

# Top 10 Fastest-Growing Firms (By Asset Category)

	GROWTH RANK	FIRM NAME	LOCATION	% GROWTH IN ASSETS 2006-2007	YEAR END 2007 ASSETS (\$MM)
\$1 Billion And Over	1	myCIO Wealth Partners	Philadelphia, Pa.	85.92	4,510.60
	2	The Mutual Fund Store	Overland Park, Kan.	54.37	4,078.44
	3	Index Funds Advisors	Irvine, Calif.	50.63	1,058.92
	4	Moneta Group Investment Advisors	St. Louis, Mo.	37.43	7,932.46
	5	Signature Estate & Investment Advisors	Los Angeles, Calif.	35.26	1,376.90
	6	Plante Moran Financial Advisors	Southfield, Mich.	34.19	5,364.89
	7	GenSpring Family Offices	Palm Beach Gardens, Fla.	33.01	13,132.95
	8	Presidio Wealth Management	San Francisco, Calif.	31.49	3,813.16
	9	Ballentine Finn & Company	Wolfeboro, N.H.	30.33	1,995.00
	10	Westcott Financial Advisory Group	Philadelphia, Pa.	27.08	1,525.00
\$500 Million To \$1 Billion	1	Greenwich Wealth Management	Greenwich, Conn.	2,428.57	885.00
	2	Rehmann Financial	Lansing, Mich.	710.78	564.58
	3	Whitnell & Company	Oak Brook, Ill.	95.69	747.69
	4	Patriot Wealth Management	Houston, Tex.	43.20	649.27
	5	Legacy Wealth Management	Memphis, Tenn.	38.23	573.37
	6	Fairway Wealth Management	Cleveland, Ohio	38.11	540.01
	7	CFS Investment Advisory Services	Totowa, N.J.	33.70	631.22
	8	Cassaday & Company	McLean, Va.	25.29	918.01
	9	Brinton Eaton Wealth Advisors	Morristown, N.J.	24.95	538.03
	10	Abacus Wealth Partners	Sebastopol, Calif.	23.44	808.37
\$300 Million To \$500 Million	1	IPI Asset Management	Decatur, Ill.	346.83	428.44
	2	Horan Capital Management	Baltimore, Md.	110.53	480.00
	3	RG Capital	Scottsdale, Ariz.	108.33	450.01
	4	Sovereign Wealth Management	Memphis, Tenn.	64.55	449.33
	5	Camden Capital Management	El Segundo, Calif.	50.00	300.00
	6	JWA Financial Group	Dallas, Tex.	40.37	413.58
	7	Burns Advisory Group	Oklahoma City, Okla.	39.93	323.10
	8	Heritage Financial Service	Norwood, Mass.	33.33	440.00
	9	New England Investment & Retirement Group	North Andover, Mass.	28.80	322.00
	10	Legend Financial Advisors	Pittsburgh, Pa.	28.60	323.97
\$100 Million To \$300 Million	1	Stevens First Principles Investment Advisors	Newport Beach, Calif.	689.54	233.00
	2	Wealthquest Corporation	Cincinnati, Ohio	163.08	171.00
	3	Nixon Peabody Financial Advisors	Rochester, N.Y.	151.22	152.26
	4	McKinley Carter Wealth Services	Wheeling, W. Va.	145.95	294.90
	5	JW Coons Advisors	Columbus, Ohio	127.72	104.04
	6	Corestates Capital Advisors	Newtown, Pa.	121.53	295.35
	7	CRA Financial Services	Northfield, N.J.	110.00	211.27
	8	Wealth Health	Roseland, N.J.	85.45	102.00
	9	Hallett & Associates	Port Angeles, Wash.	83.52	162.00
	10	Edge Portfolio Management	Winfield, Ill.	81.82	100.00
\$75 Million To \$100 Million	1	Vermillion Financial Advisors	South Barrington, Ill.	376.47	81.00
	2	Century Wealth Management	Memphis, Tenn.	140.71	88.76
	3	Triton Wealth Management	Annapolis, Md.	35.97	84.30
	4	Allen Capital Group	Grand Island, Neb.	31.22	82.51
	5	Salem Partners Wealth Management	Los Angeles, Calif.	27.99	78.07
	6	Family Wealth Advisory Group	Cincinnati, Ohio	26.31	77.78
	7	Dorman Financial Management	Maitland, Fla.	25.00	95.00
	8	F.I.G. Financial Advisory Services	Edmond, Okla.	23.96	88.56
	9	JVL Associates	Wyoming, Mich.	22.54	97.30
	10	Caton Financial	Larkspur, Calif.	21.63	95.73

