

FA'S 2009 INDEPENDENT RIA RANKING

SPONSORED BY



FA's 2009 RIA Ranking (By Total Assets)

| 2008 TOTAL ASSETS RANK* | FIRM NAME | LOCATION | YEAR END 2008 ASSETS (\$MM) | % GROWTH IN ASSETS 2007-2008 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|---|----------------------------------|--------------------------|--------------------------------------|---------------------------------------|-------------------------------------|--|-------------------------------------|
| ASSET CATEGORY: \$1 BILLION AND OVER | | | | | | | |
| 1 | GenSpring Family Offices | Palm Beach Gardens, Fla. | 15,550.49 | 18.41 | 20.01 | -12.07 | 34.66 |
| 2 | Moneta Group Investment Advisors | Clayton, Mo. | 6,535.15 | -17.56 | 3.08 | -17.02 | -0.65 |
| 3 | Plante Moran Financial Advisors | Southfield, Mich. | 5,343.49 | -0.40 | 2.77 | -31.22 | 44.82 |
| 4 | Convergent Wealth Advisors | Rockville, Md. | 5,253.55 | -10.34 | 13.61 | -43.32 | 58.20 |
| 5 | Ronald Blue & Co. | Atlanta, Ga. | 4,244.18 | -21.70 | 0.57 | -29.00 | 10.29 |
| 6 | myCIO Wealth Partners | Philadelphia, Pa. | 3,821.00 | -15.29 | 11.08 | -27.81 | 17.35 |
| 7 | Beacon Pointe Advisors | Newport Beach, Calif. | 3,641.70 | -15.79 | 11.00 | -36.90 | 33.47 |
| 8 | Aspiriant | San Francisco, Calif. | 3,607.05 | -28.91 | 9.27 | -35.67 | 10.51 |
| 9 | RSM McGladrey | Minneapolis, Minn. | 3,352.96 | 3.86 | 0.99 | -5.64 | 10.07 |
| 10 | The Mutual Fund Store | Overland Park, Kan. | 3,347.28 | -17.93 | 0.13 | -35.96 | 28.16 |
| 11 | Presidio Wealth Management | San Francisco, Calif. | 3,319.16 | -12.96 | 23.71 | -7.36 | -6.04 |
| 12 | Clarfled Financial Advisors | Tarrytown, N.Y. | 3,110.29 | 9.89 | 12.44 | 5.49 | 4.17 |
| 13 | BBR Partners | New York, N.Y. | 3,097.21 | -14.23 | 49.16 | -21.04 | 8.62 |
| 14 | Edelman Financial Services | Fairfax, Va. | 2,900.00 | -23.68 | 0.29 | -37.04 | 21.21 |
| 15 | Ballentine, Finn & Company | Waltham, Mass. | 2,530.00 ¹ | 29.41 ¹ | 22.19 | 24.87 | 3.64 |
| 16 | GW & Wade | Wellesley, Mass. | 2,371.00 | -13.15 | 1.34 | -18.87 | 7.05 |

Source: Discovery Database.

*Discretionary and nondiscretionary assets under management reported on Form ADV. ¹ In 2008 based on a re-reading of SEC definitions, Ballantine, Finn recategorized \$1.2 billion as nondiscretionary assets that were previously recorded as other assets not measured by this survey. Without the change, the firm's total AUM in this ranking would have dropped.

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|--|-------------------------------------|------------------------|-----------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 17 | Altair Advisers | Chicago, Ill. | 2,087.51 | -24.91 | 10.39 | -30.51 | 8.06 |
| 18 | Symmetry Partners | Glastonbury, Conn. | 2,078.84 | -31.09 | 0.13 | -60.16 | 72.97 |
| 19 | R.M. Davis | Portland, Me. | 1,793.03 | -23.19 | 1.30 | -25.36 | 2.91 |
| 20 | Hewins Financial Advisors | San Mateo, Calif. | 1,744.00 | -21.58 | 3.37 | -37.33 | 25.12 |
| 21 | Bingham, Osborn & Scarborough | San Francisco, Calif. | 1,677.60 | -19.83 | 2.24 | -21.32 | 1.90 |
| 22 | Buckingham Asset Management | St. Louis, Mo. | 1,403.15 | -16.45 | 1.04 | -21.10 | 5.90 |
| 23 | South Texas Money Management | San Antonio, Texas | 1,401.61 | -16.26 | 0.98 | -25.44 | 12.31 |
| 24 | Joel Isaacson & Co. | New York, N.Y. | 1,355.49 | -16.59 | 1.94 | -21.35 | 6.06 |
| 25 | Mariner Wealth Advisors | Leawood, Kan. | 1,332.00 | 19.46 | 4.04 | -2.26 | 22.22 |
| 26 | Badgley, Phelps and Bell | Seattle, Wash. | 1,320.79 | -20.53 | 3.29 | -27.26 | 9.24 |
| 27 | Robertson Grieg & Thoele | Dallas, Texas | 1,291.70 | 12.32 | 5.15 | 6.06 | 5.91 |
| 28 | Telemus Capital Partners | Southfield, Mich. | 1,215.65 | -30.05 | 1.17 | -39.46 | 15.54 |
| 29 | United Capital Financial Advisers | Newport Beach, Calif. | 1,214.89 | 33.11 | 0.27 | -25.47 | 78.61 |
| 30 | Silver Bridge | Boston, Mass. | 1,201.54 | -20.64 | 2.99 | -19.85 | -0.99 |
| 31 | Savant Capital Management | Rockford, Ill. | 1,192.89 | -21.28 | 0.63 | -26.91 | 7.70 |
| 32 | Heck Capital Advisors | Rhinelander, Wis. | 1,190.53 | 16.15 | 2.38 | 10.34 | 5.26 |
| 33 | Wescott Financial Advisory Group | Philadelphia, Pa. | 1,180.00 | -22.62 | 4.45 | -28.75 | 8.61 |
| 34 | Balasa Dinverno Foltz | Itasca, Ill. | 1,178.66 | -20.80 | 1.59 | -22.83 | 2.63 |
| 35 | RMB Capital Management | Chicago, Ill. | 1,140.65 | -19.79 | 1.14 | -24.74 | 6.58 |
| 36 | MAI Wealth Advisors | Cleveland, Ohio | 1,125.08 | -12.38 | 1.13 | -12.38 | 0.00 |
| 37 | Massey Quick & Co. | Morristown, N.J. | 1,111.72 | -0.52 | 14.82 | -21.75 | 27.12 |
| 38 | Brighton Jones | Seattle, Wash. | 1,109.00 | -26.26 | 2.70 | -39.57 | 22.02 |
| 39 | Plancorp | St. Louis, Mo. | 1,099.52 | -25.22 | 2.88 | -32.66 | 11.05 |
| 40 | Dowling & Yahnke | San Diego, Calif. | 1,099.50 | -17.43 | 1.59 | -21.13 | 4.69 |
| 41 | Ameritas Investment Corp. | Lincoln, NE | 1,067.16 | -16.16 | 0.11 | -23.88 | 10.13 |
| 42 | Molewski Financial Solutions | Bethlehem, Pa. | 1,066.20 | -13.09 | 5.50 | -17.12 | 4.86 |
| 43 | Kovitz Investment Group | Chicago, Ill. | 1,062.00 | -3.23 | 1.42 | -12.26 | 10.29 |
| 44 | Budros, Ruhlin & Roe | Columbus, Ohio | 1,004.52 | -26.67 | 1.82 | -33.58 | 10.40 |
| ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION | | | | | | | |
| 45 | HBK Sorce Financial | Erie, Pa. | 990.84 | -2.53 | 0.27 | -4.94 | 2.53 |
| 46 | Financial Management Partners | Clayton, Mo. | 970.00 | 14.12 | 6.55 | 2.55 | 11.28 |
| 47 | Heritage Investors Management Corp. | Bethesda, Md. | 931.66 | -20.98 | 2.19 | -25.63 | 6.25 |
| 48 | Cary Street Partners | Richmond, Va. | 910.00 | -17.27 | 0.91 | -33.82 | 25.00 |
| 49 | RCL Advisors | New York, N.Y. | 881.72 | -15.62 | 9.28 | -26.28 | 14.46 |
| 50 | SignatureFD | Atlanta, Ga. | 876.29 | -12.48 | 2.40 | -19.92 | 9.28 |
| 51 | The Colony Group | Boston, Mass. | 858.73 | -25.69 | 1.18 | -22.41 | -4.22 |
| 52 | ThomasPartners | Wellesley Mass. | 831.03 | -10.26 | 1.04 | -32.69 | 33.33 |
| 53 | Creative Planning | Leawood, Kan. | 816.44 | 17.98 | 1.13 | -19.45 | 46.46 |
| 54 | Mintz Levin Financial Advisors | Boston, Mass. | 807.17 | -29.61 | 2.35 | -29.20 | -0.58 |
| 55 | JMG Financial Group | Oak Brook, Ill. | 806.24 | -27.91 | 1.45 | -28.82 | 1.27 |
| 56 | Lee Financial Corporation | Dallas, Texas | 791.58 | -20.48 | 1.87 | -15.40 | -6.00 |
| 57 | WMS Partners | Towson, Md. | 790.56 | -10.67 | 4.37 | -5.24 | -5.73 |
| 58 | Honkamp Krueger Financial Services | Dubuque, Iowa | 788.03 | -24.98 | 0.32 | -27.98 | 4.17 |
| 59 | Iron Financial | Northbrook, Ill. | 779.00 | -10.67 | 1.00 | -13.08 | 2.77 |
| 60 | Morton Capital Management | Calabasas, Calif. | 759.40 | -14.77 | 1.54 | -26.72 | 16.31 |
| 61 | Parsec Financial | Asheville, N.C. | 749.72 | -24.36 | 0.73 | -27.68 | 4.58 |
| 62 | Brouwer & Janachowski | Tiburon, Calif. | 745.12 | 8.00 | 2.38 | -22.71 | 39.73 |
| 63 | Sage Financial Group | West Conshohocken, Pa. | 725.53 | -21.56 | 1.42 | -26.18 | 6.25 |
| 64 | Cassaday & Company | McLean, Va. | 718.19 | -21.77 | 0.80 | -36.80 | 23.80 |

