

FINANCIAL ADVISOR

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RIA

SURVEY AND RANKING 2018

AUM AND THE VALUATION PARADOX
Asset-Based Pricing Doesn't Guarantee Higher Valuation

FINANCIAL ENGINES + EDELMAN = LOVE
It Could Be A Formidable Platform That Competes With The Big Players

LEANER AND MEANER WITH TECH
Technology Allows RIAs To Boost Profits And Shrink Staffs

TOP 50 FASTEST-GROWING FIRMS With More Than \$250 Million In AUM

GROWTH RANK	FIRM NAME	LOCATION	2017 CLIENTS	YEAR END 2017 ASSETS (\$MM)	% GROWTH IN ASSETS 2016-2017	% GROWTH IN ASSETS PER CLIENT
1	Cabana (dba Cabana Asset Management) †	Fayetteville, Ark.	2,298	301.19	926.66%	9.46%
2	AE Wealth Management	Topeka, Kan.	13,123	2,759.05	303.64%	72.61%
3	Per Stirling Capital Management	Austin, Texas	739	622.35	179.12%	39.75%
4	Lucia Capital Group	San Diego, Calif.	3,725	1,368.94	175.33%	100.31%
5	Inspire Investing	Hollister, Calif.	396	130.85	134.29%	77.50%
6	Brightworth	Atlanta, Ga.	1,300	3,334.40	133.02%	14.72%
7	Kingsview Asset Management	Grants Pass, Ore.	4,500	801.38	113.33%	65.93%
8	HoyleCohen	San Diego, Calif.	1,121	1,728.22	109.96%	-3.54%
9	Rainier Financial Group	Seattle, Wash.	120	262.33	108.77%	47.88%
10	Duncan Williams Asset Management	Memphis, Tenn.	262	277.44	88.86%	44.16%
11	Trilogy Capital	Huntington Beach, Calif.	5,431	658.23	87.79%	-22.13%
12	CIBC Atlantic Trust Private Wealth Management	Atlanta, Ga.	6,818	18,733.80	85.36%	12.01%
13	Altium Wealth Management	Purchase, N.Y.	675	911.42	82.46%	62.19%
14	Belpointe Asset Management	Greenwich, Conn.	2,957	1,016.56	77.79%	3.41%
15	Fulcrum Capital	Seattle, Wash.	75	479.46	72.55%	24.24%
16	Virtue Capital Management	Brentwood, Tenn.	4,716	340.36	71.48%	7.49%
17	Aurum Wealth Management	Mayfield Village, Ohio	741	860.00	70.43%	-47.79%
18	HM Capital Management	Clayton, Mo.	101	2,441.73	64.59%	54.81%
19	Joule Financial	Lexington, Ky.	425	139.54	62.74%	43.59%
20	Lido Advisors	Los Angeles, Calif.	900	2,772.83	60.64%	16.02%
21	Heritage Way Advisors	Rockford, Ill.	137	277.30	60.09%	32.04%
22	Bitterroot Capital Advisors	Bozeman, Mont.	15	1,083.11	59.90%	49.24%
23	Elsner Financial Planning	Indianapolis, Ind.	147	300.02	59.70%	32.54%
24	Auour Investments	Wenham, Mass.	216	207.17	57.73%	16.83%
25	RMB Capital Management	Chicago, Ill.	1,683	8,226.71	57.54%	39.19%
26	Greenspring Advisors	Towson, Md.	408	3,228.44	57.13%	39.42%
27	6 Meridian	Wichita, Kan.	580	1,427.83	56.79%	17.32%
28	Fiduciary Wealth Management	Alexandria, Va.	199	177.51	56.72%	38.61%
29	Massey Quick Simon	Morristown, N.J.	270	3,027.74	56.59%	18.89%
30	Apex Financial Advisors	Yardley, Pa.	102	272.56	56.10%	45.39%
31	The Mather Group	Chicago, Ill.	897	1,512.14	55.12%	24.51%
32	Mercer Global Advisors	Santa Barbara, Calif.	7,147	11,053.47	51.95%	27.76%
33	Gradient Investments	Arden Hills, Minn.	10,829	1,903.05	51.26%	24.83%
34	Ritholtz Wealth Management	New York, N.Y.	575	708.00	49.68%	10.64%
35	Tiedemann Advisors	New York, N.Y.	452	12,301.60	49.57%	44.94%
36	Genovese Burford & Brothers	Sacramento, Calif.	1,174	2,019.02	46.69%	21.20%
37	SAX Wealth Advisors	Clifton, N.J.	673	895.33	45.96%	7.79%
38	Versant Capital Management	Phoenix, Ariz.	383	909.28	45.81%	-23.86%
39	Investmark Advisory Group	Stratford, Conn.	538	444.96	44.47%	34.26%
40	TFO-TDC	Maumee, Ohio	1,321	2,375.25	44.12%	45.75%
41	Creative Planning	Leawood, Kan.	20,500	32,017.25	44.01%	8.88%
42	Cahaba Wealth Management	Atlanta, Ga.	464	580.36	43.61%	27.83%
43	Capital Wealth Planning	Naples, Fla.	2,200	930.00	43.08%	0.80%
44	AJ Wealth	New York, N.Y.	173	764.00	42.35%	7.79%
45	Ensemble Capital Management	Burlingame, Calif.	148	718.47	42.26%	24.96%

† Firm had significant increase in sub-advisory money management business.



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