Source: Discovery

# FA's 2008 RIA Ranking (By Total Assets)

2007 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2007 ASSETS (\$MM)	% GROWTH IN ASSETS 2006-2007	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	RANK IN ASSETS PER CLIENT
<b>ASSET CATEGORY: \$1 BILLION AND OVER</b>							
1	GenSpring Family Offices	Palm Beach Gardens, Fla.	13,132.95	33.01	22.76	-16.55	7
2	Moneta Group Investment Advisors	St. Louis, Mo.	7,932.46	37.43	3.71	37.10	41
3	Convergent Wealth Advisors	Rockville, Md.	6,219.13	16.09	25.38	-1.91	6
4	Ronald Blue and Company	Atlanta, Ga.	5,420.14	10.09	0.80	-10.43	272
5	Plante Moran Financial Advisors	Southfield, Mich.	5,364.89	34.19	4.03	11.22	36
6	Aspiriant***	San Francisco, Calif.	5,074.03	18.52	14.41	15.84	13
7	myCIO Wealth Partners	Philadelphia, Pa.	4,510.60	85.92	15.34	18.89	11
8	The Mutual Fund Store	Overland Park, Kan.	4,078.44	54.37	0.20	0.73	377
9	Heber Fuger Wendin	Bloomfield Hills, Mich.	3,827.19	-4.74	34.79	3.06	2
10	Presidio Wealth Management	San Francisco, Calif.	3,813.16	31.49	25.59	34.12	5
11	Edelman Financial Services	Fairfax, Va.	3,800.00	18.75	0.46	10.11	344
12	BBR Partners	New York, N.Y.	3,611.22	8.05	60.19	4.45	1
13	Mercer Advisors	Scottsdale, Ariz.	3,524.00	2.74	1.01	14.89	231
14	Innovest Portfolio Solutions	Denver, Colo.	3,496.33	0.33	29.14	-8.03	4
15	RSM McGladrey	Minneapolis, Minn.	3,400.00	3,400.00	21.43	1.10	11.21
16	Bartlett & Co.	Cincinnati, Ohio	3,381.60	-6.92	3.91	16.03	38
17	Clarfeld Financial Advisors	Tarrytown, N.Y.	3,200.30	15.08	12.80	10.48	16
18	Symmetry Partners	Glastonbury, Conn.	3,016.81	15.99	0.34	0.52	362
19	Altair Advisers	Chicago, Ill.	2,780.03	7.60	14.95	-5.71	12
20	Hewins Financial/Wipfli Hewins Investment	San Mateo, Calif.	2,250.00	20.51	5.08	3.38	31
21	Bingham Osborn & Scarborough	San Francisco, Calif.	2,092.50	18.37	2.84	9.53	61
22	Homrich & Berg	Atlanta, Ga.	1,983.65	24.42	5.25	13.23	30
23	Ballentine Finn & Company	Wolfeboro, N.H.	1,955.00	30.33	17.77	12.56	9
24	Northeast Financial Consultants	Westport, Conn.	1,915.47	2.28	10.82	1.12	17
25	RegentAtlantic Capital	Chatham, N.J.	1,838.88	18.95	2.12	-13.53	87
26	Buckingham Asset Management	St Louis, Mo.	1,770.92	4.90	1.39	-8.54	157
27	Joel Isaacson & Co.	New York, N.Y.	1,625.00	18.35	2.46	7.59	70
28	The MDE Group	Morristown, N.J.	1,585.00	2.92	9.32	2.92	19
29	Wescott Financial Advisory Group	Philadelphia, Pa.	1,525.00	27.08	6.25	26.04	26
30	Savant Capital Management	Rockford, Ill.	1,515.38	22.70	0.86	-1.67	259
31	Brighton Jones	Seattle, Wash.	1,504.09	7.43	4.61	-11.68	35
32	Balasa Dinverno Foltz	Itasca, Ill.	1,488.21	1.16	2.06	-5.00	90
33	Signature Estate & Investment Advisors	Los Angeles, Calif.	1,376.90	35.26	0.88	3.81	255
34	Budros Ruhlin & Roe	Columbus, Ohio	1,369.95	19.90	2.74	-6.48	64
35	Dowling & Yahnke	San Diego, Calif.	1,331.61	14.54	2.01	8.65	93
36	Highmount Capital	New York, N.Y.	1,302.44	3.40	22.08	10.41	8
37	WealthTrust-Arizona	Scottsdale, Ariz.	1,296.40	-5.58	2.26	-5.58	80
38	Ameritas Investment Corp.	Lincoln, Neb.	1,272.93	12.15	0.15	-5.29	382
39	The Keller Group Investment Management	Irvine, Calif.	1,247.80	10.85	1.32	4.88	172
40	Zemenick & Walker	St Louis, Mo.	1,227.88	4.66	7.10	-2.00	23
41	Mintz Levin Financial Advisors	Boston, Mass.	1,200.00	14.29	3.57	10.20	42
42	Mezzacappa Management	New York, N.Y.	1,200.00	9.09	14.12	-21.71	14
43	The Colony Group	Boston, Mass.	1,155.55	19.16	1.52	17.27	134
44	Strategic Financial Services	Utica, N.Y.	1,150.00	21.69	0.79	8.07	275
45	JMG Financial Group	Oak Brook, Ill.	1,118.45	-5.24	2.03	2.69	91
46	Coldstream Capital Management	Bellevue, Wash.	1,118.32	2.98	1.99	14.14	95

Source: Discovery

\*Discretionary and nondiscretionary assets under management reported on Form ADV. \*\*Average assets per client relationship.

\*\*\*Aspirant is the new name for the firm created by the merger of Kochis Fitz of San Francisco and Quintile Investment Advisors of Los Angeles. All results represent the combination of both firms. In 2006, Kochis Fitz reported \$2,292.92 million in assets and 309 clients and Quintile reported \$1,988.11 million in assets and 35 clients.