Source: Discover y Database. *Discretionary and nondiscretionary assets under management reported on Form ADV.
 **Average assets per client relationship. † Founded in 2007, not meaningful. ‡ Founded in 2008, not meaningful.
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FA's 2009 RIA Ranking (By Total Assets)

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|--|-------------------------------------|-----------------------|-----------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 65 | TrustCore Financial Services | Brentwood, Tenn. | 714.75 | -10.25 | 0.86 | -14.58 | 5.06 |
| 66 | Foster Group | West Des Moines, Iowa | 708.40 | -25.85 | 0.87 | -31.78 | 8.69 |
| 67 | Resource Consulting Group | Orlando, Fla. | 701.39 | -35.95 | 2.26 | -36.57 | 0.98 |
| 68 | Whitnell & Co. | Oak Brook, Ill. | 676.31 | -9.55 | 1.35 | -54.77 | 100.00 |
| 69 | Harold C. Brown & Co. | Buffalo, N.Y. | 667.02 | -25.32 | 0.65 | -23.09 | -2.91 |
| 70 | Stonebridge Capital Advisors | St. Paul, Minn. | 631.50 | -0.13 | 0.99 | -19.85 | 24.61 |
| 71 | The Karras Company | Roy, Utah | 619.70 | 14.13 | 4.08 | 6.62 | 7.04 |
| 72 | Carlson Capital Management | Northfield, Minn. | 618.65 | -31.36 | 1.28 | -23.15 | -0.68 |
| 73 | Pacific West Financial Consultants | Renton, Wash. | 603.86 | -3.69 | 0.13 | -14.39 | 12.50 |
| 74 | Olson Mobeck Investment Advisors | Wethersfield, Conn. | 597.26 | -22.97 | 0.65 | -23.81 | 1.10 |
| 75 | Portfolio Solutions | Troy, Mich. | 591.38 | -26.50 | 1.31 | -27.48 | 1.34 |
| 76 | Truepoint | Cincinnati, Ohio | 590.42 | -23.31 | 1.64 | -34.85 | 17.70 |
| 77 | WTAS | McLean, Va. | 580.85 | -49.67 | 5.59 | -51.12 | 2.97 |
| 78 | Osborne Partners Capital Management | San Francisco, Calif. | 580.37 | -28.61 | 1.66 | -38.81 | 16.67 |
| 79 | Quest Capital Management | Dallas, Texas | 575.93 | -6.32 | 1.78 | -8.92 | 2.86 |
| 80 | Patriot Wealth Management | Houston, Texas | 572.80 | -11.78 | 1.78 | -21.95 | 13.03 |
| 81 | Foster & Motley | Cincinnati, Ohio | 570.70 | -24.02 | 1.78 | -23.30 | -0.93 |
| 82 | JFS Wealth Advisors | Hermitage, Pa. | 566.44 | -32.28 | 0.79 | -34.72 | 3.75 |
| 83 | ProVise Management Group | Clearwater, Fla. | 564.00 | -24.09 | 1.03 | -24.79 | 0.92 |
| 84 | SYM Financial Advisors | Warsaw, Ind. | 558.12 | -26.63 | 1.00 | -27.68 | 1.45 |
| 85 | Hamilton Capital Management | Columbus, Ohio | 551.23 | -25.37 | 0.81 | -28.43 | 4.27 |
| 86 | The Harbor Group | Bedford, N.H. | 549.60 | -14.78 | 0.83 | -13.62 | -1.35 |
| 87 | Enright Premier Wealth Advisors | Torrance, Calif. | 545.00 | 4.81 | 0.94 | 2.10 | 2.65 |
| 88 | Brightworth | Atlanta, Ga. | 544.02 | -27.69 | 1.68 | -34.61 | 10.58 |
| 89 | Capital Performance Advisors | Walnut Creek, Calif. | 543.57 | -19.44 | 0.86 | -19.44 | 0.00 |
| 90 | PFG Financial Advisors Network | State College, Pa. | 543.20 | -21.10 | 0.33 | -24.21 | 4.10 |
| 91 | Strategic Wealth Partners | Deerfield, Ill. | 539.00 | † | 2.16 | † | † |
| 92 | Independent Financial Group | San Diego, Calif. | 532.34 | 26.20 | 0.15 | -17.22 | 52.45 |
| 93 | Pinnacle Advisory Group | Columbia, Md. | 531.09 | -4.08 | 0.94 | -15.98 | 14.17 |
| 94 | Legacy Wealth Management | Memphis, Tenn. | 531.01 | -7.39 | 1.10 | -19.47 | 15.00 |
| 95 | Charles D. Haines | Birmingham, Ala. | 508.37 | -3.28 | 1.01 | 2.27 | -5.43 |
| 96 | Dion Money Management | Williamstown, Mass. | 507.85 | -41.15 | 0.30 | -35.24 | -9.13 |
| 97 | StrategicPoint Investment Advisors | Providence, R.I. | 502.11 | -23.93 | 0.40 | -14.76 | -10.76 |
| 98 | Resnick Investment Advisors | Westport, Conn. | 500.00 | -13.64 | 0.60 | -18.06 | 5.40 |
| ASSET CATEGORY: \$300 MILLION TO < \$500 MILLION | | | | | | | |
| 99 | WESCAP Management Group | Burbank, Calif. | 488.21 | -26.49 | 1.51 | -30.12 | 5.19 |
| 100 | Diesslin & Associates | Fort Worth, Texas | 478.40 | -4.51 | 1.43 | -9.37 | 5.36 |
| 101 | Arbor Capital Management | Amherst, N.Y. | 476.77 | 6.14 | 1.34 | -8.73 | 16.29 |
| 102 | LLBH Private Wealth Management | Westport, Conn. | 475.00 | ‡ | 2.38 | ‡ | ‡ |
| 103 | Fairway Wealth Management | Independence, Ohio | 460.00 | -14.81 | 4.69 | -28.72 | 19.51 |
| 104 | Evensky & Katz | Coral Gables, Fla. | 460.00 | -16.67 | 1.88 | -21.77 | 6.52 |
| 105 | CFS Investment Advisory Services | Totowa, N.J. | 458.83 | -27.31 | 1.33 | -24.15 | -4.17 |
| 106 | Briaud Financial Advisors | Bryan, Texas | 448.97 | -2.35 | 1.84 | -3.95 | 1.67 |
| 107 | Abacus Planning Group | Columbia, S.C. | 446.23 | -14.94 | 2.75 | -20.19 | 6.58 |
| 108 | American Economic Planning Group | Watchung, N.J. | 441.50 | -32.24 | 1.06 | -30.14 | -3.02 |
| 109 | Meyer Capital Group | Marlton, N.J. | 434.99 | -25.22 | 0.62 | -30.56 | 7.69 |
| 110 | Lenox Wealth Management | Cincinnati, Ohio | 431.83 | -16.54 | 1.93 | -23.99 | 9.80 |
| 111 | Altfest Personal Wealth Management | New York, N.Y. | 418.80 | -21.84 | 1.13 | -24.37 | 3.34 |
| 112 | Sadoff Investment Management | Milwaukee, Wis. | 412.40 | 3.46 | 0.90 | -6.68 | 10.87 |

