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RAYMOND JAMES



# FA's 2021 RIA RANKING



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| 2020 TOTAL ASSETS RANK                      | FIRM NAME                              | LOCATION              | YEAR END 2020 ASSETS (\$MM)* | % GROWTH IN ASSETS 2019-2020 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|---|--|-----------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| <b>ASSET CATEGORY: \$1 BILLION AND OVER</b> |  |                       |                              |                              |                            |                               |                            |
| 1   | CAPTRUST                               | Raleigh, N.C.         | 450,010.40                   | 15.64%                       | \$31.40                    | -25.14%                       | 54.48%                     |
| 2   | Edelman Financial Engines              | Boston, Mass.         | 260,100.00                   | 13.58%                       | \$0.20                     | 10.06%                        | 3.20%                      |
| 3   | First Republic Investment Management   | San Francisco, Calif. | 106,485.11                   | 22.00%                       | \$5.25                     | 2.76%                         | 18.72%                     |
| 4   | Global Retirement Partners             | San Rafael, Calif.    | 77,817.09                    | 20.03%                       | \$14.74                    | 6.75%                         | 12.44%                     |
| 5   | Creative Planning                      | Overland Park, Kan.   | 69,482.47                    | 45.00%                       | \$1.70                     | 8.21%                         | 33.99%                     |
| 6   | Fort Washington Investment Advisors    | Cincinnati, Ohio      | 69,352.58                    | 17.13%                       | \$138.71                   | 11.28%                        | 5.26%                      |
| 7   | CIBC Private Wealth, US                | Atlanta, Ga.          | 45,888.99                    | 69.51%                       | \$5.55                     | 61.72%                        | 4.82%                      |
| 8   | Mariner Wealth Advisors                | Overland Park, Kan.   | 34,961.18                    | 18.78%                       | \$1.53                     | 10.92%                        | 7.08%                      |
| 9   | Fiducient Advisors                     | Chicago, Ill.         | 28,304.26                    | 48.04%                       | \$47.81                    | 11.28%                        | 33.03%                     |
| 10  | Silvercrest Asset Management Group     | New York, N.Y.        | 27,818.59                    | 10.96%                       | \$34.13                    | 7.56%                         | 3.16%                      |
| 11  | Moneta                                 | St. Louis, Mo.        | 27,417.70                    | 15.52%                       | \$5.04                     | 6.27%                         | 8.71%                      |
| 12  | Advanced Capital Group                 | Minneapolis, Minn.    | 26,614.69                    | 13.54%                       | \$89.31                    | 8.97%                         | 4.20%                      |
| 13  | Wealth Enhancement Group               | Plymouth, Minn.       | 24,264.06                    | 75.55%                       | \$1.03                     | 25.51%                        | 39.87%                     |
| 14  | Segall Bryant & Hamill                 | Chicago, Ill.         | 22,890.77                    | 16.43%                       | \$9.08                     | 8.21%                         | 7.60%                      |
| 15  | BBR Partners                           | New York, N.Y.        | 20,707.90                    | 15.77%                       | \$128.62                   | 7.14%                         | 8.05%                      |
| 16  | Mercer Global Advisors                 | Denver, Colo.         | 19,869.91                    | 25.37%                       | \$1.17                     | -11.53%                       | 41.70%                     |
| 17  | Pathstone                              | Boston, Mass.         | 19,577.07                    | 90.97%                       | \$19.58                    | -42.90%                       | 234.45%                    |
| 18  | Buckingham Strategic Wealth            | Clayton, Mo.          | 18,960.00                    | 22.14%                       | \$1.94                     | 8.90%                         | 12.16%                     |
| 19  | Tiedemann Advisors                     | New York, N.Y.        | 18,415.00                    | 6.33%                        | \$48.21                    | 17.74%                        | -9.69%                     |
| 20  | 1919 Investment Counsel                | New York, N.Y.        | 17,554.38                    | 16.12%                       | \$8.02                     | -24.18%                       | 53.15%                     |
| 21  | Bahl & Gaynor Investment Counsel       | Cincinnati, Ohio      | 16,408.94                    | 5.78%                        | \$21.91                    | 1.96%                         | 3.74%                      |
| 22  | Plante Moran Financial Advisors        | Southfield, Mich.     | 16,319.54                    | -5.53%                       | \$5.56                     | -6.78%                        | 1.35%                      |
| 23  | Johnson Investment Counsel             | Cincinnati, Ohio      | 15,525.43                    | 18.35%                       | \$3.52                     | 0.32%                         | 17.98%                     |
| 24  | Carson Wealth                          | Omaha, Neb.           | 15,210.61                    | 21.28%                       | \$2.81                     | -23.05%                       | 57.62%                     |
| 25  | Newport Capital Group                  | Red Bank, N.J.        | 14,995.73                    | 11.52%                       | \$73.15                    | -1.53%                        | 13.26%                     |
| 26  | Boston Private Wealth                  | Boston, Mass.         | 14,427.65                    | 8.35%                        | \$4.52                     | 6.24%                         | 1.98%                      |
| 27  | Aspiriant                              | Los Angeles, Calif.   | 13,781.81                    | -0.88%                       | \$7.93                     | -4.42%                        | 3.70%                      |
| 28  | Signature Estate & Investment Advisors | Los Angeles, Calif.   | 13,632.02                    | 65.52%                       | \$1.45                     | 46.38%                        | 13.08%                     |
| 29  | The Colony Group                       | Boston, Mass.         | 13,054.04                    | 13.01%                       | \$3.35                     | 9.22%                         | 3.47%                      |
| 30  | LeafHouse Financial                    | Austin, Texas         | 12,902.45                    | 34.70%                       | \$6.77                     | 9.89%                         | 22.57%                     |
| 31  | Wealthspire Advisors                   | New York, N.Y.        | 12,715.45                    | 19.52%                       | \$2.80                     | -11.55%                       | 35.13%                     |
| 32  | AE Wealth Management                   | Topeka, Kan.          | 12,637.10                    | 47.22%                       | \$0.24                     | 19.22%                        | 23.49%                     |
| 33  | Beacon Pointe Advisors                 | Newport Beach, Calif. | 12,441.99                    | 25.05%                       | \$2.11                     | -7.80%                        | 35.63%                     |
| 34  | Cresset                                | Chicago, Ill.         | 11,677.08                    | 93.13%                       | \$12.29                    | -8.11%                        | 110.18%                    |
| 35  | EP Wealth Advisors                     | Torrance, Calif.      | 10,751.30                    | 55.14%                       | \$1.30                     | 2.80%                         | 50.91%                     |
| 36  | Eaton Vance WaterOak Advisors          | Boston, Mass.         | 10,364.19                    | 33.86%                       | \$6.61                     | -24.49%                       | 77.29%                     |
| 37  | WE Family Offices                      | Miami, Fla.           | 10,200.64                    | 19.48%                       | \$118.61                   | 8.37%                         | 10.26%                     |
| 38  | Evercore Wealth Management             | New York, N.Y.        | 10,166.56                    | 10.54%                       | \$14.97                    | -0.85%                        | 11.49%                     |
| 39  | Allworth Financial                     | Sacramento, Calif.    | 10,118.71                    | 24.99%                       | \$0.77                     | 6.94%                         | 16.88%                     |
| 40  | myCIO Wealth Partners                  | Philadelphia, Pa.     | 9,913.02                     | 11.97%                       | \$12.10                    | 3.36%                         | 8.33%                      |
| 41  | Mason Investment Advisory Services     | Reston, Va.           | 9,527.64                     | 14.37%                       | \$13.11                    | 10.12%                        | 3.86%                      |
| 42  | MAI Capital Management                 | Cleveland, Ohio       | 9,248.84                     | 29.06%                       | \$3.56                     | -23.96%                       | 69.72%                     |
| 43  | Savant Wealth Management               | Rockford, Ill.        | 8,954.58                     | 33.89%                       | \$1.39                     | 9.06%                         | 22.77%                     |
| 44  | Homrich Berg                           | Atlanta, Ga.          | 8,929.22                     | 27.83%                       | \$4.15                     | 18.91%                        | 7.50%                      |
| 45  | Ballentine Partners                    | Waltham, Mass.        | 8,673.38                     | 9.40%                        | \$36.29                    | 5.74%                         | 3.46%                      |
| 46  | TAG Associates                         | New York, N.Y.        | 8,641.47                     | 3.50%                        | \$78.56                    | 3.50%                         | 0.00%                      |
| 47  | Brighton Jones                         | Seattle, Wash.        | 8,443.26                     | 24.17%                       | \$3.99                     | 6.09%                         | 17.04%                     |
| 48  | RMB Capital                            | Chicago, Ill.         | 8,438.73                     | -2.61%                       | \$4.46                     | -7.44%                        | 5.22%                      |
| 49  | GW & Wade                              | Wellesley, Mass.      | 8,291.84                     | 23.75%                       | \$2.65                     | -1.69%                        | 25.88%                     |
| 50  | Mill Creek Capital Advisors            | Conshohocken, Pa.     | 8,050.91                     | 19.64%                       | \$23.07                    | 13.13%                        | 5.76%                      |

\*Discretionary and nondiscretionary AUM reported on Form ADV. \*\*Average assets per client relationship. †Transitioned to an independent RIA in 2020.