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47	Resource Consulting Group	Orlando, Fla.	1,095.09	3.44	3.57	-1.95	43
48	RCL Advisors	New York, N.Y.	1,077.00	16.43	13.30	7.81	15
49	Index Funds Advisors	Irvine, Calif.	1,058.92	50.63	0.73	19.46	291
50	Honkamp Krueger Financial Services	Dubuque, Iowa	1,050.39	20.55	0.47	9.83	341
51	HBK Sorce Financial	Erie, Pa.	1,016.59	12.14	0.28	9.03	369
52	F&D Advisors	Atlanta, Ga.	1,001.27	15.61	3.00	3.50	55
<b>ASSET CATEGORY: \$500 MILLION TO &lt; \$1 BILLION</b>							
53	Lee Financial Corporation	Dallas, Texas	995.44	12.33	2.21	8.59	84
54	Parsec Financial Management	Asheville, N.C.	991.19	14.13	1.01	8.32	230
55	Morton Capital Management	Calabasas, Calif.	958.14	7.40	1.92	-7.45	103
56	Foster Group	West Des Moines, Iowa	955.37	12.36	1.28	1.70	175
57	Sage Financial Group	West Conshohocken, Pa.	925.00	16.35	1.93	4.23	102
58	Cassaday & Company	McLean, Va.	918.01	25.29	1.26	23.05	181
59	Harold C. Brown & Co.	Buffalo, N.Y.	893.22	7.32	0.84	8.22	265
60	Carlson Capital Management	Northfield, Minn.	891.26	16.06	1.64	4.52	126
61	Centaurus Financial	Orange, Calif.	890.00	-1.11	0.74	-13.47	287
62	Greenwich Wealth Management	Greenwich, Conn.	885.00	2,428.57	17.70	1,670.00	10
63	JFS Wealth Advisors	Hermitage, Pa.	836.43	13.16	1.21	3.70	190
64	McQueen Ball & Associates	Bethlehem, Pa.	836.10	8.35	2.83	2.47	62
65	Moss Adams Wealth Advisors	Seattle, Wash.	833.77	-17.97	0.40	1.60	350
66	Acropolis Investment Management	Saint Louis, Mo.	812.66	4.23	2.23	-18.33	82
67	Abacus Wealth Partners	Sebastopol, Calif.	808.37	23.44	3.91	21.05	39
68	Stoker Ostler Wealth Advisors	Scottsdale, Ariz.	770.21	8.76	1.60	-4.55	128
69	Truepoint	Cincinnati, Ohio	769.92	15.43	2.52	27.54	68
70	SYM Financial Advisors	Warsaw, Ind.	760.70	15.52	1.38	9.04	160
71	FIM Group	Traverse City, Mich. <sup>755.76</sup>	21.71	0.60	7.57	309	
72	Brightworth	Atlanta, Ga.	752.39	18.57	2.57	-8.14	65
73	Foster & Motley	Cincinnati, Ohio	751.08	3.01	2.10	-3.90	88
74	Resource Management	Metairie, La.	750.00	15.38	2.38	17.22	74
75	Whitnell & Company	Oak Brook, Ill.	747.69	95.69	3.29	-23.27	49
76	ProVise Management Group	Clearwater, Fla.	743.12	12.88	1.37	4.95	162
77	Accredited Investors	Edina, Minn.	741.01	14.00	2.96	-7.21	58
78	The Karras Company	Roy, Utah	741.00	6.93	5.49	23.56	29
79	Hamilton Capital Management	Columbus, Ohio	738.64	9.30	1.09	6.39	211
80	West Financial Services	McLean, Va.	719.74	6.15	1.51	1.91	136
81	Guyasuta Investment Advisors	Pittsburgh, Pa.	705.89	3.66	3.80	0.87	40
82	Brouwer & Janachowski	Tiburon, Calif.	689.93	-4.19	2.99	4.52	56
83	Obermeyer Asset Management Company	Aspen, Colo.	682.85	23.07	1.78	14.39	112
84	Capital Performance Advisors	Walnut Creek, Calif.	674.72	10.35	1.07	4.21	214
85	WESCAP Management Group	Burbank, Calif.	664.18	17.36	2.16	12.41	85
86	Gerstein Fisher	New York, N.Y.	660.00	17.65	1.02	-0.45	227
87	American Economic Planning Group	Watchung, N.J.	651.60	8.01	1.51	11.77	137
88	StrategicPoint Investment Advisors	Providence, R.I.	650.40	9.02	0.51	12.29	330
89	Patriot Wealth Management	Houston, Tex.	649.27	43.20	2.29	23.53	79
90	Stonebridge Capital Advisors	Saint Paul, Minn.	631.50	22.53	0.85	-14.91	263
91	Paragon Capital Management	Denver, Colo.	631.34	10.91	5.05	6.47	32
92	CFS Investment Advisory Services	Totowa, N.J.	631.22	33.70	1.75	29.99	113
93	Strategic Wealth Management Group	Columbia, Md.	623.02	23.00	0.95	12.32	240
94	Spire Investment Partners	McLean, Va.	617.66	-5.43	1.99	79.40	96

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95	PensionTrend Investment Advisers	Okemos, Mich.	607.78	9.94	3.04	7.74	54
96	Lara Shull & May	Falls Church, Va.	600.50	9.08	0.50	-9.10	334
97	Lau Associates	Wilmington, Del.	600.00	7.14	4.65	-2.82	34
98	Pinnacle Advisory Group	Columbia, Md.	581.00	20.04	1.13	8.85	204
99	Legacy Wealth Management	Memphis, Tenn.	573.37	38.23	1.37	23.42	164
100	M. J. Smith and Associates	Englewood, Colo.	570.00	8.57	1.19	16.49	193
101	Diversified Management	Milwaukee, Wis.	569.24	9.16	3.54	5.77	44
102	Rehmann Financial	Lansing, Mich.	564.58	710.78	0.26	614.29	372
103	Evensky & Katz	Coral Gables, Fla.	552.00	10.40	2.40	0.80	73
104	Mt. Eden Investment Advisors	San Francisco, Calif.	551.20	-8.54	9.19	-0.92	20
105	Sigma Investment Counselors	Southfield, Mich.	545.00	8.57	1.27	11.35	177
106	Aegis Wealth Management	Bethesda, Md.	544.00	7.09	8.00	-11.81	21
107	Fairway Wealth Management	Cleveland, Ohio	540.01	38.11	6.59	16.21	25
108	Brinton Eaton Wealth Advisors	Morristown, N.J.	538.03	24.95	2.34	15.17	76
109	L.J. Altfest & Co.	New York, N.Y.	535.80	15.37	1.49	3.16	139
110	Filament	Seattle, Wash.	524.61	15.22	30.86	-18.67	3
111	Abacus Planning Group	Columbia, S.C.	524.59	21.77	3.45	9.75	47
112	Lindner Capital Advisors	Marietta, Ga.	522.48	22.66	0.35	-3.25	360
113	Hallmark Capital Management	Wayne, N.J.	511.54	9.14	1.73	9.51	116
114	Stanford Investment Group	Mountain View, Calif.	510.96	-1.05	1.69	1.57	121
115	Diesslin & Associates	Fort Worth, Tex.	501.00	8.21	1.52	1.65	135