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|--|--------------------------------------|-----------------------|-----------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 113 | Cypress Wealth Advisors | San Francisco, Calif. | 409.57 | -47.56 | 11.07 | -53.23 | 12.12 |
| 114 | Waypoint Advisors | Norfolk, Va. | 408.95 | -21.78 | 4.81 | -35.58 | 21.43 |
| 115 | Jackson Thornton Asset Management | Montgomery, Ala. | 407.07 | -30.06 | 1.17 | -31.06 | 1.45 |
| 116 | Lau Associates | Wilmington, Del. | 400.00 | -33.33 | 3.10 | -33.33 | 0.00 |
| 117 | Redstone Advisors | Wichita, Kan. | 396.66 | 11.12 | 6.20 | -30.55 | 60.00 |
| 118 | IPI Asset Management | Decatur, Ill. | 396.04 | -7.56 | 0.38 | -27.81 | 28.05 |
| 119 | Weaver Tidwell Wealth Management | Dallas, Texas | 390.00 | 6.85 | 1.03 | -29.70 | 52.00 |
| 120 | Arthur M. Cohen & Associates | Northbrook, Ill. | 389.85 | -19.62 | § § | | |
| 121 | Summit Financial Strategies | Columbus, Ohio | 388.06 | -19.18 | 0.94 | -23.47 | 5.61 |
| 122 | HoyleCohen Wealth Management | San Diego, Calif. | 373.00 | -15.23 | 0.91 | -34.77 | 29.97 |
| 123 | Sigma Investment Counselors | Southfield, Mich. | 370.85 | -31.89 | 0.87 | -31.09 | -1.17 |
| 124 | WESPAC Advisors | Oakland, Calif. | 370.24 | -18.87 | 0.51 | -28.23 | 13.05 |
| 125 | Towneley Capital Management | Laguna Hills, Calif. | 367.34 | -16.70 | 2.89 | -14.08 | -3.05 |
| 126 | Heritage Financial Services | Norwood, Mass. | 365.87 | -7.41 | 0.56 | 11.11 | -16.67 |
| 127 | Modera Wealth Management | Old Tappan, N.J. | 364.75 | -16.16 | 1.59 | -26.74 | 14.43 |
| 128 | Eclectic Associates | Fullerton, Calif. | 352.28 | -3.49 | 0.81 | -3.04 | -0.46 |
| 129 | Founders Financial Network | Cupertino, Calif. | 349.72 | -27.53 | 4.32 | -29.32 | 2.53 |
| 130 | CPS Investment Advisors | Lakeland, Fla. | 341.94 | -19.02 | 0.40 | -22.79 | 4.88 |
| 131 | Salient-Friedman Wealth Management | San Rafael, Calif. | 341.84 | -24.70 | 1.54 | -20.30 | -5.53 |
| 132 | Strategic Financial Management Group | Dallas, Texas | 340.12 | -5.16 | 1.02 | -3.18 | -2.05 |
| 133 | Vista Capital Partners | Portland, Ore. | 327.85 | -15.06 | 1.30 | -17.41 | 2.85 |
| 134 | Kistler Tiffany Advisors | Berwyn, Pa. | 327.51 | ‡ | 0.73 | ‡ | ‡ |
| 135 | Pinnacle Wealth Planning Services | Mansfield, Ohio | 325.90 | -15.57 | 0.95 | -19.52 | 4.91 |
| 136 | Northwest Financial Group | Herndon, Va. | 319.00 | † | 0.12 | † | † |
| 137 | Delessert Financial Services | Waltham, Mass. | 307.62 | -24.60 | 2.59 | -29.04 | 6.25 |
| 138 | Sovereign Wealth Management | Memphis, Tenn. | 307.26 | -31.62 | 1.45 | -39.04 | 12.17 |
| 139 | Sharkey, Howes & Javer | Denver, Colo. | 306.88 | -24.83 | 0.32 | -25.53 | 0.94 |
| 140 | Phillips Financial Management | Fort Wayne, Ind. | 305.53 | -10.47 | 0.74 | -2.41 | -8.26 |
| 141 | Horan Capital Management | Baltimore, Md. | 304.35 | -36.64 | 0.32 | -62.56 | 69.23 |
| 142 | Legend Financial Advisors | Pittsburgh, Pa. | 301.54 | -6.92 | 1.16 | -11.95 | 5.71 |
| 143 | GM Advisory Group | Port Washington, N.Y. | 300.00 | 11.11 | 2.61 | -3.38 | 15.00 |
| 144 | Oxford Investment Partners | Phoenix, Ariz. | 300.00 | -11.76 | 2.50 | -26.47 | 20.00 |
| ASSET CATEGORY: \$100 MILLION TO < \$300 MILLION | | | | | | | |
| 145 | William Mack & Associates | Troy, Mich. | 299.15 | 66.00 | 0.93 | 64.97 | 0.63 |
| 146 | Cornerstone Capital Advisors | Uniontown, Ohio | 297.00 | -19.71 | 0.94 | -36.93 | 27.31 |
| 147 | Back Bay Financial Group | Boston, Mass. | 293.80 | -22.10 | 1.22 | -23.72 | 2.12 |
| 148 | JWA Financial Group | Dallas, Texas | 290.35 | -29.80 | 0.68 | -33.60 | 5.72 |
| 149 | Retirement Investment Advisors | Oklahoma City, Okla. | 285.22 | -37.31 | 0.56 | 5.72 | -40.70 |
| 150 | Spero-Smith Investment Advisers | Cleveland, Ohio | 281.16 | -27.17 | 1.00 | -30.28 | 4.46 |
| 151 | Burt Associates | Rockville, Md. | 279.98 | -21.85 | 1.46 | -24.70 | 3.78 |
| 152 | Mosaic Financial Partners | San Francisco, Calif. | 279.39 | -27.39 | 1.28 | -28.72 | 1.87 |
| 153 | Sequoia Financial Advisors | Akron, Ohio | 279.10 | -3.60 | 0.45 | -2.83 | -0.79 |
| 154 | MACRO Consulting Group | Parsippany, N.J. | 275.00 | -15.38 | 0.58 | -10.53 | -5.42 |
| 155 | Westport Resources | Westport, Conn. | 272.82 | -27.64 | 0.94 | -21.38 | -7.96 |
| 156 | MLR Wealth Management | Austin, Texas | 271.69 | -14.24 | 1.95 | -19.79 | 6.92 |
| 157 | Petersen Hastings | Kennewick, Wash. | 268.48 | -29.65 | 0.76 | -17.82 | -14.39 |
| 158 | CJM Wealth Advisers | Fairfax, Va. | 266.02 | -26.90 | 0.57 | -28.46 | 2.18 |
| 159 | Park Piedmont Advisors | New York, N.Y. | 263.60 | -16.89 | 0.88 | -20.51 | 4.56 |
| 160 | Smith Anglin Financial | Dallas, Texas | 254.00 | -21.02 | 0.70 | -26.68 | 7.72 |