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# FA's 2021 RIA RANKING



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| 2020 TOTAL ASSETS RANK | FIRM NAME                          | LOCATION              | YEAR END 2020 ASSETS (\$MM)* | % GROWTH IN ASSETS 2019-2020 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|------------------------|------------------------------------|-----------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 51                     | Americh Massena                    | Portland, Ore.        | 7,892.10                     | 9.96%                        | \$23.77                    | 4.33%                         | 5.40%                      |
| 52                     | Lido Advisors                      | Los Angeles, Calif.   | 7,692.39                     | 42.36%                       | \$2.73                     | 2.88%                         | 38.37%                     |
| 53                     | CV Advisors                        | Aventura, Fla.        | 7,660.77                     | 12.48%                       | \$90.13                    | 4.54%                         | 7.59%                      |
| 54                     | Freestone Capital Management       | Seattle, Wash.        | 7,223.48                     | 33.72%                       | \$3.46                     | 19.64%                        | 11.76%                     |
| 55                     | Bartlett Wealth Management         | Cincinnati, Ohio      | 7,189.17                     | 10.51%                       | \$3.74                     | 15.97%                        | -4.71%                     |
| 56                     | Brookstone Capital Management      | Wheaton, Ill.         | 7,015.84                     | 137.83%                      | \$0.21                     | 22.41%                        | 94.29%                     |
| 57                     | RSM US Wealth Management           | Minneapolis, Minn.    | 7,011.27                     | 13.01%                       | \$1.87                     | 11.57%                        | 1.30%                      |
| 58                     | Tolleson Private Wealth Management | Dallas, Texas         | 6,878.35                     | 3.75%                        | \$38.64                    | 2.58%                         | 1.14%                      |
| 59                     | Douglas C. Lane & Associates       | New York, N.Y.        | 6,877.25                     | 9.16%                        | \$5.66                     | 9.16%                         | 0.00%                      |
| 60                     | Wetherby Asset Management          | San Francisco, Calif. | 6,572.33                     | 15.23%                       | \$11.35                    | 9.86%                         | 4.89%                      |
| 61                     | Monroe Vos Consulting              | Houston, Texas        | 6,541.48                     | 16.26%                       | \$62.30                    | 9.61%                         | 6.06%                      |
| 62                     | Adviser Investments                | Newton, Mass.         | 6,541.32                     | 12.08%                       | \$1.73                     | 12.85%                        | -0.68%                     |
| 63                     | Valeo Financial Advisors           | Carmel, Ind.          | 6,391.63                     | 29.85%                       | \$3.55                     | 15.42%                        | 12.50%                     |
| 64                     | Ropes Wealth Advisors              | Boston, Mass.         | 6,331.32                     | 26.28%                       | \$5.48                     | 33.27%                        | -5.25%                     |
| 65                     | Welch & Forbes                     | Boston, Mass.         | 6,264.29                     | 12.06%                       | \$7.68                     | 8.49%                         | 3.29%                      |
| 66                     | Conrad Siegel Investment Advisors  | Harrisburg, Pa.       | 6,170.05                     | 6.31%                        | \$19.90                    | 9.74%                         | -3.13%                     |
| 67                     | Brownson, Rehms & Foxworth         | Chicago, Ill.         | 6,024.77                     | 8.15%                        | \$14.04                    | 12.69%                        | -4.03%                     |
| 68                     | Altair Advisors                    | Chicago, Ill.         | 6,024.31                     | 18.18%                       | \$17.98                    | 9.72%                         | 7.72%                      |
| 69                     | Heck Capital Advisors              | Rhineland, Wis.       | 5,953.45                     | 4.27%                        | \$5.79                     | -1.10%                        | 5.43%                      |
| 70                     | Northside Capital Management       | Hood River, Ore.      | 5,843.78                     | 23.45%                       | \$177.08                   | 12.22%                        | 10.00%                     |
| 71                     | Gofen and Glossberg                | Chicago, Ill.         | 5,555.83                     | 11.83%                       | \$5.67                     | 8.52%                         | 3.05%                      |
| 72                     | Sequoia Financial Group            | Akron, Ohio           | 5,547.44                     | 20.13%                       | \$1.49                     | 11.03%                        | 8.19%                      |
| 73                     | Joel Isaacson & Co.                | New York, N.Y.        | 5,515.35                     | 15.07%                       | \$4.81                     | 17.87%                        | -2.38%                     |
| 74                     | Dowling & Yahnke                   | San Diego, Calif.     | 5,480.15                     | 15.85%                       | \$4.09                     | 10.05%                        | 5.27%                      |
| 75                     | The Mather Group                   | Chicago, Ill.         | 5,424.41                     | 35.99%                       | \$2.51                     | -8.06%                        | 47.91%                     |
| 76                     | BDF                                | Itasca, Ill.          | 5,366.48                     | 16.79%                       | \$3.74                     | 10.19%                        | 5.99%                      |
| 77                     | Forum Financial Management         | Lombard, Ill.         | 5,365.78                     | 17.98%                       | \$1.34                     | 12.82%                        | 4.58%                      |
| 78                     | Arlington Partners                 | Birmingham, Ala.      | 5,314.49                     | -1.98%                       | \$38.23                    | -13.97%                       | 13.93%                     |
| 79                     | Greenspring Advisors               | Towson, Md.           | 5,248.23                     | 11.92%                       | \$8.99                     | -6.28%                        | 19.43%                     |
| 80                     | RegentAtlantic                     | Morristown, N.J.      | 5,156.33                     | 5.21%                        | \$3.02                     | 1.70%                         | 3.46%                      |
| 81                     | Plancorp                           | St. Louis, Mo.        | 5,067.86                     | 11.62%                       | \$3.72                     | 6.95%                         | 4.37%                      |
| 82                     | HBKS Wealth Advisors               | Erie, Pa.             | 5,053.26                     | 35.88%                       | \$0.91                     | 31.65%                        | 3.21%                      |
| 83                     | BJOIS                              | San Francisco, Calif. | 5,023.10                     | 8.55%                        | \$5.59                     | 11.93%                        | -3.02%                     |
| 84                     | Clarfeld Financial Advisors        | Tarrytown, N.Y.       | 5,018.04                     | 19.95%                       | \$6.10                     | 1.13%                         | 18.61%                     |
| 85                     | Modera Wealth Management           | Westwood, N.J.        | 4,957.47                     | 80.52%                       | \$2.60                     | 32.67%                        | 36.07%                     |
| 86                     | Bradley, Foster & Sargent          | Hartford, Conn.       | 4,879.42                     | 15.13%                       | \$3.20                     | 10.45%                        | 4.23%                      |
| 87                     | RGT Wealth Advisors                | Dallas, Texas         | 4,860.32                     | 12.11%                       | \$7.75                     | 2.99%                         | 8.85%                      |
| 88                     | The Caprock Group                  | Boise, Idaho          | 4,738.61                     | 30.36%                       | \$31.59                    | 14.72%                        | 13.64%                     |
| 89                     | GYL Financial Synergies            | West Hartford, Conn.  | 4,733.25                     | 11.05%                       | \$3.51                     | 10.48%                        | 0.52%                      |
| 90                     | Geller Advisors                    | New York, N.Y.        | 4,607.00                     | 29.39%                       | \$38.71                    | 4.38%                         | 23.96%                     |
| 91                     | TCG Advisory Services              | Austin, Texas         | 4,601.95                     | -27.36%                      | \$2.08                     | -41.64%                       | 24.46%                     |
| 92                     | Avantax Planning Partners          | Dubuque, Iowa         | 4,592.46                     | 12.91%                       | \$1.03                     | 12.10%                        | 0.72%                      |
| 93                     | Finaccess Advisors                 | Miami, Fla.           | 4,591.32                     | -2.55%                       | \$45.91                    | -18.14%                       | 19.05%                     |
| 94                     | Brightworth                        | Atlanta, Ga.          | 4,585.31                     | 13.66%                       | \$2.91                     | 7.02%                         | 6.20%                      |
| 95                     | SignatureFD                        | Atlanta, Ga.          | 4,578.00                     | 17.05%                       | \$3.29                     | 6.95%                         | 9.44%                      |
| 96                     | Retirement Planners of America     | Plano, Texas          | 4,472.59                     | -8.51%                       | \$0.52                     | -5.40%                        | -3.29%                     |
| 97                     | Bailard                            | Foster City, Calif.   | 4,419.85                     | 12.76%                       | \$5.46                     | 8.31%                         | 4.11%                      |
| 98                     | Pension Consultants                | Springfield, Mo.      | 4,383.80                     | 15.09%                       | \$38.45                    | 14.08%                        | 0.88%                      |
| 99                     | WMS Partners                       | Towson, Md.           | 4,368.46                     | 10.40%                       | \$10.25                    | -5.93%                        | 17.36%                     |
| 100                    | Edge Capital Group                 | Atlanta, Ga.          | 4,322.97                     | 6.21%                        | \$16.13                    | 2.25%                         | 3.88%                      |
| 101                    | Coldstream Wealth Management       | Bellevue, Wash.       | 4,322.47                     | 10.10%                       | \$2.85                     | 0.67%                         | 9.37%                      |