## ASSET CATEGORY: \$300 MILLION TO <\$500 MILLION

116	Founders Financial Network	Cupertino, Calif.	482.55	10.87	6.03	-1.60	28
117	Summit Financial Strategies	Columbus, Ohio	480.15	20.63	1.22	10.17	187
118	Horan Capital Management	Baltimore, Md.	480.00	110.53	0.54	-14.07	321
119	The Monitor Group	McLean, Va.	461.85	4.75	2.33	1.05	77
120	Salient Wealth Management	San Rafael, Calif.	459.90	21.99	2.46	12.20	71
121	Briaud Financial Planning	Bryan, Tex.	459.78	11.65	1.92	13.51	104
122	R. E. Wacker Associates	San Luis Obispo, Calif.	459.44	25.13	1.11	-11.44	206
123	Retirement Investment Advisors	Oklahoma City, Okla.	454.95	17.38	0.53	10.28	325
124	Medley & Brown	Ridgeland, Miss.	453.00	10.90	1.00	5.27	232
125	RG Capital	Scottsdale, Ariz.	450.01	108.33	0.64	19.04	298
126	Sovereign Wealth Management	Memphis, Tenn.	449.33	64.55	2.38	11.44	75
127	Greenbaum and Orecchio	Old Tappan, N.J.	448.90	26.63	2.23	11.51	81
128	Mission Wealth Management	Santa Barbara, Calif.	448.52	6.00	1.16	-4.96	196
129	PDS Planning	Columbus, Ohio	440.05	10.78	1.32	1.50	171
130	Heritage Financial Service	Norwood, Mass.	440.00	33.33	1.10	16.67	210
131	IPI Asset Management	Decatur, Ill.	428.44	346.83	0.25	109.83	373
132	CPS Investment Advisors	Lakeland, Fla.	422.26	10.88	0.51	2.77	329
133	JWA Financial Group	Dallas, Tex.	413.58	40.37	1.03	9.64	226
134	Pinnacle Wealth Planning Services	Mansfield, Ohio	412.00	15.41	1.20	7.67	191
135	AMI Investment Management	Kendallville, Ind.	411.78	1.38	5.02	-1.10	33
136	Sharkey Howes & Javer	Denver, Colo.	408.25	16.80	0.42	1.37	349
137	Empirical Wealth Management	Portland, Ore.	406.57	17.54	0.84	17.06	264
138	Sadoff Investment Management	Milwaukee, Wis.	399.12	-0.01	0.95	3.09	239
139	Braver Wealth Management	Newton, Mass.	394.14	2.74	1.28	5.08	174
140	Stepp & Rothwell	Overland Park, Kan.	393.00	13.26	2.54	3.03	67
141	Mosaic Financial Partners	San Francisco, Calif.	388.08	20.36	1.81	13.61	111
142	Spero-Smith Investment Advisers	Cleveland, Ohio	386.05	7.96	1.44	11.58	149

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143	Vista Capital Partners	Portland, Ore.	385.99	11.35	1.57	3.20	130
144	Austin Asset Management Company	Austin, Tex.	383.13	19.70	1.18	11.22	194
145	Petersen Hastings	Kennewick, Wash.	381.61	1.60	0.93	26.39	247
146	Foldes Financial Management	Miami, Fla.	381.00	22.51	1.26	6.28	183
147	Back Bay Financial Group	Boston, Mass.	377.16	17.90	1.56	5.18	131
148	Westport Resources	Westport, Conn.	377.04	8.02	1.20	12.50	192
149	Smith Anglin Financial	Dallas, Tex.	375.00	22.95	1.07	-12.18	215
150	Eclectic Associates	Fullerton, Calif.	364.74	8.36	0.83	0.69	266
151	CJM Wealth Advisers	Fairfax, Va.	363.93	24.20	0.79	16.07	276
152	SFMG	Dallas, Tex.	358.64	-1.61	1.05	-14.55	221
153	Burt Associates	Rockville, Md.	358.25	8.60	1.94	2.15	101
154	Huber Financial Group	Buffalo Grove, Ill.	356.66	10.19	0.78	-27.34	279
155	Blankinship & Foster	Solana Beach, Calif.	355.70	6.95	1.43	7.38	150
156	The Sterling Group	Pasadena, Calif.	355.00	14.52	1.31	6.03	173
157	Warwick Partners	Bryan, Tex.	345.00	13.49	2.97	4.68	57
158	The Trust Company of Manhattan	Manhattan, Kan.	343.45	10.72	0.70	1.68	294
159	Hokanson Associates	Solana Beach, Calif.	339.39	20.11	1.44	20.11	148
160	Lassus Wherley	New Providence, N.J.	338.29	8.96	1.43	4.34	151
161	Weaver and Tidwell Financial Advisors	Dallas, Tex.	327.63	15.44	1.38	-6.48	159
162	Greystone Financial Group	Troy, Mich.	326.14	8.16	0.96	4.66	238
163	Legend Financial Advisors	Pittsburgh, Pa.	323.97	28.60	1.32	24.40	170
164	Burns Advisory Group	Oklahoma City, Okla.	323.10	39.93	0.79	17.64	277
165	New England Investment & Retirement Group	North Andover, Mass.	322.00	28.80	0.61	16.53	305
166	LJPR	Troy, Mich.	317.90	14.23	0.43	1.57	348
167	Sowell Management Services	North Little Rock, Ark.	317.43	20.15	0.31	-3.25	365
168	Jackson Financial Management	Costa Mesa, Calif.	310.03	-1.36	1.07	-10.20	216
169	MEDIQUS Asset Advisors	Chicago, Ill.	301.91	10.27	0.93	-1.30	246
170	Camden Capital Management	El Segundo, Calif.	300.00	50.00	7.50	12.50	22
<b>ASSET CATEGORY: \$100 MILLION TO &lt;\$300 MILLION</b>							
171	Capelli Financial Services	Bloomfield Hills, Mich.	299.31	8.80	1.85	6.78	110
172	Pacific Investment Advisors	Portland, Ore.	298.81	25.55	1.38	11.09	161
173	The Family Firm	Bethesda, Md.	297.83	14.75	2.07	-1.19	89
174	Rodgers & Associates	Lancaster, Pa.	295.57	16.16	0.76	9.61	283
175	Corestates Capital Advisors	Newtown, Pa.	295.35	121.53	0.74	80.55	289
176	McKinley Carter Wealth Services	Wheeling, W. Va.	294.90	145.95	0.56	20.66	316
177	Lodestar Private Asset Management	Alamo, Calif.	293.24	11.13	2.12	-0.95	86
178	Stevens Foster Financial Advisors	Bloomington, Minn.	293.00	14.90	0.91	4.23	249
179	Galecki Financial Management	Fort Wayne, Ind.	282.55	39.19	1.13	25.27	203
180	BHCO Capital Management	Dallas, Tex.	282.10	4.17	1.71	10.48	120
181	JNBA Financial Advisors	Minneapolis, Minn.	273.66	-0.19	0.60	-7.00	306
182	White Oaks Wealth Advisors	Minneapolis, Minn.	270.21	18.19	1.15	13.64	197
183	Sheaff Brock Investment Advisors	Indianapolis, Ind.	270.00	31.07	0.64	22.02	299
184	Buffington Mohr McNeal	Boise, Idaho	270.00	9.97	1.03	-7.31	224
185	Leisure Capital Management	Costa Mesa, Calif.	265.00	3.52	1.96	-13.35	98
186	Wade Financial Group	Minneapolis, Minn.	255.00	12.14	1.49	3.61	140
187	Fox Joss & Yankee	Reston, Va.	248.70	13.72	1.27	4.44	178
188	Lexington Wealth Management	Lexington, Mass.	247.00	39.55	1.73	23.93	118
189	Spraker Fitzgerald Tamayo & Moisand	Maitland, Fla.	245.63	9.01	0.74	5.71	286
190	GDM Advisory Group	Jenkintown, Pa.	244.00	16.19	1.22	13.29	188