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| 161 | Greystone Financial Group | Troy, Mich. | 249.00 | -23.65 | 0.78 | -21.50 | -2.74 |
| 162 | BHCO Capital Management | Dallas, Texas | 248.54 | -11.90 | 1.34 | -21.84 | 12.73 |
| 163 | Jackson Financial Management | Costa Mesa, Calif. | 247.10 | -20.30 | 0.75 | -29.74 | 13.45 |
| 164 | The Family Firm | Bethesda, Md. | 242.53 | -18.57 | 1.64 | -27.37 | 12.12 |
| 165 | HighTower Advisors | Chicago, Ill. | 237.65 | ‡ | 0.64 | ‡ | ‡ |
| 166 | McKinley Carter Wealth Services | Wheeling, W. Va. | 229.79 | -22.08 | 0.46 | -53.25 | 66.67 |
| 167 | Elliott Davis Investment Advisors | Greenville, S.C. | 226.78 | -21.97 | 0.45 | -25.06 | 4.12 |
| 168 | Stevens First Principles | Newport Beach, Calif. | 223.93 | 12.21 | 1.79 | -16.52 | 34.41 |
| 169 | Rodgers & Associates | Lancaster, Pa. | 221.64 | -25.01 | 0.54 | -28.67 | 5.13 |
| 170 | Weatherly Asset Management | Del Mar, Calif. | 219.85 | -0.77 | 1.07 | -14.74 | 16.38 |
| 171 | Capelli Financial Services | Bloomfield Hills, Mich. | 218.52 | -24.38 | 1.32 | -26.21 | 2.47 |
| 172 | Yeske Buie | San Francisco, Calif. | 217.70 | -27.55 | 1.23 | -30.42 | 4.12 |
| 173 | Old North Advisors | Boston, Mass. | 217.38 | -34.07 | 2.17 | -34.07 | 0.00 |
| 174 | Wade Financial Group | Minneapolis, Minn. | 215.00 | -15.69 | 1.17 | -21.64 | 7.60 |
| 175 | Kovack Advisors | Fort Lauderdale, Fla. | 212.84 | 0.83 | 0.25 | -27.52 | 39.11 |
| 176 | Financial Advantage | Columbia, Md. | 210.00 | -3.67 | 1.17 | -9.02 | 5.88 |
| 177 | HJ Wealth Management | Plymouth Meeting, Pa. | 208.20 | 5.00 | 0.83 | -16.00 | 25.00 |
| 178 | Lodestar Private Asset Management | Alamo, Calif. | 205.77 | -29.83 | 1.55 | -27.19 | -3.62 |
| 179 | The L. Warner Companies | Timonium, Md. | 202.63 | -29.75 | 1.18 | -33.84 | 6.17 |
| 180 | West Oak Capital | Westlake Village, Calif. | 202.11 | -15.88 | 2.69 | -15.88 | 0.00 |
| 181 | Fox, Joss & Yankee | Reston, Va. | 200.69 | -19.12 | 0.93 | -21.00 | 2.38 |
| 182 | Richard P. Slaughter Associates | Austin, Texas | 200.00 | 27.39 | 0.57 | 29.21 | -1.41 |
| 183 | Schneider Downs Wealth Management Advisors | Pittsburgh, Pa. | 199.78 | -20.32 | 1.02 | -28.04 | 10.73 |
| 184 | Oak Financial Group | Stamford, Conn. | 198.37 | -8.32 | 0.88 | -12.39 | 4.65 |
| 185 | ACG Advisory Services | Midlothian, Va. | 191.08 | -23.29 | 0.73 | -29.49 | 8.79 |
| 186 | Douglass Winthrop Advisors | New York, N.Y. | 190.83 | -20.81 | 0.66 | -24.66 | 5.11 |
| 187 | Johnson, Bender & Company | Houston, Texas | 189.70 | -23.82 | 0.63 | -27.62 | 5.26 |
| 188 | Educators Financial Services | Cambridge, Minn. | 186.12 | -12.67 | 0.03 | -54.90 | 93.66 |
| 189 | Schiavi & Dattani | Wilmington, Del. | 186.00 | -15.49 | 1.58 | -21.22 | 7.27 |
| 190 | The Planning Center | Moline, Ill. | 186.00 | 34.01 | 1.27 | 70.72 | -21.51 |
| 191 | CRA Financial | Northfield, N.J. | 184.62 | -12.61 | 0.68 | -14.85 | 2.63 |
| 192 | Ferrell Wealth Management | Winter Park, Fla. | 180.00 | -24.87 | 0.96 | -29.67 | 6.82 |
| 193 | New Century Financial Group | Princeton, N.J. | 178.22 | -0.31 | 0.34 | -22.57 | 28.75 |
| 194 | TGS Financial Advisors | Radnor, Pa. | 176.70 | -26.81 | 0.66 | -26.26 | -0.75 |
| 195 | White Oaks Wealth Advisors | Minneapolis, Minn. | 176.06 | -34.84 | 0.74 | -36.21 | 2.14 |
| 196 | Prosper Advisors | Armonk, N.Y. | 175.22 | 0.68 | 2.06 | -11.16 | 13.33 |
| 197 | North Berkeley Investment Partners | Berkeley, Calif. | 174.27 | -28.15 | 0.85 | -31.67 | 5.15 |
| 198 | Mark J. Snyder Financial Services | Medford, N.Y. | 172.00 | -15.52 | 0.41 | -18.34 | 3.45 |
| 199 | Schroeder, Braxton & Vogt | Amherst, N.Y. | 168.73 | -23.81 | 0.39 | -25.55 | 2.34 |
| 200 | The Arkansas Financial Group | Little Rock, Ark. | 168.43 | -15.24 | 0.86 | -21.76 | 8.33 |
| 201 | SilverOak Wealth Management | Minneapolis, Minn. | 168.10 | -12.06 | 0.90 | -22.40 | 13.33 |
| 202 | WealthQuest Financial Services | Norfolk, Va. | 167.12 | -27.60 | 0.87 | -29.87 | 3.23 |
| 203 | Stonegate Wealth Management | Fair Lawn, N.J. | 167.00 | -0.18 | 0.80 | -7.31 | 7.69 |
| 204 | Traphagen Investment Advisors | Oradell, N.J. | 166.92 | -16.61 | 0.22 | -20.64 | 5.07 |
| 205 | Investors Capital Management | Menlo Park, Calif. | 165.92 | -30.24 | 0.47 | -28.84 | -1.96 |
| 206 | Rowling, Dold & Associates | San Diego, Calif. | 165.00 | -20.29 | 0.97 | -22.63 | 3.03 |
| 207 | Sheaff Brock Investment Advisors | Indianapolis, Ind. | 165.00 | -38.20 | 0.35 | -41.89 | 6.35 |
| 208 | Smith & Howard Wealth Management | Atlanta, Ga. | 164.48 | -25.99 | 1.11 | -27.99 | 2.78 |
| 209 | KHC Wealth Management Services | Overland Park, Kan. | 161.70 | -25.14 | 0.98 | -29.67 | 6.45 |