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| 102                    | Litman Gregory Asset Management           | Walnut Creek, Calif.  | 4,319.50                     | -2.72%                       | \$8.57                     | -5.42%                        | 2.86%                      |
| 103                    | Wipfli Financial Advisors                 | Milwaukee, Wis.       | 4,278.51                     | 18.23%                       | \$2.22                     | 17.01%                        | 1.05%                      |
| 104                    | Index Fund Advisors                       | Irvine, Calif.        | 4,132.88                     | 2.23%                        | \$1.76                     | 7.06%                         | -4.51%                     |
| 105                    | Carroll Financial Associates              | Charlotte, N.C.       | 4,085.36                     | 17.19%                       | \$0.73                     | 4.68%                         | 11.96%                     |
| 106                    | Fort Pitt Capital Group                   | Pittsburgh, Pa.       | 4,058.23                     | 14.92%                       | \$1.50                     | 12.79%                        | 1.89%                      |
| 107                    | Wilbanks, Smith & Thomas Asset Management | Norfolk, Va.          | 4,014.21                     | 14.44%                       | \$1.80                     | 0.06%                         | 14.38%                     |
| 108                    | Zhang Financial                           | Portage, Mich.        | 4,003.18                     | 24.41%                       | \$0.86                     | 16.55%                        | 6.75%                      |
| 109                    | Douglass Winthrop Advisors                | New York, N.Y.        | 4,002.15                     | 22.57%                       | \$3.82                     | 7.03%                         | 14.52%                     |
| 110                    | Crestwood Advisors Group                  | Boston, Mass.         | 3,963.02                     | 20.38%                       | \$4.77                     | 11.55%                        | 7.92%                      |
| 111                    | Ingalls & Snyder                          | New York, N.Y.        | 3,930.24                     | -0.94%                       | \$1.01                     | 5.17%                         | -5.81%                     |
| 112                    | Advisors Capital Management               | Ridgewood, N.J.       | 3,883.91                     | 21.51%                       | \$1.18                     | 10.34%                        | 10.12%                     |
| 113                    | Allegheny Financial Group                 | Pittsburgh, Pa.       | 3,879.48                     | 13.62%                       | \$0.99                     | 5.62%                         | 7.57%                      |
| 114                    | Truepoint Wealth Counsel                  | Cincinnati, Ohio      | 3,864.68                     | 14.44%                       | \$2.67                     | -16.61%                       | 37.23%                     |
| 115                    | Badgley Phelps Wealth Managers            | Seattle, Wash.        | 3,818.38                     | 19.49%                       | \$4.81                     | 8.05%                         | 10.58%                     |
| 116                    | Parallel Advisors                         | San Francisco, Calif. | 3,811.59                     | 20.29%                       | \$1.58                     | 11.15%                        | 8.22%                      |
| 117                    | Northeast Financial Consultants           | Westport, Conn.       | 3,811.07                     | 14.80%                       | \$16.36                    | 11.35%                        | 3.10%                      |
| 118                    | JMG Financial Group                       | Downers Grove, Ill.   | 3,788.00                     | 13.86%                       | \$3.28                     | 3.30%                         | 10.22%                     |
| 119                    | Annex Wealth Management                   | Elm Grove, Wis.       | 3,785.32                     | 46.00%                       | \$0.71                     | 26.99%                        | 14.97%                     |
| 120                    | Frontier Investment Management Company    | Dallas, Texas         | 3,770.43                     | 17.85%                       | \$1.75                     | -1.39%                        | 19.51%                     |
| 121                    | Camden Capital                            | El Segundo, Calif.    | 3,770.23                     | -8.73%                       | \$10.93                    | -9.79%                        | 1.17%                      |
| 122                    | Abacus Wealth Partners                    | Santa Monica, Calif.  | 3,750.00                     | 37.56%                       | \$2.25                     | 29.33%                        | 6.37%                      |
| 123                    | Mission Wealth Management                 | Santa Barbara, Calif. | 3,725.61                     | 44.64%                       | \$2.27                     | 8.62%                         | 33.17%                     |
| 124                    | Crescent Grove Advisors                   | Lake Forest, Ill.     | 3,695.57                     | 8.23%                        | \$13.49                    | 2.31%                         | 5.79%                      |
| 125                    | Cassaday & Company                        | McLean, Va.           | 3,682.69                     | 12.27%                       | \$1.31                     | -17.79%                       | 36.57%                     |
| 126                    | Covington Capital Management              | Los Angeles, Calif.   | 3,584.28                     | 40.19%                       | \$8.32                     | 59.38%                        | -12.04%                    |
| 127                    | Clifford Swan Investment Counselors       | Pasadena, Calif.      | 3,534.00                     | 8.60%                        | \$3.91                     | -5.47%                        | 14.89%                     |
| 128                    | Inverness Counsel                         | New York, N.Y.        | 3,528.61                     | -8.36%                       | \$7.52                     | -9.92%                        | 1.74%                      |
| 129                    | Kovack Advisors                           | Fort Lauderdale, Fla. | 3,518.59                     | 21.49%                       | \$0.41                     | 21.51%                        | -0.01%                     |
| 130                    | Prio Wealth                               | Boston, Mass.         | 3,516.71                     | 36.31%                       | \$5.24                     | 30.01%                        | 4.84%                      |
| 131                    | F.L.Putnam Investment Management Company  | Wellesley, Mass.      | 3,487.49                     | 25.21%                       | \$3.36                     | 9.06%                         | 14.81%                     |
| 132                    | Bordeaux Wealth Advisors                  | Menlo Park, Calif.    | 3,470.10                     | 52.47%                       | \$21.82                    | 21.78%                        | 25.20%                     |
| 133                    | Grimes & Company                          | Westborough, Mass.    | 3,459.68                     | 19.30%                       | \$1.21                     | 9.94%                         | 8.51%                      |
| 134                    | Advance Capital Management                | Southfield, Mich.     | 3,451.07                     | 16.77%                       | \$0.57                     | 11.72%                        | 4.52%                      |
| 135                    | Parsec Financial                          | Asheville, N.C.       | 3,427.81                     | 14.56%                       | \$1.87                     | 11.94%                        | 2.34%                      |
| 136                    | Mainstay Capital Management               | Grand Blanc, Mich.    | 3,419.80                     | 27.81%                       | \$0.92                     | 25.07%                        | 2.19%                      |
| 137                    | Berman Capital Advisors                   | Atlanta, Ga.          | 3,340.18                     | 22.83%                       | \$13.80                    | 5.07%                         | 16.91%                     |
| 138                    | Warren Averett Asset Management           | Birmingham, Ala.      | 3,291.01                     | 21.17%                       | \$2.57                     | 15.58%                        | 4.84%                      |
| 139                    | Cary Street Partners Investment Advisory  | Richmond, Va.         | 3,254.68                     | 67.69%                       | \$1.05                     | N/A                           | N/A                        |
| 140                    | Gradient Investments                      | Arden Hills, Minn.    | 3,237.74                     | 25.22%                       | \$0.21                     | 12.52%                        | 11.29%                     |
| 141                    | Destination Wealth Management             | Walnut Creek, Calif.  | 3,226.54                     | 17.23%                       | \$1.69                     | 10.35%                        | 6.24%                      |
| 142                    | Telemus Capital                           | Southfield, Mich.     | 3,197.31                     | 4.50%                        | \$1.99                     | -18.69%                       | 28.51%                     |
| 143                    | TCI Wealth Advisors                       | Tucson, Ariz.         | 3,182.07                     | 7.02%                        | \$1.36                     | 5.05%                         | 1.87%                      |
| 144                    | Westmount Asset Management                | Los Angeles, Calif.   | 3,118.54                     | 1.82%                        | \$2.36                     | 2.36%                         | -0.53%                     |
| 145                    | Crestone Capital                          | Boulder, Colo.        | 3,110.88                     | 5.46%                        | \$28.03                    | -6.89%                        | 13.27%                     |
| 146                    | Heritage Investors Management Corp.       | Bethesda, Md.         | 3,083.05                     | 10.43%                       | \$4.39                     | 11.37%                        | -0.85%                     |
| 147                    | Pure Financial Advisors                   | San Diego, Calif.     | 3,070.77                     | 17.57%                       | \$1.08                     | 1.63%                         | 15.69%                     |
| 148                    | Frontier Wealth Management                | Kansas City, Mo.      | 3,052.31                     | 24.93%                       | \$1.61                     | 7.38%                         | 16.35%                     |
| 149                    | CM Wealth Advisors                        | Beachwood, Ohio       | 3,036.99                     | 3.38%                        | \$17.86                    | 0.34%                         | 3.03%                      |
| 150                    | Matter Family Office                      | St. Louis, Mo.        | 3,026.00                     | 3.99%                        | \$16.36                    | 1.18%                         | 2.78%                      |
| 151                    | Budros, Ruhlin & Roe                      | Columbus, Ohio        | 3,019.51                     | 10.50%                       | \$3.80                     | 5.63%                         | 4.61%                      |
| 152                    | Hamilton Capital                          | Columbus, Ohio        | 2,911.02                     | 3.46%                        | \$1.23                     | -1.08%                        | 4.58%                      |

\*Discretionary and nondiscretionary AUM reported on Form ADV. \*\*Average assets per client relationship. †Transitioned to an independent RIA in 2020.

