

FINANCIAL ADVISOR

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RIA SURVEY & RANKING

The Next Recession

It May Be Further Away Than Many Fear

Advisor Tech—The Latest

Trends Playing A Role In Advisor Success

End Of Dividend Joyride?

Payout Increases May Slow



FA's 2016 RIA RANKING

2015 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2015 ASSETS (\$MM)*	% GROWTH IN ASSETS 2014-2015	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
ASSET CATEGORY: \$1 BILLION AND OVER							
1	CAPTRUST	Raleigh, N.C.	169,104.13	15.28%	\$52.80	5.28%	9.50%
2	First Republic Investment Management	San Francisco, Calif.	47,210.89	33.74%	\$4.16	-11.67%	51.41%
3	CTC myCFO	Chicago, Ill.	32,070.00	11.05%	\$145.77	6.00%	4.76%
4	Hall Capital Partners	San Francisco, Calif.	28,971.37	-3.78%	\$216.20	-5.21%	1.52%
5	HighTower Advisors	Chicago, Ill.	24,600.00	19.44%	\$2.46	1.52%	17.65%
6	Silvercrest Asset Management Group	New York, N.Y.	18,100.00	1.12%	\$29.38	-10.87%	13.44%
7	Creative Planning	Leawood, Kan.	16,583.54	25.64%	\$1.44	9.25%	15.00%
8	SCS Financial	Boston, Mass.	16,080.00	13.80%	\$126.61	5.74%	7.63%
9	United Capital Financial Advisers	Newport Beach, Calif.	15,406.38	38.26%	\$0.97	-7.20%	48.99%
10	Edelman Financial Services	Fairfax, Va.	14,880.00	6.81%	\$0.51	-5.81%	13.39%
11	Moneta Group	St. Louis, Mo.	14,528.00	3.28%	\$3.23	-3.61%	7.14%
12	Veritable	Newtown Square, Pa.	13,588.46	1.04%	\$63.20	-1.78%	2.87%
13	Oxford Financial Group	Indianapolis, Ind.	13,576.98	-1.75%	\$18.10	-14.85%	15.38%
14	Innovest Portfolio Solutions	Denver, Colo.	12,594.00	42.10%	\$49.58	30.35%	9.01%
15	Plante Moran Financial Advisors	Southfield, Mich.	12,400.12	12.76%	\$4.96	8.25%	4.17%
16	Mariner Wealth Advisors	Leawood, Kan.	12,276.91	21.51%	\$1.95	-2.25%	24.31%
17	BBR Partners	New York, N.Y.	10,858.40	22.22%	\$95.25	11.50%	9.62%
18	Brownson, Rehmus & Foxworth	Chicago, Ill.	9,989.80	-1.36%	\$18.78	-0.62%	-0.75%
19	Segall Bryant & Hamill	Chicago, Ill.	9,592.24	-1.41%	\$3.86	-6.60%	5.56%
20	Atlantic Trust	Atlanta, Ga.	9,417.37	-14.66%	\$3.39	-19.48%	5.99%
21	DiMeo Schneider & Associates	Chicago, Ill.	9,318.46	11.57%	\$27.09	5.74%	5.52%
22	Advanced Research Investment Solutions	Beverly Hills, Calif.	9,131.72	9.05%	\$253.66	-24.27%	44.00%
23	GenSpring Family Offices	Jupiter, Fla.	8,603.15	-11.39%	\$31.06	14.20%	-22.41%
24	Johnson Investment Counsel	Cincinnati, Ohio	8,347.41	-3.78%	\$2.95	-5.96%	2.31%
25	Geneva Advisors	Chicago, Ill.	7,825.27	0.39%	\$1.92	-3.92%	4.49%
26	Beacon Pointe Advisors	Newport Beach, Calif.	7,538.23	2.43%	\$5.38	-4.88%	7.69%
27	Ronald Blue & Co.	Roswell, Ga.	6,636.50	-19.77%	\$0.95	-30.08%	14.75%
28	Evercore Wealth Management	New York, N.Y.	6,212.73	9.02%	\$10.35	-9.15%	20.00%
29	Litman Gregory	Larkspur, Calif.	6,148.70	-18.38%	\$17.67	-22.13%	4.82%
30	Athena Capital Advisors	Lincoln, Mass.	5,998.71	0.62%	\$142.83	3.02%	-2.33%
31	Ballentine Partners	Waltham, Mass.	5,989.73	14.34%	\$35.44	3.52%	10.46%
32	Global Financial Private Capital	Sarasota, Fla.	5,864.32	7.79%	\$0.14	-50.64%	118.39%
33	Gresham Partners	Chicago, Ill.	5,522.34	16.06%	\$64.97	3.77%	11.84%
34	Pathstone Federal Street	Boston, Mass.	5,506.27	3.15%	\$29.76	0.36%	2.78%
35	Tiedemann Wealth Management	New York, N.Y.	5,163.45	-3.24%	\$34.20	-9.01%	6.34%
36	GW & Wade	Wellesley, Mass.	5,074.36	0.30%	\$2.18	4.09%	-3.64%
37	The Colony Group	Boston, Mass.	5,031.50	31.96%	\$2.78	15.53%	14.22%
38	Mill Creek Capital Advisors	Conshohocken, Pa.	4,706.12	22.62%	\$15.33	7.04%	14.55%
39	Heber Fuger Wendin	Bloomfield Hills, Mich.	4,560.23	0.96%	\$36.19	-0.64%	1.61%
40	Clarfeld Financial Advisors	Tarrytown, N.Y.	4,560.00	-1.41%	\$11.84	-3.97%	2.67%
41	Tolleson Wealth Management	Dallas, Texas	4,532.18	2.57%	\$29.82	-5.53%	8.57%
42	Douglas Lane & Associates	New York, N.Y.	4,389.22	0.25%	\$3.66	-16.46%	20.00%
43	Cornerstone Advisors Asset Management	Bethlehem, Pa.	4,375.64	-3.08%	\$37.40	-3.91%	0.86%
44	RGT Wealth Advisors	Dallas, Texas	4,361.61	16.17%	\$7.02	-5.53%	22.97%
45	Ferguson Wellman Capital Management	Portland, Ore.	4,300.88	2.65%	\$5.79	-2.46%	5.24%

* Discretionary and nondiscretionary AUM reported on Form ADV. ** Average assets per client relationship. NM = not meaningful.



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