Source: Discover y Database. *Discretionary and nondiscretionary assets under management reported on Form ADV.
 **Average assets per client relationship. † Founded in 2007, not meaningful. ‡ Founded in 2008, not meaningful.
 § Exact number not provided.

FA's 2009 RIA Ranking (By Total Assets)

| 2008 TOTAL ASSETS RANK* | FIRM NAME | LOCATION | YEAR END 2008 ASSETS (\$MM) | % GROWTH IN ASSETS 2007-2008 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|-------------------------|--|-------------------------|-----------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 210 | Heritage Wealth Management | San Diego, Calif. | 161.00 | -19.90 | 0.64 | -23.10 | 4.17 |
| 211 | Herbein Wealth Management | Wyomissing, Pa. | 160.62 | -13.15 | 0.99 | -16.90 | 4.52 |
| 212 | Center for Financial Planning | Southfield, Mich. | 159.71 | 0.00 | 0.18 | -4.13 | 4.31 |
| 213 | Tilson Financial Group | Watchung, N.J. | 156.26 | -20.81 | 0.52 | -16.06 | -5.66 |
| 214 | FAC Wealth Management | Naples, Fla. | 153.59 | 17.16 | 0.51 | -17.14 | 41.40 |
| 215 | DCA Global Investment Management | Norcross, Ga. | 150.95 | -18.39 | 1.59 | -31.28 | 18.75 |
| 216 | Sycamore Financial Group | Kokomo, Ind. | 149.80 | -16.78 | 0.12 | -27.18 | 14.29 |
| 217 | Capital Planning Advisory Group | Yardley, Pa. | 149.52 | -18.02 | 0.52 | -23.13 | 6.64 |
| 218 | McCarthy Grittinger Weil Financial Group | Milwaukee, Wis. | 149.44 | -24.33 | 0.58 | -28.13 | 5.28 |
| 219 | Ritter Daniher Financial Advisory | Cincinnati, Ohio | 148.35 | 30.89 | 1.11 | 17.22 | 11.67 |
| 220 | Moisand Fitzgerald Tamayo | Maitland, Fla. | 148.26 | -18.86 | 0.55 | -21.26 | 3.04 |
| 221 | Bridgewater Wealth Management | Bethesda, Md. | 147.44 | -18.09 | 1.30 | -31.14 | 18.95 |
| 222 | Asset Strategies | Casper, Wyo. | 147.10 | -23.18 | 0.70 | -28.33 | 7.18 |
| 223 | Financial Planning & Information Services | De Pere, Wis. | 144.25 | -18.80 | 0.29 | -27.07 | 11.34 |
| 224 | Smedley Financial Services | Salt Lake City, Utah | 143.34 | -32.93 | 0.14 | -29.74 | -4.55 |
| 225 | Retirement Strategies | Jacksonville, Fla. | 141.42 | 19.97 | 0.76 | 11.59 | 7.51 |
| 226 | Wechter Financial Services | Parsippany, N.J. | 140.54 | -3.08 | 1.06 | -6.02 | 3.13 |
| 227 | Sensible Financial Planning and Management | Cambridge, Mass. | 140.50 | -9.78 | 0.90 | -27.71 | 24.80 |
| 228 | Clientfirst Wealth Management | Little Rock, Ark. | 140.00 | 64.71 | 3.50 | 2.94 | 60.00 |
| 229 | Geier Asset Management | Marriottsville, Md. | 139.06 | -26.83 | 0.78 | -38.68 | 19.33 |
| 230 | Financial Management Group | Cincinnati, Ohio | 137.61 | -14.87 | 0.82 | -20.47 | 7.05 |
| 231 | Fernwood Investment Management | Quincy, Mass. | 136.68 | -10.61 | 1.18 | -25.25 | 19.59 |
| 232 | RB Capital Management | Fresno, Calif. | 135.93 | -10.27 | 0.49 | -19.88 | 12.00 |
| 233 | Ward & Associates | Rancho Santa Fe, Calif. | 134.92 | -31.14 | 2.59 | -33.79 | 4.00 |
| 234 | Winch Advisory Services | Appleton, Wis. | 134.90 | -25.22 | 0.42 | -37.72 | 20.07 |
| 235 | Sanders Financial Management | Norcross, Ga. | 132.67 | -17.59 | 0.78 | -27.77 | 14.09 |
| 236 | Copeland Wealth Management | Redlands, Calif. | 131.63 | -25.42 | 0.59 | -28.74 | 4.65 |
| 237 | LifePlan Financial Group | Miamisburg, Ohio | 131.45 | -27.70 | 0.31 | -42.23 | 25.15 |
| 238 | Lewis Financial Management | Raleigh, N.C. | 131.43 | -27.96 | 1.21 | -30.61 | 3.81 |
| 239 | Results One Financial | Elmhurst, Ill. | 129.59 | -33.31 | 0.33 | -39.14 | 9.58 |
| 240 | TABR Capital Management | Orange, Calif. | 128.83 | -18.53 | 0.52 | -19.84 | 1.63 |
| 241 | Roof Advisory Group | Harrisburg, Pa. | 128.00 | 11.98 | 1.33 | -5.51 | 18.52 |
| 242 | Hardy Reed Capital Advisors | Tupelo, Miss. | 127.83 | 9.95 | 0.86 | 4.75 | 4.96 |
| 243 | Crescent Sterling | Metairie, La. | 127.56 | -9.33 | 0.71 | -21.42 | 15.38 |
| 244 | Stevens Wealth Management | Deerfield, Ill. | 127.40 | -2.91 | 1.36 | -10.14 | 8.05 |
| 245 | Sather Financial Group | Victoria, Texas | 126.09 | -18.24 | 0.88 | 6.74 | -23.40 |
| 246 | Pickler Wealth Advisors | Collierville, Tenn. | 125.65 | -16.24 | 0.42 | -15.68 | -0.66 |
| 247 | Garnet Group | Boston, Mass. | 125.61 | -20.03 | 1.29 | -21.68 | 2.11 |
| 248 | BondStreet Wealth Management | Everett, Wash. | 125.00 | -22.36 | 0.28 | -39.61 | 28.57 |
| 249 | Planned Solutions | Sacramento, Calif. | 123.86 | -34.24 | 0.33 | -33.37 | -1.30 |
| 250 | Investors Asset Management | Plano, Texas | 123.29 | -16.80 | 0.66 | -19.48 | 3.33 |
| 251 | Jentner Financial Group | Akron, Ohio | 123.18 | -33.79 | 0.98 | -34.32 | 0.80 |
| 252 | Callan Capital | La Jolla, Calif. | 123.00 | -3.15 | 2.12 | -14.84 | 13.73 |
| 253 | c5 Wealth Management | Great Falls, Va. | 122.00 | -2.40 | 0.34 | -45.78 | 80.00 |
| 254 | A&F Financial Advisors | Charleston, W. Va. | 121.49 | -21.82 | 0.81 | -33.81 | 18.11 |
| 255 | Tarpley & Underwood Financial Advisors | Atlanta, Ga. | 121.09 | -21.79 | 1.07 | -16.94 | -5.83 |
| 256 | WheelerFrost Associates | San Diego, Calif. | 120.98 | -25.32 | 1.00 | -25.94 | 0.83 |
| 257 | Acorn Financial Services | Fairfax, Va. | 120.64 | -35.76 | 0.15 | -41.40 | 9.63 |
| 258 | Trinity Financial Advisors | Chicago, Ill. | 120.50 | -34.79 | 2.11 | -31.36 | -5.00 |