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# FA's 2021 RIA RANKING



RAYMOND JAMES

| 2020 TOTAL ASSETS RANK | FIRM NAME                                  | LOCATION                 | YEAR END 2020 ASSETS (\$MM)* | % GROWTH IN ASSETS 2019-2020 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|------------------------|--|--------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 153                    | Lake Street Advisors                       | Portsmouth, N.H.         | 2,910.53                     | 57.26%                       | \$52.92                    | 48.68%                        | 5.77%                      |
| 154                    | TFO-TDC                                    | Maumee, Ohio             | 2,899.44                     | 13.87%                       | \$2.06                     | 9.57%                         | 3.92%                      |
| 155                    | TFO Phoenix                                | Phoenix, Ariz.           | 2,891.34                     | -15.20%                      | \$17.42                    | -6.01%                        | -9.78%                     |
| 156                    | JFS Wealth Advisors                        | Hermitage, Pa.           | 2,805.31                     | 8.76%                        | \$1.33                     | 6.44%                         | 2.18%                      |
| 157                    | GM Advisory Group                          | Melville, N.Y.           | 2,804.04                     | 33.01%                       | \$5.48                     | 17.16%                        | 13.53%                     |
| 158                    | Palladium Registered Investment Advisors   | Norfolk, Va.             | 2,788.51                     | 10.12%                       | \$2.63                     | 4.21%                         | 5.67%                      |
| 159                    | Wellesley Asset Management                 | Wellesley, Mass.         | 2,786.28                     | 11.93%                       | \$1.68                     | 9.63%                         | 2.09%                      |
| 160                    | Coastal Bridge Advisors                    | Westport, Conn.          | 2,774.61                     | 32.19%                       | \$9.57                     | 28.09%                        | 3.20%                      |
| 161                    | HoyleCohen††                               | San Diego, Calif.        | 2,766.23                     | 42.85%                       | \$2.31                     | 39.28%                        | 2.56%                      |
| 162                    | Halbert Hargrove Global Advisors           | Long Beach, Calif.       | 2,762.89                     | 8.80%                        | \$4.05                     | 4.17%                         | 4.44%                      |
| 163                    | Klingman & Associates                      | New York, N.Y.           | 2,700.57                     | 27.09%                       | \$5.56                     | 14.54%                        | 10.96%                     |
| 164                    | Fairview Capital Investment Management     | Greenbrae, Calif.        | 2,678.92                     | 13.92%                       | \$13.39                    | 5.37%                         | 8.11%                      |
| 165                    | Chicago Capital                            | Chicago, Ill.            | 2,678.32                     | 31.04%                       | \$5.19                     | 17.83%                        | 11.21%                     |
| 166                    | Accredited Investors Wealth Management     | Edina, Minn.             | 2,675.83                     | 16.47%                       | \$4.87                     | 8.40%                         | 7.44%                      |
| 167                    | Family Management Corporation              | New York, N.Y.           | 2,627.20                     | 27.67%                       | \$3.89                     | 20.50%                        | 5.96%                      |
| 168                    | Capital Wealth Planning                    | Naples, Fla.             | 2,610.57                     | 46.41%                       | \$0.53                     | 7.27%                         | 36.49%                     |
| 169                    | Carlson Capital Management                 | Northfield, Minn.        | 2,596.42                     | 14.12%                       | \$2.32                     | 8.01%                         | 5.66%                      |
| 170                    | CG Advisory Services                       | Haslett, Mich.           | 2,584.05                     | 15.62%                       | \$0.27                     | -7.08%                        | 24.43%                     |
| 171                    | Sage Financial Group                       | Conshohocken, Pa.        | 2,557.40                     | 17.71%                       | \$3.79                     | 12.47%                        | 4.65%                      |
| 172                    | Barrett Asset Management                   | New York, N.Y.           | 2,516.31                     | 18.41%                       | \$2.69                     | -13.88%                       | 37.50%                     |
| 173                    | SJS Investment Services                    | Sylvania, Ohio           | 2,510.11                     | 14.11%                       | \$3.09                     | 6.95%                         | 6.69%                      |
| 174                    | Beaumont Financial Partners                | Needham, Mass.           | 2,452.73                     | 10.33%                       | \$4.91                     | 5.92%                         | 4.17%                      |
| 175                    | Wescott Financial Advisory Group           | Philadelphia, Pa.        | 2,440.47                     | 15.09%                       | \$4.73                     | 11.07%                        | 3.61%                      |
| 176                    | Private Ocean Wealth Management            | San Rafael, Calif.       | 2,439.11                     | 6.30%                        | \$2.45                     | 9.19%                         | -2.64%                     |
| 177                    | AGW Capital Advisors                       | Tampa, Fla.              | 2,426.25                     | 13.83%                       | \$24.26                    | 1.31%                         | 12.36%                     |
| 178                    | Evensky Katz                               | Coral Gables, Fla.       | 2,366.37                     | 12.89%                       | \$2.24                     | 3.81%                         | 8.74%                      |
| 179                    | True North Advisors                        | Dallas, Texas            | 2,338.10                     | 46.01%                       | \$4.00                     | 38.51%                        | 5.42%                      |
| 180                    | G.W. Hensler & Associates                  | Kennesaw, Ga.            | 2,337.12                     | 11.03%                       | \$1.85                     | -9.15%                        | 22.22%                     |
| 181                    | Radnor Financial Advisors                  | Wayne, Pa.               | 2,331.77                     | 24.62%                       | \$4.55                     | 10.77%                        | 12.50%                     |
| 182                    | Wealthcare Capital Management              | Richmond, Va.            | 2,314.46                     | 33.16%                       | \$0.58                     | 21.55%                        | 9.55%                      |
| 183                    | One Capital Management                     | Westlake Village, Calif. | 2,285.78                     | 42.15%                       | \$1.68                     | 4.60%                         | 35.90%                     |
| 184                    | Bragg Financial Advisors                   | Charlotte, N.C.          | 2,272.12                     | 27.97%                       | \$1.72                     | 16.71%                        | 9.65%                      |
| 185                    | Morton Capital Management                  | Calabasas, Calif.        | 2,210.88                     | 8.56%                        | \$2.19                     | 5.23%                         | 3.16%                      |
| 186                    | Greenwich Wealth Management                | Greenwich, Conn.         | 2,197.15                     | 49.95%                       | \$12.34                    | 37.32%                        | 9.20%                      |
| 187                    | Resource Consulting Group                  | Orlando, Fla.            | 2,193.42                     | 8.03%                        | \$4.63                     | 4.16%                         | 3.72%                      |
| 188                    | MCF Advisors                               | Covington, Ky.           | 2,168.28                     | 16.09%                       | \$3.02                     | -0.59%                        | 16.78%                     |
| 189                    | IFG Advisory                               | Atlanta, Ga.             | 2,159.83                     | 19.20%                       | \$0.34                     | -3.00%                        | 22.88%                     |
| 190                    | Chesley, Taft & Associates                 | Chicago, Ill.            | 2,146.05                     | 10.41%                       | \$5.96                     | 10.11%                        | 0.28%                      |
| 191                    | Retirement Income Solutions                | Ann Arbor, Mich.         | 2,130.78                     | 8.35%                        | \$1.77                     | 8.17%                         | 0.17%                      |
| 192                    | LaSalle St. Investment Advisors            | Elmhurst, Ill.           | 2,130.20                     | 22.53%                       | \$0.57                     | 11.40%                        | 9.99%                      |
| 193                    | Schneider Downs Wealth Management Advisors | Pittsburgh, Pa.          | 2,114.94                     | 16.34%                       | \$3.18                     | 8.29%                         | 7.43%                      |
| 194                    | Axxcess Wealth Management                  | Carlsbad, Calif.         | 2,096.68                     | 62.95%                       | \$0.33                     | -47.91%                       | 212.84%                    |
| 195                    | Covenant                                   | San Antonio, Texas       | 2,058.69                     | 13.48%                       | \$3.79                     | 5.33%                         | 7.74%                      |
| 196                    | Texas Yale Capital Corp                    | St Petersburg, Fla.      | 2,045.43                     | 6.95%                        | \$19.12                    | 5.95%                         | 0.94%                      |
| 197                    | Courier Capital                            | Buffalo, N.Y.            | 2,044.05                     | 7.09%                        | \$2.53                     | 5.37%                         | 1.64%                      |
| 198                    | AJ Wealth                                  | New York, N.Y.           | 2,037.00                     | 37.36%                       | \$8.45                     | 24.25%                        | 10.55%                     |
| 199                    | Altium Wealth Management                   | Purchase, N.Y.           | 2,027.00                     | 21.52%                       | \$2.31                     | 19.72%                        | 1.51%                      |
| 200                    | Smith Salley & Associates                  | Greensboro, N.C.         | 2,026.64                     | 19.82%                       | \$3.26                     | 9.20%                         | 9.72%                      |
| 201                    | RINET Company                              | Boston, Mass.            | 2,022.90                     | 3.99%                        | \$10.70                    | 2.34%                         | 1.61%                      |
| 202                    | Miracle Mile Advisors                      | Los Angeles, Calif.      | 2,012.82                     | 36.41%                       | \$2.90                     | 11.68%                        | 22.14%                     |
| 203                    | BakerAvenue Wealth Management              | San Francisco, Calif.    | 2,006.00                     | 12.32%                       | \$2.90                     | 10.20%                        | 1.92%                      |

