

Make This the Year

If you've resolved to change broker/dealers, there's a lot riding on your decision.
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[AMERICA'S TOP RIAS]

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Firm	City	Phone	Website	Total AUM (millions)	Total Accounts	Number of investment advisors	Number of clients
1 Veritable LP	Newtown Square, PA	610-640-9551	www.veritablelp.com	\$8,442	1,558	11-50	> 500
2 Oxford Financial Group, Ltd	Carmel, IN	317-843-5678	www.ofgltd.com	\$7,867	4,200	11-50	> 500
3 Silvercrest Asset Management Group, LLC	New York	212-649-0600	www.silvercrestgroup.com	\$7,305	1,995	11-50	> 500
4 Lowry Hill Investment Advisors Inc.	Minneapolis	612-667-1764	www.lowryhill.com	\$6,639	2,066	11-50	1-10
5 Convergent Wealth Advisors, LLC	Rockville, MD	301-770-6300	www.convergentwealth.com	\$5,859	4,621	11-50	n/a
6 Moneta Group Investment Advisors, LLC	Clayton, MO	314-726-2300	www.monetagrroup.com	\$5,772	11,582	11-50	> 500
7 Plante Moran Financial Advisors	Southfield, MI	248-223-3400	www.pmfa.com	\$5,365	1,332	11-50	> 500
8 Tag Associates, LLC	New York	212-275-1500	www.tagassoc.com	\$5,072	945	11-50	101-250
9 Loring, Wolcott & Coolidge	Boston	617-523-6531	www.lwcotrust.com	\$5,068	2,722	11-50	> 500
10 Kochis Fitz Quintile Investment Advisors, LLC	San Francisco	415-394-6670	www.quintile.com	\$4,961	486	11-50	251-500
11 Ronald Blue & Co., LLC	Atlanta	404-705-7000	www.ronblue.com	\$4,923	9,011	51-250	> 500
12 Integrated Wealth Management, LLC	Scottsdale, AZ	480-663-6000	www.iwmlc.com	\$4,696	194	n/a	101-250
13 Federal Street Advisors Inc.	Boston	617-350-8999	www.federalstreet.com	\$4,503	1,579	11-50	26-100

14 Sontag Advisory, LLC	New York	212-973-1200	www.sontagadvisory.com	\$4,195	6,606	6-10	> 500
15 SCS Capital Management, LLC	Waltham, MA	781-290-4400	www.scsfinancial.com	\$4,091	67	11-50	26-100
16 MBO Cleary Advisors Inc.	Milwaukee	414-291-3848	www.mboclarey.com	\$4,067	79	6-10	26-100
17 Fiduciary Counselling Inc.	St. Paul	651-228-0935	www.fidcouns.net	\$3,836	1,102	11-50	> 500
18 Greycourt & Co., Inc.	Pittsburgh	412-361-0100	www.greycourt.com	\$3,649	59	11-50	26-100
19 KLS Professional Advisors Group, LLC	New York	212-355-0346	www.klsadvisors.com	\$3,419	4,885	6-10	> 500
20 BBR Partners, LLC	New York	212-313-9870	www.bbrpartners.com	\$3,342	491	6-10	251-500
21 WTAS, LLC	Mclean, VA	571-382-0020	www.wtas.com	\$3,276	189	11-50	101-250
22 Calibre Advisory Services, Inc.	Waltham, MA	781-392-2840	www.calibre.com	\$3,267	2,188	11-50	251-500
23 Geller Family Office Services, LLC	New York	212-583-6000	www.gellerco.com	\$3,266	291	6-10	26-100
24 Shepherd Kaplan, LLC	Boston	617-896-1600	www.sk-llc.com	\$3,037	874	6-10	101-250
25 Baker Street Advisors, LLC	San Francisco	415-344-6180	www.bakerstreetadvisors.com	\$2,857	645	6-10	26-100
26 Inverness Counsel Inc.	New York	212-207-2100	www.invernesscounsel.com	\$2,844	1,252	11-50	> 500
27 Clarfeld Financial Advisors Inc.	Tarrytown, NY	914-846-0100	www.clarfeld.com	\$2,830	2,150	11-50	251-500
28 Athena Capital Advisors, LLC	Lincoln, MA	781-274-9300	www.athenacapital.com	\$2,684	134	11-50	26-100
29 Altair Advisers, LLC	Chicago	312-429-3000	www.altairadvisers.com	\$2,584	163	11-50	101-250
30 MyCIO Wealth Partners, LLC	Philadelphia	267-295-2280	www.myciowp.com	\$2,426	1,277	11-50	251-500
31 GW & Wade Inc.	Wellesley, MA	781-239-1188	www.gwwade.com	\$2,397	4,830	11-50	> 500
32 Gresham Partners, LLC	Chicago	312-960-0200	www.greshampartners.com	\$2,352	93	11-50	26-100
33 Cornerstone Advisors Inc.	Bellevue, WA	425-646-7600	www.buildbeyond.com	\$2,054	1,857	11-50	251-500
34 Ballamor Capital Management, Inc.	Radnor, PA	484-598-2500	www.ballamorcapital.com	\$2,045	83	1-5	26-100
35 Schultz Collins Lawson Chambers	San Francisco	415-291-3000	www.schultzcollins.com	\$1,988	188	6-10	101-250
36 R. M. Davis, Inc.	Portland	207-774-0022	www.rmdavis.com	\$1,987	2,978	11-50	> 500
37 Tolleson Private Wealth Management	Dallas	214-252-3263	www.tollesonwealth.com	\$1,963	1,339	11-50	26-100
38 Prairie Capital Management, LLC	Kansas City, MO	816-531-1101	www.prairiecapital.com	\$1,934	1,063	6-10	101-250
39 Freestone Capital Management Inc.	Seattle	206-398-1100	www.freestonecapital.com	\$1,854	834	6-10	> 500
40 Edelman Financial Services, LLC	Fairfax, VA	703-818-0800	www.ricedelman.com	\$1,801	8,329	11-50	> 500