Source: Discover y Database. *Discretionary and nondiscretionary assets under management reported on Form ADV.

**Average assets per client relationship. † Founded in 2007, not meaningful. ‡ Founded in 2008, not meaningful.

§ Exact number not provided.

FA's 2009 RIA Ranking (By Total Assets)

| 2008 TOTAL ASSETS RANK* | FIRM NAME | LOCATION | YEAR END 2008 ASSETS (\$MM) | % GROWTH IN ASSETS 2006-2007 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|---|--------------------------------------|--------------------------|-----------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 259 | Chitwood-Lindberg Wealth Management | Birmingham, Ala. | 120.00 | -0.83 | 0.80 | -14.05% | 15.38 |
| 260 | Classic Capital | Short Hills, N.J. | 118.88 | -4.51 | 1.28 | -12.73 | 9.41 |
| 261 | Schultz Financial Group | Reno, Nev. | 118.32 | -25.83 | 1.26 | -23.46 | -3.09 |
| 262 | Hopwood Financial Services | Great Falls, Va. | 117.89 | -5.70 | 1.10 | -13.63 | 9.18 |
| 263 | Empyrion Wealth Management | Roseville, Calif. | 117.34 | -19.42 | 1.41 | -19.42 | 0.00 |
| 264 | Certified Planners | San Ramon, Calif. | 117.31 | -9.76 | 0.32 | -14.64 | 5.71 |
| 265 | Asset Management Group | Stamford, Conn. | 115.38 | -22.21 | 0.60 | -20.59 | -2.03 |
| 266 | CPFA | Greenwood Village, Colo. | 115.00 | -8.44 | 2.09 | -8.44 | 0.00 |
| 267 | Allodium Investment Consultants | Minneapolis, Minn. | 114.54 | -26.98 | 1.36 | -26.98 | 0.00 |
| 268 | Tortoise Investment Management | White Plains, N.Y. | 114.32 | 6.87 | 1.08 | -22.37 | 37.66 |
| 269 | Mutual Fund Management | Troy, Mich. | 113.71 | -29.06 | 0.44 | -29.06 | 0.00 |
| 270 | Appleton Group Wealth Management | Appleton, Wis. | 113.00 | 44.87 | 0.95 | 16.87 | 23.96 |
| 271 | Salem Partners Wealth Management | Los Angeles, Calif. | 112.14 | 43.63 | 10.19 | 4.46 | 37.50 |
| 272 | Vintage Financial Services | Ann Arbor, Mich. | 111.13 | -32.49 | 0.46 | -36.38 | 6.11 |
| 273 | KMH Wealth Management | Victoria, Texas | 109.84 | -8.69 | 0.65 | -16.21 | 8.97 |
| 274 | Financial Service Group | Racine, Wis. | 109.73 | -24.99 | 0.71 | -26.45 | 1.99 |
| 275 | Horizon Advisors | Houston, Texas | 109.45 | -17.38 | 2.19 | 17.32 | -29.58 |
| 276 | Rappaport Reiches Capital Management | Glenview, Ill. | 109.40 | 14.44 | 1.24 | -12.87 | 31.34 |
| 277 | The Lubitz Financial Group | Miami, Fla. | 108.80 | -24.97 | 1.10 | -27.24 | 3.13 |
| 278 | Signal Securities | Fort Worth, Texas | 108.00 | 4.85 | 0.27 | 32.05 | -20.59 |
| 279 | Alliance Wealth Management | Milwaukee, Wis. | 107.43 | -28.37 | 0.28 | -25.58 | -3.75 |
| 280 | National Wealth Management | Moonachie, N.J. | 107.00 | 13.83 | 1.00 | -4.26 | 18.89 |
| 281 | Bedrock Capital Management | Los Altos, Calif. | 106.44 | -28.65 | 1.01 | 12.12 | -36.36 |
| 282 | FP Financial Services | Palatine, Ill. | 105.00 | -19.23 | 0.42 | -21.15 | 2.43 |
| 283 | D B & B Financial Services | Syracuse, N.Y. | 104.45 | 3.93 | 0.39 | -1.95 | 6.00 |
| 284 | Summit Wealth Group | Colorado Springs, Colo. | 103.00 | -17.60 | 0.17 | -33.44 | 23.80 |
| 285 | Investmark | Stratford, Conn. | 102.36 | -44.66 | 0.32 | -44.15 | -0.92 |
| 286 | WJ Interests | Sugar Land, Texas | 101.60 | -23.20 | 0.80 | -30.46 | 10.43 |
| 287 | Nova Wealth Management Group | Atlanta, Ga. | 101.27 | -13.86 | 0.99 | -19.77 | 7.37 |
| ASSET CATEGORY: \$75 MILLION TO < \$100 MILLION | | | | | | | |
| 288 | Gainsborough Financial Consultants | Los Angeles, Calif. | 99.55 | -8.96 | 0.79 | -4.62 | -4.55 |
| 289 | Asset Planning Corporation | Knoxville, Tenn. | 97.93 | -25.15 | 0.78 | -22.75 | -3.10 |
| 290 | Financial Connections Group | Corte Madera, Calif. | 97.04 | -26.61 | 0.56 | -28.73 | 2.98 |
| 291 | Investment Advisory Professionals | Boca Raton, Fla. | 95.00 | -28.57 | 1.06 | -30.16 | 2.27 |
| 292 | Private Capital Management | Larkspur, Calif. | 95.00 | -13.64 | 2.11 | -7.88 | -6.25 |
| 293 | Houlihan Financial Resource Group | Reston, Va. | 94.27 | -24.07 | 1.31 | -33.56 | 14.29 |
| 294 | Witt Mares Financial Vision | Williamsburg, Va. | 94.12 | -13.22 | 0.40 | -13.59 | 0.43 |
| 295 | Camarda Financial Advisors | Fleming Island, Fla. | 91.07 | -48.84 | 0.20 | -41.74 | -12.19 |
| 296 | Miller Advisors | Kirkland, Wash. | 91.00 | -25.41 | 0.44 | -20.73 | -5.91 |
| 297 | The Advisory Group | Diamond Bar, Calif. | 90.47 | -25.89 | 0.20 | -36.22 | 16.20 |
| 298 | Focus Financial Advisors | Rockford, Ill. | 90.18 | -25.41 | 0.84 | -27.50 | 2.88 |
| 299 | Wealth Care | Merritt Island, Fla. | 90.00 | 28.57 | 1.29 | -8.16 | 40.00 |
| 300 | Kahler Financial Group | Rapid City, S.D. | 88.93 | -32.67 | 1.29 | -35.60 | 4.55 |
| 301 | Grand Wealth Management | Grand Rapids, Mich. | 88.43 | 62.64 | 0.74 | -64.76 | 361.54 |
| 302 | Focus Wealth Management | Middleburg, Va. | 86.48 | -19.93 | 1.07 | -20.92 | 1.25 |
| 303 | JG Advisors | Morristown, N.J. | 85.87 | -22.87 | 1.19 | -21.80 | -1.37 |
| 304 | YellowWood Financial Advisors | Gaithersburg, Md. | 85.29 | 9.07 | 1.12 | -32.55 | 61.70 |
| 305 | The Darrow Company | Concord, Mass. | 84.76 | -24.36 | 0.84 | -26.60 | 3.06 |
| 306 | Holbrook Global Strategies | Palo Alto, Calif. | 84.10 | -25.04 | 2.71 | -25.04 | 0.00 |