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# FA's 2021 RIA RANKING



RAYMOND JAMES

| 2020 TOTAL ASSETS RANK | FIRM NAME                            | LOCATION                | YEAR END 2020 ASSETS (\$MM)* | % GROWTH IN ASSETS 2019-2020 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|------------------------|--------------------------------------|-------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 204                    | Constellation Wealth Advisors        | Cincinnati, Ohio        | 2,005.65                     | 35.88%                       | \$7.80                     | 11.56%                        | 21.80%                     |
| 205                    | The Portfolio Strategy Group         | White Plains, N.Y.      | 1,980.35                     | 7.67%                        | \$5.23                     | 4.54%                         | 2.99%                      |
| 206                    | Obermeyer Wood Investment Counsel    | Aspen, Colo.            | 1,965.00                     | 27.93%                       | \$3.57                     | 22.11%                        | 4.76%                      |
| 207                    | Summitry                             | Foster City, Calif.     | 1,958.10                     | 11.04%                       | \$1.73                     | 11.24%                        | -0.18%                     |
| 208                    | West Financial Services              | McLean, Va.             | 1,942.51                     | 13.15%                       | \$2.39                     | 9.40%                         | 3.43%                      |
| 209                    | Regal Investment Advisors            | Kentwood, Mich.         | 1,936.64                     | 32.28%                       | \$0.29                     | 30.92%                        | 1.04%                      |
| 210                    | The Welch Group                      | Birmingham, Ala.        | 1,910.59                     | 8.63%                        | \$1.73                     | -0.83%                        | 9.54%                      |
| 211                    | CoastEdge Partners                   | La Jolla, Calif.        | 1,901.93                     | 10.73%                       | \$18.47                    | -8.62%                        | 21.18%                     |
| 212                    | Beirne Wealth Consulting Services    | Shelton, Conn.          | 1,895.17                     | 7.45%                        | \$5.21                     | 14.53%                        | -6.19%                     |
| 213                    | RTD Financial Advisors               | Philadelphia, Pa.       | 1,877.02                     | 15.59%                       | \$3.01                     | 12.07%                        | 3.14%                      |
| 214                    | Farr Miller & Washington             | Washington, D.C.        | 1,872.20                     | 0.42%                        | \$3.08                     | -4.38%                        | 5.02%                      |
| 215                    | Reilly Financial Advisors            | La Mesa, Calif.         | 1,863.72                     | 2.98%                        | \$1.69                     | -8.72%                        | 12.82%                     |
| 216                    | 6 Meridian                           | Wichita, Kan.           | 1,854.14                     | 3.12%                        | \$2.81                     | -1.42%                        | 4.60%                      |
| 217                    | Fairway Wealth Management            | Independence, Ohio      | 1,847.01                     | 14.19%                       | \$7.39                     | 8.71%                         | 5.04%                      |
| 218                    | Capstone Financial Advisors          | Downers Grove, Ill.     | 1,836.63                     | 11.82%                       | \$3.47                     | 8.01%                         | 3.52%                      |
| 219                    | Heritage Financial Services          | Westwood, Mass.         | 1,825.00                     | 13.99%                       | \$1.87                     | 10.02%                        | 3.61%                      |
| 220                    | Magnus Financial Group               | New York, N.Y.          | 1,819.79                     | 15.27%                       | \$2.70                     | 4.51%                         | 10.29%                     |
| 221                    | McKinley Carter Wealth Services      | Wheeling, W.Va.         | 1,814.68                     | 42.62%                       | \$1.07                     | -20.36%                       | 79.07%                     |
| 222                    | Ritholtz Wealth Management           | New York, N.Y.          | 1,806.28                     | 39.09%                       | \$1.24                     | 6.27%                         | 30.88%                     |
| 223                    | Colorado Financial Management        | Boulder, Colo.          | 1,803.38                     | 14.36%                       | \$2.45                     | 10.15%                        | 3.81%                      |
| 224                    | Financial Advisory Service           | Leawood, Kan.           | 1,793.86                     | 26.28%                       | \$1.59                     | 7.76%                         | 17.19%                     |
| 225                    | Certified Financial Group            | Altamonte Springs, Fla. | 1,787.05                     | 18.26%                       | \$0.87                     | 11.81%                        | 5.77%                      |
| 226                    | Osborne Partners Capital Management  | San Francisco, Calif.   | 1,763.07                     | 8.00%                        | \$3.09                     | 3.84%                         | 4.01%                      |
| 227                    | Resource Management                  | Metairie, La.           | 1,750.00                     | 51.80%                       | \$3.18                     | 44.90%                        | 4.76%                      |
| 228                    | Vigilant Capital Management          | Portland, Maine         | 1,746.26                     | 25.73%                       | \$4.15                     | 11.40%                        | 12.87%                     |
| 229                    | Foundations Investment Advisors      | Phoenix, Ariz.          | 1,744.12                     | 69.67%                       | \$0.22                     | 8.24%                         | 56.75%                     |
| 230                    | Legacy Wealth Management             | Memphis, Tenn.          | 1,737.54                     | 16.79%                       | \$1.59                     | 16.79%                        | 0.00%                      |
| 231                    | Foster & Motley                      | Cincinnati, Ohio        | 1,727.15                     | 12.45%                       | \$2.51                     | 7.55%                         | 4.56%                      |
| 232                    | Artemis Wealth Advisors              | New York, N.Y.          | 1,722.63                     | 18.34%                       | \$114.84                   | 18.34%                        | 0.00%                      |
| 233                    | EFS Advisors                         | Cambridge, Minn.        | 1,720.09                     | 20.79%                       | \$0.10                     | 6.62%                         | 13.29%                     |
| 234                    | Biltmore Family Office               | Charlotte, N.C.         | 1,712.27                     | 32.33%                       | \$25.56                    | 8.63%                         | 21.82%                     |
| 235                    | Robertson Stephens Wealth Management | San Francisco, Calif.   | 1,707.54                     | 42.43%                       | \$4.94                     | 3.32%                         | 37.85%                     |
| 236                    | CFS Investment Advisory Services     | Totowa, N.J.            | 1,704.25                     | 16.69%                       | \$3.41                     | 10.85%                        | 5.26%                      |
| 237                    | CPS Investment Advisors              | Lakeland, Fla.          | 1,702.43                     | 16.58%                       | \$0.63                     | -0.08%                        | 16.67%                     |
| 238                    | BLB&B Advisors                       | Montgomeryville, Pa.    | 1,688.44                     | 18.78%                       | \$1.45                     | 10.11%                        | 7.88%                      |
| 239                    | Windsor Wealth Management            | Indianapolis, Ind.      | 1,680.16                     | 15.81%                       | \$1.83                     | 7.99%                         | 7.23%                      |
| 240                    | SFMG Wealth Advisors                 | Plano, Texas            | 1,668.45                     | 7.88%                        | \$2.75                     | 4.85%                         | 2.89%                      |
| 241                    | Glassman Wealth Services             | Vienna, Va.             | 1,662.30                     | 14.29%                       | \$5.50                     | 4.07%                         | 9.82%                      |
| 242                    | Apella Capital                       | Glastonbury, Conn.      | 1,662.00                     | 91.25%                       | \$0.83                     | 72.84%                        | 10.66%                     |
| 243                    | Capital Wealth Advisors              | Naples, Fla.            | 1,661.88                     | 6.16%                        | \$1.51                     | 5.10%                         | 1.01%                      |
| 244                    | Guyasuta Investment Advisors         | Pittsburgh, Pa.         | 1,634.88                     | 16.37%                       | \$4.30                     | 11.78%                        | 4.11%                      |
| 245                    | Krilogy                              | Creve Coeur, Mo.        | 1,617.06                     | 25.68%                       | \$0.87                     | 16.90%                        | 7.51%                      |
| 246                    | Strategic Financial Services         | Utica, N.Y.             | 1,582.08                     | 16.33%                       | \$1.50                     | 13.25%                        | 2.72%                      |
| 247                    | BerganKDV Wealth Management          | Bloomington, Minn.      | 1,563.30                     | 13.36%                       | \$1.84                     | 24.43%                        | -8.90%                     |
| 248                    | Stonebridge Capital Advisors         | Saint Paul, Minn.       | 1,544.77                     | 4.73%                        | \$1.29                     | -8.36%                        | 14.29%                     |
| 249                    | CapTrust Financial Advisors          | Holland, Mich.          | 1,517.45                     | 5.07%                        | \$1.92                     | 0.42%                         | 4.63%                      |
| 250                    | LBMC Investment Advisors             | Brentwood, Tenn.        | 1,516.62                     | 13.21%                       | \$3.41                     | 4.82%                         | 8.01%                      |
| 251                    | ProVise Management Group             | Clearwater, Fla.        | 1,515.64                     | 0.38%                        | \$1.17                     | -10.93%                       | 12.70%                     |
| 252                    | Pinnacle Wealth Planning Services    | Mansfield, Ohio         | 1,502.39                     | 10.31%                       | \$1.91                     | 3.31%                         | 6.78%                      |
| 253                    | Altfest Personal Wealth Management   | New York, N.Y.          | 1,500.25                     | 14.09%                       | \$2.36                     | 9.60%                         | 4.10%                      |
| 254                    | Prosperity Capital Advisors          | Westlake, Ohio          | 1,487.45                     | 21.57%                       | \$0.46                     | 16.85%                        | 4.03%                      |