41 Evanson Asset Management, LLC	Carmel, VA	831-333-2060	www.evansonasset.com	\$1,793	2,140	1-5	251-500
42 Bingham, Osborn & Scarborough, LLC	San Francisco	415-781-8535	www.bosinvest.com	\$1,775	2,763	11-50	> 500
43 Inlign Wealth Management, LLC (GenSpring Family Offices)	Phoenix	602-385-3266	www.inlignwealth.com	\$1,773	787	11-50	26-100
44 Reinhart Partners, Inc.	Mequon, WI	262-241-2020	www.rm-capital.com	\$1,709	956	11-50	> 500
45 Ballentine Finn & Company Inc.	Wolfeboro, NH	603-569-1717	www.ballentine-finn.com	\$1,700	172	11-50	101-250
46 Kibble & Prentice Holding Company	Seattle	206-441-6300	www.kpcom.com	\$1,649	416	11-50	251-500
47 Lee Financial	Dallas	972-960-1001	www.leefincorp.com	\$1,646	1,610	11-50	251-500
48 Mason Investment Advisory Services Inc.	Reston	703-716-6000	www.masoncompanies.com	\$1,643	463	11-50	> 500
49 Paul Comstock Partners	Houston	713-977-2694	www.paulcomstockpartners.com	\$1,638	121	6-10	101-250
50 Hale And Dorr Wealth Advisors	Boston	617-526-5801	www.haledorrwealth.com	\$1,621	1,316	11-50	> 500
51 Homrich & Berg	Atlanta	404-264-1400	www.homrich-berg.com	\$1,594	2,213	11-50	251-500
52 Threshold Group, LLC	Gig Harbor, WA	253-851-4300	www.thresholdgroup.com	\$1,564	155	11-50	26-100
53 Laird Norton Tye Asset Strategies, LLC	Seattle	206-464-5100	www.lntyee.com	\$1,551	1,227	11-50	101-250
54 The MDE Group, Inc.	Morristown, NJ	973-206-7100	www.mdegrou.com	\$1,547	1,706	6-10	101-250
55 RegentAtlantic Capital, LLC	Chatham, NJ	973-635-7070	www.regentatlantic.com	\$1,546	924	11-50	> 500
56 Merriman Berkman Next, Inc.	Seattle	206-285-8877	www.merrimancapital.com	\$1,507	5,500	11-50	> 500
57 Joel Isaacson & Co., Inc.	New York	212-302-6300	www.joelisaacson.com	\$1,373	2,417	11-50	> 500
58 Capital Investment Counsel Inc.	Denver	303-329-9000	www.cicinvestments.com	\$1,346	2,791	11-50	> 500
59 Balasa Dinverno & Foltz, LLC	Itasca, IL	630-875-4900	www.bdfllc.com	\$1,306	2,509	11-50	> 500
60 Manchester Capital Management, LLC	Manchester, VT	802-362-4410	www.mcmlc.com	\$1,292	589	6-10	101-250
61 Palisades Hudson Asset Management, L.P.	Scarsdale, NY	914-723-5000	www.palisadeshudson.com	\$1,278	65	6-10	26-100
62 Plancorp, Inc.	Saint Louis	636-532-7824	www.plancorp.com	\$1,277	2,224	11-50	251-500
63 Savant Capital Management, Inc.	Rockford, IL	815-227-0300	www.savantcapital.com	\$1,235	1,461	11-50	> 500
64 Halbert, Hargrove / Russell, LLC	Long Beach, CA	562-435-5657	www.halberthargrove.com	\$1,228	1,532	11-50	> 500
65 BKD Wealth Advisors, LLC	Springfield, MO	417-831-7283	www.bkd.com	\$1,224	2,582	11-50	> 500