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**Average assets per client relationship. † Founded in 2007, not meaningful. ‡ Founded in 2008, not meaningful.

§ Exact number not provided.

FA's 2009 RIA Ranking (By Total Assets)

| 2008 TOTAL ASSETS RANK* | FIRM NAME | LOCATION | YEAR END 2008 ASSETS (\$MM) | % GROWTH IN ASSETS 2007-2008 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|--|---|------------------------|-----------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 307 | McCarthy Asset Management | Redwood Shores, Calif. | 82.80 | -33.33 | 0.43 | -33.33 | 0.00 |
| 308 | SKM Wealth Management | Providence, R.I. | 82.40 | -18.09 | 0.56 | -23.14 | 6.57 |
| 309 | Financial Management Concepts | Winter Springs, Fla. | 82.27 | -18.11 | 0.61 | -21.17 | 3.88 |
| 310 | 21st Century Wealth Management | York, Pa. | 81.81 | -3.83 | 1.70 | -9.84 | 6.67 |
| 311 | Kemp Financial Management | Fullerton, Calif. | 80.05 | -27.91 | 0.61 | -31.73 | 5.60 |
| 312 | Paradigm Financial Advisors | Des Peres, Mo. | 78.63 | -29.08 | 0.72 | -33.64 | 6.86 |
| 313 | RMR Financial Advisors | Madison, Wis. | 77.62 | -33.20 | 0.33 | -36.36 | 4.98 |
| 314 | Kelly Financial Group | Wethersfield, Conn. | 77.06 | -19.94 | 0.13 | -23.26 | 4.33 |
| 315 | Financial Symmetry | Raleigh, N.C. | 75.00 | -11.76 | 0.41 | -25.27 | 18.06 |
| ASSET CATEGORY: \$50 MILLION TO < \$75 MILLION | | | | | | | |
| 316 | Andrews, Lucia Wealth Management | San Mateo, Calif. | 73.37 | -26.64 | 1.16 | -34.79 | 12.50 |
| 317 | MJB Asset Management | New York, N.Y. | 73.32 | -18.43 | 0.81 | -17.53 | -1.09 |
| 318 | Wealth Planning | Cincinnati, Ohio | 72.95 | -31.03 | 0.39 | -31.76 | 1.08 |
| 319 | Century Wealth Management | Memphis, Tenn. | 71.33 | -19.64 | 4.46 | -29.68 | 14.29 |
| 320 | Cornerstone Advisory | Baltimore, Md. | 70.62 | 2.25 | 0.44 | -19.21 | 26.56 |
| 321 | Harbor Financial Group | Boulder, Colo. | 70.45 | -9.20 | 0.76 | -17.99 | 10.71 |
| 322 | Berno Financial Management | Cincinnati, Ohio | 69.86 | -27.32 | 1.00 | -27.32 | 0.00 |
| 323 | Professional Financial Strategies | Pittsford, N.Y. | 69.31 | -17.56 | 0.96 | -15.27 | -2.70 |
| 324 | The Coastal Advisory Group | Cincinnati, Ohio | 69.20 | 8.53 | 0.23 | -4.99 | 14.23 |
| 325 | RPH Financial Services | Sciota, Pa. | 68.52 | -34.89 | 0.59 | -0.10 | -34.83 |
| 326 | Royal Capital Management | Boca Raton, Fla. | 68.10 | 14.21 | 0.91 | 3.55 | 10.29 |
| 327 | Caton Financial | Larkspur, Calif. | 68.07 | -28.90 | 0.43 | -28.90 | 0.00 |
| 328 | Zeller Kern Private Wealth Management | Gold River, Calif. | 68.00 | -8.11 | 0.43 | -13.85 | 6.67 |
| 329 | Roseman Wagner Wealth Management | Loomis, Calif. | 66.47 | ‡ | 0.46 | ‡ | ‡ |
| 330 | Helm Investment Management | Denver, Colo. | 66.42 | -26.78 | 1.15 | -35.61 | 13.73 |
| 331 | SimonDavis Asset Management | Denver, Colo. | 65.85 | -0.09 | 0.13 | -30.06 | 42.86 |
| 332 | Whitcomb & Hess | Ashland, Ohio | 65.10 | -18.18 | 0.09 | -20.45 | 2.86 |
| 333 | Asset Planning | Cypress, Calif. | 65.10 | -9.90 | 0.41 | -17.89 | 9.72 |
| 334 | Sard Wealth Management Group | Atlanta, Ga. | 65.00 | -16.67 | 0.26 | -41.67 | 42.86 |
| 335 | JVL Associates | Wyoming, Mich. | 63.50 | -34.74 | 3.97 | -34.74 | 0.00 |
| 336 | Kasanow & Associates: Wealth Management | Honolulu, Hawaii | 63.41 | -23.93 | 0.55 | -19.96 | -4.96 |
| 337 | JDH Wealth Management | Santa Rosa, Calif. | 61.86 | -22.79 | 0.94 | -25.13 | 3.13 |
| 338 | Covenant Wealth Advisors | Williamsburg, Va. | 61.61 | -16.26 | 0.62 | -23.87 | 10.00 |
| 339 | Dorman Financial Management | Maitland, Fla. | 61.00 | -35.79 | 0.24 | -35.79 | 0.00 |
| 340 | Mader & Shannon Wealth Management | Kansas City, Mo. | 59.30 | 20.98 | 0.46 | -4.15 | 26.21 |
| 341 | Ivy League Financial Advisors | Rockville, Md. | 57.53 | -22.62 | 0.65 | -24.36 | 2.30 |
| 342 | Family Wealth Advisory Group | Cincinnati, Ohio | 57.36 | -26.25 | 0.40 | -29.86 | 5.15 |
| 343 | Wealth Planners | Baton Rouge, La. | 57.08 | -28.68 | 0.11 | -18.72 | -12.25 |
| 344 | Prudent Money Financial Services | Irving, Texas | 55.77 | 49.56 | 0.17 | 13.54 | 31.73 |
| 345 | Tampa Asset Management | Tampa, Fla. | 55.50 | ‡ | 0.58 | ‡ | ‡ |
| 346 | Corbin & Company | Fort Worth, Texas | 54.45 | 0.13 | 0.61 | -2.12 | 2.30 |
| 347 | LJ Cooper Capital Management | Orem, Utah | 52.12 | -22.63 | 0.37 | -28.15 | 7.69 |
| 348 | Charleston Financial Advisors | Charleston, S.C. | 51.70 | -19.82 | 0.47 | -15.49 | -5.13 |
| 349 | Martin Thomas Wealth Management | Palo Alto, Calif. | 51.25 | ‡ | 0.68 | ‡ | ‡ |
| 350 | Greenspring Wealth Management | Towson, Md. | 50.78 | 34.24 | 0.48 | 20.18 | 11.70 |
| 351 | Cypress Advisory Services | Houston, Texas | 50.18 | -6.78 | 0.88 | -14.96 | 9.62 |
| 352 | Comprehensive Money Management Services | Coral Gables, Fla. | 50.00 | 25.00 | 0.77 | 5.77 | 18.18 |