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|------------------------|--|--------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 255                    | Ashfield Capital Partners                | San Francisco, Calif.    | 1,483.64                     | 22.73%                       | \$8.73                     | 19.12%                        | 3.03%                      |
| 256                    | Cabana Asset Management                  | Fayetteville, Ark.       | 1,481.53                     | 45.76%                       | \$0.20                     | 4.05%                         | 40.09%                     |
| 257                    | Sadoff Investment Management             | Milwaukee, Wis.          | 1,473.94                     | 0.93%                        | \$2.41                     | 5.39%                         | -4.23%                     |
| 258                    | Abacus Planning Group                    | Columbia, S.C.           | 1,452.69                     | 12.86%                       | \$5.12                     | -0.25%                        | 13.15%                     |
| 259                    | Frank, Rimerman Advisors                 | Palo Alto, Calif.        | 1,450.31                     | 3.73%                        | \$14.50                    | 3.73%                         | 0.00%                      |
| 260                    | Conservest Capital Advisors              | Wynnewood, Pa.           | 1,436.11                     | 32.73%                       | \$6.16                     | 28.74%                        | 3.10%                      |
| 261                    | Cornerstone Advisory                     | Hunt Valley, Md.         | 1,429.41                     | 7.16%                        | \$1.99                     | 18.47%                        | -9.55%                     |
| 262                    | Albion Financial Group                   | Salt Lake City, Utah     | 1,427.28                     | 19.26%                       | \$1.65                     | -0.87%                        | 20.31%                     |
| 263                    | Transform Wealth                         | Greenwood Village, Colo. | 1,400.90                     | 13.59%                       | \$0.82                     | -17.95%                       | 38.44%                     |
| 264                    | Ensemble Capital Management              | Burlingame, Calif.       | 1,399.26                     | 38.44%                       | \$5.71                     | 14.14%                        | 21.29%                     |
| 265                    | Polaris Wealth Advisory Group            | San Rafael, Calif.       | 1,392.90                     | 19.97%                       | \$1.16                     | 0.13%                         | 19.82%                     |
| 266                    | Main Street Research                     | Sausalito, Calif.        | 1,389.97                     | 32.37%                       | \$2.53                     | 68.47%                        | -21.43%                    |
| 267                    | Kings Point Capital Management           | Great Neck, N.Y.         | 1,370.44                     | 26.76%                       | \$5.50                     | 19.12%                        | 6.41%                      |
| 268                    | Condor Capital Wealth Management         | Martinsville, N.J.       | 1,350.92                     | 15.78%                       | \$1.88                     | 14.49%                        | 1.13%                      |
| 269                    | Investment Counsel Company               | Las Vegas, Nev.          | 1,350.89                     | 27.77%                       | \$5.61                     | 30.42%                        | -2.03%                     |
| 270                    | Wealthquest                              | Cincinnati, Ohio         | 1,348.24                     | 16.37%                       | \$1.03                     | 8.14%                         | 7.61%                      |
| 271                    | ML&R Wealth Management                   | Austin, Texas            | 1,336.62                     | 21.01%                       | \$2.44                     | 11.74%                        | 8.30%                      |
| 272                    | Bloom Advisors                           | Farmington Hills, Mich.  | 1,327.65                     | 11.37%                       | \$1.10                     | 12.39%                        | -0.91%                     |
| 273                    | Meyer Capital Group                      | Marlton, N.J.            | 1,326.36                     | 31.98%                       | \$1.77                     | 24.76%                        | 5.78%                      |
| 274                    | Inspire Investing                        | Hollister, Calif.        | 1,314.26                     | 107.10%                      | \$2.78                     | 105.35%                       | 0.85%                      |
| 275                    | Daintree Advisors                        | Boston, Mass.            | 1,311.91                     | 13.95%                       | \$4.93                     | 6.67%                         | 6.83%                      |
| 276                    | UMA Financial Services                   | Salt Lake City, Utah     | 1,310.30                     | 7.06%                        | \$1.31                     | 4.38%                         | 2.56%                      |
| 277                    | Van Hulzen Asset Management              | El Dorado Hills, Calif.  | 1,309.15                     | 18.99%                       | \$1.48                     | 14.02%                        | 4.35%                      |
| 278                    | Marcum Wealth                            | Cleveland, Ohio          | 1,292.45                     | 28.48%                       | \$0.80                     | 12.50%                        | 14.21%                     |
| 279                    | Durbin Bennett Private Wealth Management | Austin, Texas            | 1,285.83                     | 6.25%                        | \$4.40                     | -19.95%                       | 32.73%                     |
| 280                    | RZH Advisors                             | Stamford, Conn.          | 1,285.64                     | 30.68%                       | \$8.81                     | 21.73%                        | 7.35%                      |
| 281                    | Wright Investors' Service                | Shelton, Conn.           | 1,277.48                     | 3.09%                        | \$13.31                    | 12.75%                        | -8.57%                     |
| 282                    | XML Financial Group                      | Rockville, Md.           | 1,271.69                     | 16.49%                       | \$0.90                     | 8.68%                         | 7.18%                      |
| 283                    | Beard Harris Wealth Management           | Dallas, Texas            | 1,262.07                     | 8.04%                        | \$1.86                     | -2.94%                        | 11.31%                     |
| 284                    | Baltimore Washington Financial Advisors  | Columbia, Md.            | 1,250.00                     | 31.58%                       | \$1.92                     | 61.94%                        | -18.75%                    |
| 285                    | R W Investment Management                | Boise, Idaho             | 1,246.72                     | 87.80%                       | \$1.52                     | 9.28%                         | 71.85%                     |
| 286                    | United Asset Strategies                  | Garden City, N.Y.        | 1,227.60                     | 14.76%                       | \$1.15                     | -3.02%                        | 18.33%                     |
| 287                    | Novare Capital Management                | Charlotte, N.C.          | 1,224.69                     | 5.32%                        | \$3.21                     | -55.61%                       | 137.27%                    |
| 288                    | Maple Capital Management                 | Montpelier, Vt.          | 1,207.95                     | 17.19%                       | \$1.45                     | 9.85%                         | 6.68%                      |
| 289                    | TFC Financial Management                 | Boston, Mass.            | 1,206.83                     | 11.53%                       | \$3.38                     | 8.09%                         | 3.18%                      |
| 290                    | Diversified Portfolios                   | Bloomfield Hills, Mich.  | 1,203.10                     | 16.29%                       | \$2.31                     | 9.58%                         | 6.12%                      |
| 291                    | Acorn Financial Services                 | Reston, Va.              | 1,193.43                     | 24.74%                       | \$0.71                     | 13.23%                        | 10.17%                     |
| 292                    | Per Stirling Capital Management          | Austin, Texas            | 1,176.80                     | 24.93%                       | \$1.03                     | 14.58%                        | 9.03%                      |
| 293                    | Austin Asset                             | Austin, Texas            | 1,176.80                     | 13.19%                       | \$3.01                     | 10.58%                        | 2.36%                      |
| 294                    | Intersect Capital                        | San Ramon, Calif.        | 1,169.44                     | 20.01%                       | \$2.71                     | 16.67%                        | 2.86%                      |
| 295                    | Column Capital Advisors                  | Indianapolis, Ind.       | 1,161.75                     | 14.59%                       | \$3.34                     | 10.97%                        | 3.26%                      |
| 296                    | Nadler Financial Group                   | Deerfield, Ill.          | 1,158.20                     | 12.17%                       | \$1.46                     | 8.91%                         | 2.99%                      |
| 297                    | Sheaff Brock Investment Advisors         | Indianapolis, Ind.       | 1,150.92                     | 10.97%                       | \$1.10                     | 17.66%                        | -5.69%                     |
| 298                    | 3EDGE Asset Management                   | Boston, Mass.            | 1,149.79                     | 27.91%                       | \$2.78                     | -30.63%                       | 84.38%                     |
| 299                    | Bogart Wealth                            | McLean, Va.              | 1,138.82                     | 20.13%                       | \$1.48                     | -3.33%                        | 24.27%                     |
| 300                    | Narwhal Capital Management               | Marietta, Ga.            | 1,137.16                     | 19.44%                       | \$63.18                    | -0.46%                        | 20.00%                     |
| 301                    | Paragon Capital Management               | Denver, Colo.            | 1,115.93                     | 36.65%                       | \$7.49                     | 40.31%                        | -2.61%                     |
| 302                    | Valley National Financial Advisors       | Bethlehem, Pa.           | 1,105.56                     | 7.47%                        | \$0.51                     | 5.53%                         | 1.84%                      |
| 303                    | Edgemoor Investment Advisors             | Bethesda, Md.            | 1,101.52                     | 3.24%                        | \$2.88                     | 2.97%                         | 0.26%                      |
| 304                    | Romano Wealth Management                 | Evanston, Ill.           | 1,093.37                     | 11.68%                       | \$1.50                     | 4.16%                         | 7.23%                      |
| 305                    | SAX Wealth Advisors                      | Parsippany, N.J.         | 1,093.24                     | 8.89%                        | \$1.51                     | 8.44%                         | 0.42%                      |