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# FA's 2008 RIA Ranking (By Total Assets)

2007 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2007 ASSETS (\$MM)	% GROWTH IN ASSETS 2006-2007	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	RANK IN ASSETS PER CLIENT
191	TGS Financial Advisors	Radnor, Pa.	241.42	8.80	0.90	7.17	252
192	West Oak Capital	Westlake Village, Calif.	240.27	-15.20	3.48	-26.26	46
193	Investor's Capital Management	Menlo Park, Calif.	238.38	53.80	0.67	50.78	296
194	Patton Albertson & Miller	Macon, Ga.	238.00	50.63	1.41	-6.41	155
195	R.W. Rogé & Company	Bohemia, N.Y.	238.00	-1.65	0.86	-11.24	258
196	MPI Investment Management	Hinsdale, Ill.	235.54	20.17	1.96	-9.87	99
197	Financial Advantage	Columbia, Md.	235.38	7.23	1.48	3.86	144
198	Friedman & Associates	Novato, Calif.	234.28	7.85	1.71	3.13	119
199	Stevens First Principles Investment Advisors	Newport Beach, Calif.	233.00	689.54	1.21	493.18	189
200	The L. Warner Companies	Timonium, Md.	231.41	7.42	1.34	-13.07	168
201	Nelson Roberts Investment Advisors	East Palo Alto, Calif.	230.10	10.33	3.24	8.78	50
202	Investec Advisory Group	Houston, Tex.	230.08	13.20	3.07	2.64	53
203	Tellone Management Group	Anaheim Hills, Calif.	230.00	25.00	0.92	7.50	248
204	Charles Stephen and Company	Albuquerque, N.M.	223.95	15.52	0.89	9.07	253
205	RR Advisory Group	New York, N.Y.	223.65	56.19	0.93	30.16	245
206	Droms Strauss Advisors	St. Louis, Mo.	222.09	16.03	1.61	5.10	127
207	Weatherly Asset Management	Del Mar, Calif.	221.55	24.93	1.25	11.52	185
208	Schroeder Braxton & Vogt	Amherst, N.Y.	221.38	7.30	0.52	1.54	328
209	Smith & Howard Wealth Management	Atlanta, Ga.	220.54	16.13	1.53	0.81	133
210	Oak Financial Group	Stamford, Conn.	216.37	10.90	1.03	2.98	225
211	KHC Wealth Management Services	Overland Park, Kan.	216.00	16.76	1.39	-2.83	156
212	Investors Advisory Group	Waukesha, Wis.	212.00	7.07	0.50	1.46	332
213	CRA Financial Services	Northfield, N.J.	211.27	110.00	0.74	106.35	290
214	Krasney Financial	Mendham, N.J.	210.00	12.90	1.75	-4.97	115
215	Access Wealth Planning	Roseland, N.J.	204.75	2.32	0.34	-23.26	361
216	Mark J. Snyder Financial Services	Medford, N.Y.	203.60	20.94	0.50	15.88	333
217	The Joseph Group Capital Management	Columbus, Ohio	203.49	15.44	0.63	0.69	302
218	Heritage Wealth Management	San Diego, Calif.	203.00	+	1.02	+	122
219	Traphagen Investment Advisors	Oradell, N.J.	200.17	19.24	0.27	4.70	370
220	Partners Wealth Management	Burbank, Calif.	199.60	35.78	0.09	27.20	385
221	The Arkansas Financial Group	Little Rock, Ark.	198.71	10.89	1.10	-2.67	208
222	Rowling Dold & Associates	San Diego, Calif.	196.91	-4.98	1.23	-3.79	186
223	Ward & Associates	Rancho Santa Fe, Calif.	195.94	10.30	3.92	1.47	37
224	The Planning Center	Moline, Ill.	194.00	36.66	1.04	22.70	222
225	Asset Strategies	Casper, Wyo.	191.49	9.99	0.98	6.60	236
226	Camarda Financial Advisors	Orange Park, Fla.	191.29	15.94	0.37	-1.90	359
227	Lasecke Weil Wealth Advisory Group	Palo Alto, Calif.	190.99	17.00	1.07	6.48	213
228	Geier Asset Management	Marriottsville, Md.	190.04	0.48	1.27	11.19	180
229	Interactive Financial Advisors	Oak Brook, Ill.	187.00	32.62	0.05	-13.97	386
230	Jentner Financial Group	Akron, Ohio	186.06	11.51	1.49	4.38	141
231	Ray Mignone & Co.	Little Neck, N.Y.	185.94	10.68	1.43	4.72	152
232	Richard P. Slaughter Associates	Austin, Tex.	185.50	7.85	0.48	-1.96	338
233	DCA Global Wealth Management	Norcross, Ga.	184.97	13.15	2.31	4.66	78
234	Herbein Wealth Management	Wyomissing, Pa.	184.94	12.89	0.85	-0.12	261
235	Girard Partners	King of Prussia, Pa.	184.80	32.75	0.56	20.68	315
236	Trinity Financial Advisors	Chicago, Ill.	184.79	8.43	3.08	1.20	52
237	HC Financial Advisors	Lafayette, Calif.	184.49	13.76	1.14	11.65	201
238	LifePlan Financial Group	Miamisburg, Ohio	181.80	12.17	0.54	-1.94	320
239	Glass Jacobson Investment Advisory	Owings Mills, Md.	180.76	24.74	0.85	1.79	260
240	William Mack & Associates	Troy, Mich.	180.21	8.77	0.56	1.97	314

