40	3.07
133	Fairway Wealth Management	Independence, Ohio	624.70	8.64	6.25	6.47	2.04
134	Heritage Financial Services	Norwood, Mass.	615.00	19.53	0.97	12.95	5.83
135	National Asset Management	Seattle, Wash.	606.03	62.98	0.20	60.91	1.29
136	Cypress Wealth Advisors	San Francisco, Calif.	599.72	31.99	10.90	3.19	27.91

*Discretionary and nondiscretionary assets under management reported on Form ADV. **Average assets per client relationship. † Founded in 2009 or 2010, not meaningful.

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