\*Discretionary and nondiscretionary AUM reported on Form ADV. \*\*Average assets per client relationship. †Transitioned to an independent RIA in 2020.

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# FA's 2021 RIA RANKING



RAYMOND JAMES

| 2020 TOTAL ASSETS RANK                                   | FIRM NAME                                   | LOCATION                 | YEAR END 2020 ASSETS (\$MM)* | % GROWTH IN ASSETS 2019-2020 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|--|---|--------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 306  | SilverOak Wealth Management                 | Edina, Minn.             | 1,078.95                     | 13.50%                       | \$3.32                     | 8.61%                         | 4.50%                      |
| 307  | BT Wealth Management                        | Atlanta, Ga.             | 1,065.55                     | 3.88%                        | \$3.16                     | -3.52%                        | 7.67%                      |
| 308  | Azzad Asset Management                      | Falls Church, Va.        | 1,063.57                     | 30.91%                       | \$0.84                     | 13.36%                        | 15.48%                     |
| 309  | The Advisory Group of San Francisco         | San Francisco, Calif.    | 1,061.67                     | 29.69%                       | \$6.64                     | 32.93%                        | -2.44%                     |
| 310  | Bitterroot Capital Advisors                 | Bozeman, Mont.           | 1,060.50                     | 13.39%                       | \$70.70                    | 13.39%                        | 0.00%                      |
| 311  | Intelligence Driven Advisers                | Carlsbad, Calif.         | 1,060.38                     | 19.83%                       | \$1.06                     | 5.76%                         | 13.30%                     |
| 312  | Zuckerman Investment Group                  | Chicago, Ill.            | 1,048.35                     | 10.76%                       | \$3.49                     | 10.76%                        | 0.00%                      |
| 313  | Sather Financial Group                      | Victoria, Texas          | 1,048.18                     | 25.83%                       | \$2.47                     | 10.73%                        | 13.64%                     |
| 314  | Madison Wealth Management                   | Cincinnati, Ohio         | 1,040.84                     | 15.88%                       | \$2.12                     | 12.81%                        | 2.73%                      |
| 315  | Aveo Capital Partners                       | Greenwood Village, Colo. | 1,027.75                     | 55.72%                       | \$0.93                     | 40.74%                        | 10.64%                     |
| 316  | Avitas Wealth Management                    | Century City, Calif.     | 1,025.42                     | 20.06%                       | \$4.77                     | 10.57%                        | 8.59%                      |
| 317  | Telos Capital Management                    | San Diego, Calif.        | 1,017.49                     | 30.97%                       | \$1.36                     | 19.43%                        | 9.66%                      |
| 318  | BigSur Partners                             | Miami, Fla.              | 1,014.27                     | 0.66%                        | \$50.71                    | -4.37%                        | 5.26%                      |
| 319  | Palisade Asset Management                   | Minneapolis, Minn.       | 1,014.06                     | 8.89%                        | \$4.51                     | 143.91%                       | -55.36%                    |
| 320  | Weatherly Asset Management                  | Del Mar, Calif.          | 1,012.08                     | 15.59%                       | \$2.86                     | 13.96%                        | 1.43%                      |
| 321  | Smith Anglin Financial                      | Dallas, Texas            | 1,001.70                     | 22.76%                       | \$0.99                     | 7.06%                         | 14.67%                     |
| <b>ASSET CATEGORY: \$500 MILLION TO &lt; \$1 BILLION</b> |   |                          |                              |                              |                            |                               |                            |
| 322  | AlphaCore Capital                           | La Jolla, Calif.         | 998.27                       | 136.01%                      | \$1.31                     | 46.43%                        | 61.18%                     |
| 323  | Cardan Capital Partners                     | Denver, Colo.            | 992.50                       | 5.43%                        | \$2.65                     | 2.90%                         | 2.46%                      |
| 324  | Quadrant Private Wealth                     | Bethlehem, Pa.           | 991.91                       | 42.47%                       | \$1.57                     | -14.07%                       | 65.79%                     |
| 325  | TrinityPoint Wealth                         | Milford, Conn.           | 990.22                       | 18.28%                       | \$1.30                     | 9.92%                         | 7.61%                      |
| 326  | Professional Planning Group                 | Westerly, R.I.           | 971.75                       | 8.53%                        | \$0.56                     | 5.26%                         | 3.10%                      |
| 327  | Retirement Investment Advisors              | Oklahoma City, Okla.     | 959.96                       | 17.67%                       | \$0.77                     | 15.30%                        | 2.05%                      |
| 328  | Woodmont Investment Counsel                 | Nashville, Tenn.         | 958.60                       | 13.98%                       | \$3.20                     | 37.54%                        | -17.13%                    |
| 329  | Richard P. Slaughter Associates             | Austin, Texas            | 955.45                       | 26.11%                       | \$2.25                     | 18.69%                        | 6.25%                      |
| 330  | SPC Financial                               | Rockville, Md.           | 955.13                       | 20.89%                       | \$0.85                     | 10.42%                        | 9.48%                      |
| 331  | Rollins Financial                           | Atlanta, Ga.             | 953.82                       | 41.38%                       | \$1.07                     | 31.24%                        | 7.72%                      |
| 332  | BFSG  | Irvine, Calif.           | 950.89                       | 11.33%                       | \$1.20                     | 4.86%                         | 6.17%                      |
| 333  | Cahaba Wealth Management                    | Atlanta, Ga.             | 949.97                       | 22.85%                       | \$1.67                     | -5.05%                        | 29.38%                     |
| 334  | PDS Planning                                | Dublin, Ohio             | 941.73                       | 38.04%                       | \$1.60                     | 27.95%                        | 7.89%                      |
| 335  | CJM Wealth Advisers                         | Fairfax, Va.             | 941.62                       | 5.15%                        | \$1.30                     | 15.18%                        | -8.70%                     |
| 336  | Traphagen Investment Advisors               | Oradell, N.J.            | 922.27                       | 17.58%                       | \$0.65                     | 7.50%                         | 9.37%                      |
| 337  | Diversified Lifelong Advisors               | Wilmington, Del.         | 914.78                       | 80.10%                       | \$0.92                     | 24.60%                        | 44.54%                     |
| 338  | Delta Financial Group                       | Basking Ridge, N.J.      | 911.50                       | 21.33%                       | \$1.29                     | 11.02%                        | 9.29%                      |
| 339  | Allegiant Private Advisors†                 | Sarasota, Fla.           | 911.10                       | N/A                          | \$1.92                     | N/A                           | N/A                        |
| 340  | Burton Enright Welch                        | Walnut Creek, Calif.     | 904.84                       | 20.42%                       | \$2.10                     | 13.42%                        | 6.17%                      |
| 341  | Delegate Advisors                           | Chapel Hill, N.C.        | 903.33                       | 11.37%                       | \$29.14                    | 4.18%                         | 6.90%                      |
| 342  | Segment Wealth Management                   | Houston, Texas           | 902.83                       | 17.46%                       | \$4.65                     | 12.61%                        | 4.30%                      |
| 343  | Mayflower Advisors†                         | Boston, Mass.            | 901.62                       | N/A                          | \$0.84                     | N/A                           | N/A                        |
| 344  | Kowal Investment Group                      | Waukesha, Wis.           | 900.00                       | 12.50%                       | \$0.82                     | 2.27%                         | 10.00%                     |
| 345  | Agili                                       | Richmond, Va.            | 884.59                       | 16.29%                       | \$2.82                     | 12.59%                        | 3.29%                      |
| 346  | Apriem Advisors                             | Irvine, Calif.           | 875.93                       | 15.22%                       | \$1.32                     | 11.57%                        | 3.28%                      |
| 347  | Financial Planning and Information Services | De Pere, Wis.            | 874.39                       | 13.34%                       | \$0.85                     | 10.79%                        | 2.30%                      |
| 348  | Patton, Albertson, Miller Group             | Chattanooga, Tenn.       | 871.48                       | 6.06%                        | \$1.87                     | 3.56%                         | 2.41%                      |
| 349  | Beacon Financial Group                      | Dallas, Texas            | 865.00                       | 8.40%                        | \$1.11                     | 5.48%                         | 2.76%                      |
| 350  | Blue Chip Partners                          | Farmington Hills, Mich.  | 862.03                       | 12.26%                       | \$1.64                     | 2.04%                         | 10.02%                     |
| 351  | Petersen Hastings Investment Management     | Kennewick, Wash.         | 838.01                       | 8.85%                        | \$1.09                     | 2.07%                         | 6.65%                      |
| 352  | Soundmark Wealth Management                 | Kirkland, Wash.          | 831.67                       | 7.84%                        | \$1.62                     | 5.32%                         | 2.40%                      |
| 353  | Stepp & Rothwell                            | Overland Park, Kan.      | 831.56                       | 20.01%                       | \$3.08                     | 16.90%                        | 2.66%                      |
| 354  | Titleist Asset Management                   | San Antonio, Texas       | 831.19                       | 54.79%                       | \$0.81                     | 31.64%                        | 17.59%                     |
| 355  | Red Door Wealth Management                  | Memphis, Tenn.           | 824.32                       | 28.40%                       | \$1.94                     | 18.71%                        | 8.16%                      |