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# FA's 2008 RIA Ranking (By Total Assets)

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241	Bridgewater Wealth Management	Bethesda, Md.	180.02	23.61	1.89	11.90	106
242	Capital Management Group	Washington, D.C.	179.26	14.15	1.26	-5.95	182
243	New Century Financial Group	Princeton, N.J.	178.76	-2.43	0.44	15.31	346
244	Financial Planning & Information Services	De Pere, Wis.	177.64	22.67	0.40	2.09	351
245	Stonegate Wealth Management	Fair Lawn, N.J.	172.00	36.51	0.98	17.01	235
246	Wealthquest Corporation	Cincinnati, Ohio	171.00	163.08	0.40	32.77	352
247	Kays Financial Advisory Corporation	Atlanta, Ga.	169.95	19.21	0.50	12.24	336
248	Matrix Wealth Advisors	Charlotte, N.C.	169.17	23.45	1.11	23.45	205
249	Ramsey & Associates	Seattle, Wash.	168.67	20.11	2.03	15.77	92
250	John Moore & Associates	Albuquerque, N.M.	167.52	16.64	0.34	4.97	363
251	Hoxton Financial	Shepherdstown, W. Va.	166.99	31.08	0.77	17.85	282
252	Glenn Woody Financial Consultants	Costa Mesa, Calif.	166.65	8.77	0.56	9.86	317
253	Petra Financial Advisors	Colorado Springs, Colo.	165.00	11.49	0.93	14.01	244
254	Asset Management Advisors	Houston, Tex.	164.89	21.45	2.75	5.25	63
255	Vintage Financial Services	Ann Arbor, Mich.	164.61	21.94	0.72	17.68	292
256	Catalyst Financial Planning & Invest. Mgmt. Corp.	Oakland, Calif.	162.98	3.81	2.55	2.19	66
257	Retirement Asset Management	Bellevue, Wash.	162.33	10.93	0.46	-4.91	343
258	Hallett & Associates	Port Angeles, Wash.	162.00	83.52	0.39	80.90	355
259	Wheeler Frost Associates	San Diego, Calif.	162.00	13.29	1.35	11.40	166
260	BondStreet Wealth Management	Everett, Wash.	161.00	40.00	0.46	0.00	345
261	Mutual Fund Management Co.	Troy, Mich.	160.28	6.48	0.63	0.24	303
262	Schultz Financial Group	Reno, Nev.	159.52	3.23	1.64	13.87	125
263	WNA Wealth Advisors	Hinsdale, Ill.	158.88	19.81	1.05	5.53	218
264	TABR Capital Management	Orange, Calif.	158.14	5.57	0.64	-0.01	300
265	TriCapital Advisors	N. Bethesda, Md.	157.77	-0.28	1.05	-20.22	219
266	Garnet Group	Bethesda, Md.	157.00	26.61	1.65	27.95	124
267	Allodium Investment Consultants	Minneapolis, Minn.	156.86	9.91	1.89	9.91	108
268	Harbor Financial Services	Mobile, Ala.	155.10	62.15	0.21	-3.11	376
269	Liebau Asset Management	Pasadena, Calif.	154.96	28.26	2.42	-43.89	72
270	Tarpley & Underwood Financial Advisors	Atlanta, Ga.	154.82	39.69	1.60	10.88	129
271	Sather Financial Group	Victoria, Texas	154.22	13.26	0.82	16.29	269
272	Kabarec Financial Advisors	Palatine, Ill.	153.43	17.99	0.83	11.61	268
273	FAC Wealth Management	Naples, Fla.	152.45	27.81	1.17	49.44	195
274	Nixon Peabody Financial Advisors	Rochester, N.Y.	152.26	151.22	1.27	71.67	179
275	Absolute Capital Management	Pittsburgh, Pa.	152.00	20.63	0.15	38.73	381
276	Madison Wealth Management	Cincinnati, Ohio	151.45	15.92	1.46	4.78	146
277	Financial Principles	Fairfield, N.J.	151.00	20.80	0.30	8.72	367
278	Pickler Wealth Advisors	Collierville, Tenn.	150.01	20.00	0.53	6.05	326
279	Jacob Gold & Associates	Scottsdale, Ariz.	150.00	50.00	0.75	5.00	285
280	Private Capital Management	Larkspur, Calif.	150.00	15.38	2.50	5.77	69
281	RB Capital Management	Incline Village, Nev.	150.00	7.14	0.50	-10.71	335
282	Bedrock Capital Management	Los Altos, Calif.	149.19	31.68	0.90	25.30	251
283	Asset Management Group	Stamford, Conn.	148.31	15.92	0.75	-2.91	284
284	Wechter Financial Services	Parsippany, N.J.	145.01	12.51	1.13	9.88	202
285	Financial Management Group	Cincinnati, Ohio	144.70	10.88	1.00	-0.59	233
286	Bowyer Weydert Wealth Planning Partners	Park Ridge, Ill.	143.55	14.97	1.75	19.18	114
287	Tobias Financial Advisors	Plantation, Fla.	142.58	17.43	1.45	11.44	147
288	Beverly Investment Advisors	Beverly Hills, Calif.	141.00	41.00	1.26	-3.06	184
289	Hurley Financial Group	Corvallis, Ore.	136.50	15.65	0.32	2.26	364
290	Burns Matteson Capital Management	Corning, N.Y.	136.38	23.44	1.11	8.39	207