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 § Exact number not provided.

FA's 2009 RIA Ranking (By Total Assets)

| 2008 TOTAL ASSETS RANK* | FIRM NAME | LOCATION | YEAR END 2008 ASSETS (\$MM) | % GROWTH IN ASSETS 2007-2008 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|--|--|--------------------------|--------------------------------------|---------------------------------------|-------------------------------------|--|-------------------------------------|
| ASSET CATEGORY: < \$50 MILLION | | | | | | | |
| 353 | Gasaway Investment Advisors | Portage, Mich. | 49.32 | -23.37 | 0.15 | -15.66 | -9.14 |
| 354 | Wealth Management Corporation | Tallahassee, Fla. | 48.42 | -24.41 | 0.13 | -21.08 | -4.22 |
| 355 | Mueller Financial Solutions | Canon City, Colo. | 46.85 | -27.33 | 0.21 | -29.32 | 2.82 |
| 356 | Cypress Asset Management | Peoria Heights, Ill. | 46.09 | -13.81 | 1.12 | -20.12 | 7.89 |
| 357 | Money Professionals | Pensacola, Fla. | 45.89 | -11.92 | 0.39 | -15.62 | 4.39 |
| 358 | The Personal Wealth Coach | Salado, Texas | 44.03 | -20.26 | 0.35 | -52.16 | 66.67 |
| 359 | CTB Financial Services | St. Louis Park, Minn. | 40.00 | 14.29 | 0.40 | -2.86 | 17.65 |
| 360 | Inspired Financial | Huntington Beach, Calif. | 40.00 | -20.00 | 0.44 | -20.00 | 0.00 |
| 361 | Cornerstone Asset Management Services | Parma, Ohio | 37.75 | -23.39 | 0.08 | -17.26 | -7.41 |
| 362 | Permanent Value | San Diego, Calif. | 37.40 | -46.57 | 0.17 | -52.51 | 12.50 |
| 363 | D. L. Blain & Co. | New Bern, N.C. | 37.36 | 52.65 | 0.76 | 33.96 | 13.95 |
| 364 | Elderado Financial | Montrose, Colo. | 36.03 | -0.11 | 0.18 | 1.43 | -1.52 |
| 365 | Crow Financial Advisors | Albuquerque, N.M. | 30.21 | -18.06 | 0.19 | -20.16 | 2.63 |
| 366 | The Financial Well | Tampa, Fla. | 26.05 | -19.71 | 0.62 | -15.88 | -4.55 |
| 367 | DAAT Asset Management | Westlake Village, Calif. | 25.00 | 25.00 | 0.17 | -16.67 | 50.00 |
| 368 | David J. Yvars Group | Valhalla, N.Y. | 24.49 | -75.72 | 0.12 | -76.96 | 5.38 |
| 369 | Warburton Capital | Tulsa, Okla. | 22.50 | 28.57 | 0.22 | 0.84 | 27.50 |
| 370 | Aegis Capital Management | Emeryville, Calif. | 21.84 | -19.09 | 0.87 | -25.56 | 8.70 |
| 371 | Smith Asset Management | Yardley, Pa. | 21.49 | 2.35 | 0.83 | -5.52 | 8.33 |
| 372 | Typher Financial Services | Highlands Ranch, Colo. | 20.00 | 11.11 | 0.50 | -2.78 | 14.29 |
| 373 | Purtill Financial | Highland Heights, Ohio | 13.71 | 52.83 | 0.27 | 16.15 | 31.58 |
| 374 | Hudson Capital Management | Ridgewood, N.J. | 12.45 | 0.54 | 0.36 | -31.06 | 45.83 |
| 375 | Financial Advisors for Life | San Antonio, Texas | 11.20 | 34.94 | 0.51 | -8.00 | 46.67 |
| 376 | Quality Asset Management | Menlo Park, Calif. | 10.34 | -45.78 | 0.45 | -45.78 | 0.00 |
| 377 | Wynn Capital Management | Ben Lomond, Calif. | 8.21 | 0.34 | 0.22 | 13.90 | -11.90 |
| 378 | American Tax & Financial Group | Alpharetta, Ga. | 3.59 | 25.09 | 0.09 | -19.81 | 56.00 |
| 379 | Farfield Investments and Wealth Management | Columbus, Ohio | 3.18 | † | 0.20 | †† | |
| 380 | Beacon Financial Advisors | Tarrytown, N.Y. | 1.00 | -50.00 | 0.03 | -47.44 | -4.88 |

Source: Discover y Database. *Discretionary and nondiscretionary assets under management reported on Form ADV.
 **Average assets per client relationship. † Founded in 2007, not meaningful. ‡ Founded in 2008, not meaningful.
 § Exact number not provided.

