

# FIA

FINANCIAL ADVISOR



# RIA

## SURVEY & RANKING

# 2014

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# FA'S 2014 RIA RANKING

(By Total Assets)

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2013 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2013 ASSETS (\$MM)	% GROWTH IN ASSETS 2012-2013	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
487	Brown McLeod dba Brown Financial Advisory	Fairhope, Ala.	107.92	18.91	0.68	8.44	9.66
488	The Blakeley Group	Santa Clara, Calif.	106.82	0.00	1.59	-8.96	9.84
489	Garnet Group	Bethesda, Md.	106.79	16.57	2.43	8.62	7.32
490	Northstar Financial Planners	Plantation, Fla.	104.18	27.33	0.51	13.53	12.15
491	Alpha Wealth Strategies	Kingwood, Texas	103.81	17.67	6.92	17.67	0.00
492	Red Door Wealth Management	Memphis, Tenn.	102.85	37.92	1.03	17.23	17.65
493	Novos Planning Associates	New York, N.Y.	102.04	9.97	1.62	13.46	-3.08
494	Paragon Wealth Management	Provo, Utah	100.95	0.20	0.68	2.22	-1.97
495	SiligmueLLer & Norvid Wealth Advisors	Glen Ellyn, Ill.	100.00	17.65	1.67	-5.88	25.00
496	Colman Knight Advisory Group	Carlisle, Mass.	100.00	0.00	1.54	3.08	-2.99
<b>ASSET CATEGORY: \$75 MILLION TO &lt;\$100 MILLION</b>							
497	Palisade Investments	Stateline, Nev.	99.31	40.07	0.99	0.85	38.89
498	Alpha Financial Advisors	Charlotte, N.C.	92.99	46.41	0.73	32.68	10.34
499	MontVue Capital Management	Lynchburg, Va.	91.87	26.16	0.81	-2.61	29.55
500	Pauley Financial	Austin, Texas	91.05	0.00	1.82	20.00	-16.67
501	Summit Place Financial Advisors	Summit, N.J.	85.19	25.91	6.09	16.92	7.69
502	Clay Northam Wealth Management	Seal Beach, Calif.	78.06	48.11	0.31	33.30	11.11
503	Cathy Pareto and Associates	Coral Gables, Fla.	77.12	23.37	0.77	8.57	13.64
504	Sage Future Financial	Albuquerque, N.M.	75.24	22.18	1.88	13.02	8.11
<b>ASSET CATEGORY: \$50 MILLION TO &lt;\$75 MILLION</b>							
505	Ron Beaton's Money Matters	Paducah, Ky.	69.00	21.16	1.23	18.99	1.82
506	Northvest	Keene, N.H.	67.00	17.54	1.31	17.54	0.00
507	BrightPath Wealth Planning	Santa Barbara, Calif.	66.30	30.52	0.95	49.1	-12.50
508	FPC Investment Advisory	Petaluma, Calif.	65.00	22.64	0.67	20.11	2.11
509	St. John & Associates	Roswell, Ga.	64.45	13.27	0.52	5.11	7.76
510	Elderado Financial	Montrose, Colo.	61.12	9.84	0.29	5.61	4.00
511	Jarvis Financial Services	Federal Way, W. Va.	60.00	50.00	0.46	32.69	13.04
512	Artifex Financial Group	Oakwood, Ohio	60.00	0.00	0.24	-28.00	38.89
513	G. DeWayne McAnally	Oklahoma City, Okla.	57.55	11.66	0.16	-7.16	20.27
514	Bills Asset Management	Franklin, Tenn.	55.82	3.42	0.25	-1.28	4.76
515	Mission Creek Capital Partners	San Francisco, Calif.	55.08	409.99	0.69	91.25	166.67
516	Gold Medal Waters	Boulder, Colo.	54.78	17.61	0.55	4.54	12.50
517	Woloshin Investment Management	Medford, N.J.	54.50	70.31	0.14	39.74	21.88
518	Financial Life Advisors	San Antonio, Texas	51.70	25.48	0.78	8.36	15.79
519	Sherwood Investment Services	Redmond, Wash.	50.00	25.00	1.00	0.00	25.00
<b>ASSET CATEGORY: &lt;\$50 MILLION</b>							
520	RHS Financial	San Francisco, Calif.	47.00	28.77	0.57	13.25	13.70
521	Netherby Advisors	Westport, Conn.	45.19	34.36	0.60	7.48	25.00
522	Family Office Advisors	New York, N.Y.	39.00	-7.14	3.55	-15.58	10.00
523	Safe Harbor Asset Management	Huntington, N.Y.	33.00	87.56	0.75	53.46	22.22
524	Pohlman Capital Advisors	Chapel Hill, N.C.	32.32	16.37	5.39	-61.21	200.00
525	Horizons Sustainable Financial Services	Santa Fe, N.M.	22.80	†	0.11	†	†
526	MangoTree Capital	Sterling Heights, Mich.	22.00	83.33	0.44	-8.33	100.00
527	Synergy Financial Group of Arizona	Scottsdale, Ariz.	20.58	-71.80	0.08	-63.54	-22.67
528	Timmons Wealth Management	Attleboro, Mass.	7.73	274.18	0.26	37.20	172.73
529	Coroebus Wealth Management	Newark, N.J.	5.40	†	2.70	†	†

\*Discretionary and nondiscretionary assets under management reported on Form ADV. \*\*Average assets per client relationship. † Founded in 2013, not meaningful.

\*Firms with less than \$50 million AUM appear in the online version of this ranking.