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291	Sensible Financial Planning and Management	Cambridge, Mass.	135.00	-27.03	1.06	-42.54	217
292	Kuntz Leshner Capital	Lancaster, Pa.	133.29	24.00	0.51	17.83	331
293	Horizon Advisors	Houston, Tex.	132.47	14.33	1.87	-11.44	109
294	WJ Interests	Sugar Land, Tex.	132.30	15.34	1.15	6.32	198
295	Kahler Financial Group	Rapid City, S.D.	132.09	12.27	2.00	-4.74	94
296	Stevens Portfolio Design	Deerfield, Ill.	131.23	25.26	1.51	5.10	138
297	Asset Planning Corporation	Knoxville, Tenn.	130.84	9.39	1.01	7.69	229
298	Callan Capital	La Jolla, Calif.	130.00	+	2.95	+	59
299	Hardy Reed Frugé Capital Advisors	Tupelo, Miss.	127.83	19.51	0.88	-13.46	256
300	Mark Sheptoff Financial Planning	Glastonbury, Conn.	126.00	16.67	0.93	-1.48	243
301	Legacy Consulting Group	Plano, Tex.	125.03	11.38	1.33	7.82	169
302	Hopwood Financial Services	Great Falls, Va.	125.02	23.62	1.28	5.96	176
303	The Retirement Planning Group	Overland Park, Kan.	125.01	19.50	0.53	1.70	323
304	Summit Wealth Group	Colorado Springs, Colo.	125.00	7.76	0.25	-28.88	374
305	Classic Capital	Short Hills, N.J.	124.50	20.11	1.48	1.52	143
306	Houlihan Financial Resource Group	Reston, Va.	124.16	6.54	1.97	-1.91	97
307	Kraft Asset Management	Nashville, Tenn.	122.95	19.24	1.43	-4.33	153
308	Netting & Pace	San Antonio, Tex.	122.23	7.74	2.22	-2.05	83
309	Miller Advisors	Kirkland, Wash.	122.00	10.91	0.55	18.47	318
310	Focus Financial Advisors	Rockford, Ill.	120.90	11.79	0.98	2.71	234
311	Keller & Associates	Victoria, Tex.	120.29	8.51	0.77	7.12	281
312	Morris Financial Concepts	Mt. Pleasant, S.C.	116.51	14.43	0.57	-0.23	313
313	RMR Financial Advisors	Madison, Wis.	116.19	9.39	0.58	3.97	312
314	Roof Advisory Group	Harrisburg, Pa.	114.30	37.11	1.41	21.87	154
315	Ritter Daniher Financial Advisory	Cincinnati, Ohio	113.34	24.90	0.94	6.16	241
316	Kemp Financial Management	Fullerton, Calif.	113.01	26.96	0.79	2.10	278
317	Searcy Financial Services	Overland Park, Kan.	112.50	10.62	0.82	7.39	270
318	Holbrook Global Strategies	Palo Alto, Calif.	112.40	14.46	3.51	3.73	45
319	The Darrow Company	Concord, Mass.	112.06	32.07	1.14	15.90	199
320	Dean Consulting & Associates	San Diego, Calif.	111.44	6.51	1.49	6.51	142
321	Paradigm Financial Advisors	Des Peres, Mo.	110.87	17.97	1.09	2.94	212
322	Access Financial Resources	Oklahoma City, Okla.	110.10	0.00	0.58	-20.63	311
323	Polaris Equity Management	San Francisco, Calif.	110.00	15.79	0.55	44.74	319
324	Sentinel Wealth Management	Reston, Va.	109.10	6.74	1.54	0.72	132
325	Anderson Riley & Spoor	St. Petersburg, Fla.	108.00	44.00	0.83	21.85	267
326	Focus Wealth Management	Middleburg, Va.	108.00	8.07	1.35	-5.44	165
327	Family Financial Architects	Natick, Mass.	107.29	9.46	0.78	3.91	280
328	D B & B Financial Services	Syracuse, N.Y.	107.19	4.96	0.46	4.51	342
329	Kummer Financial Strategies	Highlands Ranch, Colo.	107.00	27.38	0.31	0.09	366
330	Tortoise Investment Management	White Plains, N.Y.	106.97	42.37	1.39	10.93	158
331	Macke Financial Advisory Group	Fort Myers, Fla.	106.88	24.04	0.80	20.34	273
332	RPH Financial Services	Sciota, Pa.	105.25	15.46	0.59	17.41	310
333	Sutterfield Financial Group	Bartlesville, Okla.	104.52	44.90	0.16	11.46	380
334	J W Coons Advisors	Columbus, Ohio	104.04	127.72	2.89	32.84	60
335	Brown Financial Advisory	Fairhope, Ala.	103.75	9.26	0.66	14.79	297
336	Slayton Lewis	Salt Lake City, Utah	103.67	23.06	1.96	11.45	100
337	Rochester Financial Services	Pittsford, N.Y.	102.47	11.10	0.44	6.35	347
338	Welz Financial Services	Stockton, Calif.	102.14	3.68	0.87	-6.87	257
339	Wealth Health	Roseland, N.J.	102.00	85.45	1.46	-20.52	145
340	Mendel Money Management	Northbrook, Ill.	102.00	24.39	0.85	19.21	262