66 Partners Capital Investment Group, LLC	Boston	617-292-2570	www.partners-cap.com	\$1,203	158	11-50	101-250
67 Brighton Jones, LLC	Seattle	206-329-5546	www.brightonjones.com	\$1,200	300	11-50	251-500
68 Foundation Resource Management, Inc.	Little Rock, AR	501-604-3190	www.foundationresourcemanagement.com	\$1,190	96	1-5	26-100
69 Wescott Financial Advisory Group, LLC	Philadelphia	215-979-1600	www.wescott.com	\$1,181	254	11-50	251-500
70 JMG Financial Group Ltd	Oak Brook, IL	630-571-5252	www.imgfinancial.com	\$1,180	1,782	11-50	> 500
71 Arlington Partners, LLC	Birmingham	205-488-4300	www.arlingtonpartners.com	\$1,179	902	6-10	26-100
72 Northside Capital Management, LLC	Hood River, OR	541-387-2080	www.northsidecap.com	\$1,178	16	1-5	11-25
73 Zemenick & Walker Inc.	St Louis	314-862-5525	www.zandw.com	1,173	162	6-10	101-250
74 Dowling & Yahnke, LLC	San Diego	858-509-9500	www.dyinc.com	\$1,163	2,028	6-10	> 500
75 SEIA	Los Angeles	310-712-2323	www.seiallc.com	\$1,157	3,280	11-50	> 500
76 Robertson, Griego & Thoele	Dallas	214-360-7000	www.rgtnet.com	\$1,150	245	6-10	101-250
77 Budros, Ruhlin & Roe, Inc.	Columbus	614-481-6900	www.b-r-r.com	\$1,143	3,968	11-50	251-500
78 Rinet Company, LLC	Boston	617-488-2700	www.rinetco.com	\$1,128	1,293	11-50	101-250
79 The Scarborough Group, Inc.	Annapolis, MD	410-573-5700	www.401kadvice.com	\$1,108	4,532	11-50	> 500
80 Capital Investment Management Inc.	Leitchfield, KY	270-259-0769	www.cimky.com	\$1,100	453	n/a	251-500
81 RCL Advisors, LLC	New York	212-452-5900	www.rcladvisors.com	\$1,100	552	1-5	26-100
82 Pacific Portfolio Consulting, LLC	Seattle	206-623-6641	www.pacific-portfolio.com	\$1,096	256	6-10	251-500
83 Mintz Levin Financial Advisors, LLC	Boston	617-542-6000	www.mintzlevinfinancial.com	\$1,094	364	11-50	251-500
84 Coldstream Capital Management Inc.	Bellevue, WA	425-283-1600	www.coldstream.com	\$1,086	600	11-50	> 500
85 The Colony Group, LLC	Boston	617-723-8200	www.thecolonygroup.com	\$1,083	1,539	11-50	> 500
86 Resource Consulting Group	Orlando	407-422-0252	www.resourceconsulting.com	\$1,059	1,371	6-10	251-500
87 Cypress Wealth Advisors	San Francisco	415-489-2100	www.cypresswealth.com	\$1,058	108	1-5	26-100
88 Fairport Asset Management	Cleveland	216-431-3000	www.fairportasset.com	\$1,054	1,118	11-50	> 500
89 North American Management Corp	Boston	617-695-2100	www.namcorp.com	\$1,046	1,049	6-10	251-500
90 McCabe Capital Managers, Ltd.	King Of Prussia, PA	610-277-8890	www.mccabecapital.com	\$1,034	116	1-5	101-250

91 Molewski Financial Partners	Bethlehem, PA	610-865-2600	www.molewskifinancial.com	\$1,028	484	6-10	26-100
92 Moss Adams Wealth Advisors, LLC	Seattle	206-302-6717	www.mossadamswealthadvisors.com	\$1,016	2,554	11-50	> 500
93 Wealth Enhancement Advisory Services, LLC	Wayzata, MN	952-449-9579	www.wealthenhancement.com	\$997	7,753	51-250	> 500
94 The Milestone Group, Inc.	Denver	303-539-0100	www.themilestonegroup.com	\$969	751	6-10	01-250
95 Beaumont Financial Partners, LLC	Wellesley Hills, MA	781-237-7170	www.bfpartners.com	\$952	1,650	6-10	251-500
96 HBK Sorce Advisory, LLC	Erie, PA	814-836-5776	www.hbksorce.com	\$950	4,013	11-50	> 500
97 Financial Clarity, Inc.	Mountain View, CA	650-559-9900	www.financialclarity.com	\$950	32	1-5	26-100
98 TCI Wealth Management, Inc.	Tucson	520-733-1477	www.tciwealth.com	\$932	2,769	6-10	> 500
99 Signature Financial Management Inc.	Norfolk, VA	757-625-7670	www.sigfin.com	\$929	286	6-10	26-100
100 WFG Advisors, LP	Dallas	972-661-8700	www.wmfingrp.com	\$927	1,155	11-50	> 500

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