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341	Starmont Asset Management	San Ramon, Calif.	100.82	11.93	1.34	-31.35	167
342	Financial Management Concepts	Winter Springs, Fla.	100.47	19.78	0.80	20.73	274
343	Edge Portfolio Management	Winfield, Ill.	100.00	81.82	3.23	5.57	51
344	Milwaukee Private Wealth Management	Mequon, Wis.	100.00	+	1.67	+	228
<b>ASSET CATEGORY: \$75 MILLION TO &lt;\$100 MILLION</b>							
345	Trust Advisory Group	Reading, Mass.	99.40	3.54	0.27	9.63	371
346	AVL WealthCare	Gulfport, Miss.	97.90	12.82	1.04	4.42	223
347	JVL Associates	Wyoming, Mich.	97.30	22.54	6.08	14.89	27
348	Helm Investment Management	Denver, Colo.	96.71	10.24	1.90	5.91	105
349	Berno Financial Management	Cincinnati, Ohio	96.13	14.23	1.37	4.44	163
350	Caton Financial	Larkspur, Calif.	95.73	21.63	0.61	10.72	304
351	Dorman Financial Management	Maitland, Fla.	95.00	25.00	0.94	5.20	242
352	Financial Insights	Tacoma, Wash.	94.92	1.92	0.48	30.75	339
353	Colman Knight Advisory Group	Carlisle, Mass.	93.36	15.65	1.73	15.65	117
354	Optimal Wealth & Investments	Naperville, Ill.	92.72	16.50	0.53	6.52	324
355	Townsend Asset Management Corp.	Raleigh, N.C.	90.00	11.11	0.60	11.11	308
356	Future Finances	Columbus, Ohio	90.00	3.45	0.60	-2.76	307
357	MJB Asset Management	New York, N.Y.	89.88	6.07	0.98	-14.68	237
358	Century Wealth Management	Memphis, Tenn.	88.76	140.71	6.83	66.65	24
359	F.I.G. Financial Advisory Services	Edmond, Okla.	88.56	23.96	0.39	12.64	356
360	Heritage Way Advisors	Rockford, Ill.	87.40	19.65	3.36	10.45	48
361	Appleton Group Wealth Management	Appleton, Wis.	87.00	7.94	0.91	-10.05	250
362	Perspective Financial Services	Phoenix, Ariz.	86.20	54.38	0.47	-7.71	340
363	Wymer Brownlee Tax and Financial Management	Enid, Okla.	85.90	41.98	0.18	17.52	379
364	21st Century Wealth Management	York, Pa.	85.07	17.07	1.89	9.26	107
365	Financial Guidance Group	Palm Harbor, Fla.	85.00	10.39	0.74	5.59	288
366	Triton Wealth Management	Annapolis, Md.	84.30	35.97	0.39	-3.33	354
367	Allen Capital Group	Grand Island, Neb.	82.51	31.22	0.22	5.12	375
368	The Oxford Private Client Group	Minneapolis, Minn.	81.64	10.50	0.38	-60.10	357
369	Vermillion Financial Advisors	South Barrington, Ill.	81.00	376.47	0.53	417.22	322
370	Wealth Planners	Baton Rouge, La.	80.04	20.41	0.13	25.92	383
371	McKeelGesek Financial Advisory Services	Coppell, Tex.	80.00	19.40	1.14	-14.71	200
372	Whitcomb & Hess	Ashland, Ohio	79.56	11.38	0.10	-18.99	384
373	American Financial & Tax Strategies	New York, N.Y.	79.18	9.27	0.68	2.73	295
374	TEAM Financial Services	Harrisburg, Pa.	78.90	11.11	0.39	-0.50	353
375	Focus Capital Wealth Management	Bedford, N.H.	78.82	11.14	0.37	7.47	358
376	YellowWood Financial Advisors	Bethesda, Md.	78.19	4.05	1.66	-11.45	123
377	Salem Partners Wealth Management	Los Angeles, Calif.	78.07	27.99	9.76	-4.01	18
378	Professional Financial Strategies	Pittsford, N.Y.	77.82	5.94	1.05	15.96	220
379	Family Wealth Advisory Group	Cincinnati, Ohio	77.78	26.31	0.64	-8.89	301
380	Rainsberger Wealth Advisors	Colorado Springs, Colo.	77.70	19.82	0.82	4.68	271
381	Harbor Financial Group	Boulder, Colo.	77.59	18.64	0.89	14.55	254
382	Asset Planning	Los Alamitos, Calif.	77.29	19.30	0.48	-3.07	337
383	Tull Financial Group	Chesapeake, Va.	76.21	11.47	0.71	4.24	293
384	Inverness Financial Group	Birmingham, Ala.	76.01	-22.44	0.52	-16.55	327

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