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# FA's 2021 RIA RANKING



RAYMOND JAMES

| 2020 TOTAL ASSETS RANK | FIRM NAME                                  | LOCATION                 | YEAR END 2020 ASSETS (\$MM)* | % GROWTH IN ASSETS 2019-2020 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|------------------------|--|--------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 356                    | REDW Wealth                                | Albuquerque, N.M.        | 822.83                       | 9.16%                        | \$2.29                     | 8.25%                         | 0.84%                      |
| 357                    | Fusion Family Wealth                       | Woodbury, N.Y.           | 818.00                       | 21.01%                       | \$3.00                     | 12.58%                        | 7.48%                      |
| 358                    | Woodard & Company Asset Management Group   | Bermuda Run, N.C.        | 813.80                       | 13.45%                       | \$0.54                     | 39.93%                        | -18.92%                    |
| 359                    | Archford                                   | Swansea, Ill.            | 810.35                       | 23.28%                       | \$1.41                     | 31.63%                        | -6.34%                     |
| 360                    | Seasons of Advice Wealth Management        | New York, N.Y.           | 805.21                       | 21.65%                       | \$1.09                     | 18.68%                        | 2.50%                      |
| 361                    | Medley & Brown                             | Ridgeland, Miss.         | 803.32                       | 2.10%                        | \$1.54                     | 1.51%                         | 0.58%                      |
| 362                    | Triad Financial Advisors                   | Greensboro, N.C.         | 802.32                       | 11.38%                       | \$1.14                     | 8.21%                         | 2.94%                      |
| 363                    | Investment Security Group                  | Denver, Colo.            | 800.00                       | 7.96%                        | \$1.07                     | 0.76%                         | 7.14%                      |
| 364                    | Versant Capital Management                 | Phoenix, Ariz.           | 796.43                       | 3.08%                        | \$1.80                     | 0.75%                         | 2.31%                      |
| 365                    | DiNuzzo Private Wealth                     | Beaver, Pa.              | 795.00                       | 1.89%                        | \$1.04                     | 0.56%                         | 1.32%                      |
| 366                    | Steigerwald, Gordon & Koch Wealth Advisors | Leesburg, Va.            | 790.00                       | 9.12%                        | \$1.65                     | 9.12%                         | 0.00%                      |
| 367                    | Janiczek Wealth Management                 | Denver, Colo.            | 780.15                       | 15.56%                       | \$5.78                     | 7.00%                         | 8.00%                      |
| 368                    | Vintage Financial Services                 | Ann Arbor, Mich.         | 779.24                       | 11.91%                       | \$1.50                     | 10.83%                        | 0.97%                      |
| 369                    | HCM Wealth Advisors                        | Cincinnati, Ohio         | 767.90                       | 8.47%                        | \$1.11                     | 10.83%                        | -2.13%                     |
| 370                    | New England Investment & Retirement Group  | North Andover, Mass.     | 765.98                       | 16.94%                       | \$1.01                     | 13.25%                        | 3.26%                      |
| 371                    | Aufman Associates                          | Sewickley, Pa.           | 764.08                       | 5.66%                        | \$3.47                     | 3.26%                         | 2.33%                      |
| 372                    | Hemington Wealth Management                | Falls Church, Va.        | 755.90                       | -14.66%                      | \$1.94                     | 0.22%                         | -14.85%                    |
| 373                    | Marshall Financial Group                   | Doylestown, Pa.          | 747.72                       | 12.05%                       | \$1.62                     | 12.05%                        | 0.00%                      |
| 374                    | Moisand Fitzgerald Tamayo                  | Orlando, Fla.            | 742.76                       | 14.20%                       | \$1.21                     | 9.72%                         | 4.08%                      |
| 375                    | Financial Advisory Corporation             | Grand Rapids, Mich.      | 731.26                       | 7.79%                        | \$3.48                     | -4.53%                        | 12.90%                     |
| 376                    | WPWealth                                   | Fort Worth, Texas        | 726.01                       | 16.87%                       | \$1.79                     | 5.61%                         | 10.66%                     |
| 377                    | Blankinship & Foster                       | Solana Beach, Calif.     | 722.23                       | 19.88%                       | \$2.44                     | 6.11%                         | 12.98%                     |
| 378                    | Yeske Buie                                 | San Francisco, Calif.    | 722.11                       | -2.89%                       | \$2.77                     | -1.41%                        | -1.51%                     |
| 379                    | Willis Johnson & Associates                | Houston, Texas           | 721.94                       | 19.26%                       | \$2.17                     | 20.34%                        | -0.89%                     |
| 380                    | Stage Harbor Financial                     | Needham, Mass.           | 718.20                       | 13.74%                       | \$3.01                     | 3.27%                         | 10.14%                     |
| 381                    | Deerfield                                  | Indianapolis, Ind.       | 715.77                       | 2.64%                        | \$2.50                     | 10.90%                        | -7.44%                     |
| 382                    | Southern Financial Group                   | Birmingham, Ala.         | 705.41                       | 11.67%                       | \$0.56                     | 1.43%                         | 10.09%                     |
| 383                    | Investec Wealth Strategies                 | Houston, Texas           | 700.57                       | 17.19%                       | \$2.36                     | 13.64%                        | 3.13%                      |
| 384                    | Virtue Capital Management                  | Brentwood, Tenn.         | 700.32                       | 32.32%                       | \$0.11                     | 14.67%                        | 15.39%                     |
| 385                    | WorthPointe                                | San Diego, Calif.        | 690.91                       | 10.75%                       | \$1.36                     | 1.17%                         | 9.46%                      |
| 386                    | Halpern Financial                          | Ashburn, Va.             | 686.84                       | 23.84%                       | \$2.54                     | 13.29%                        | 9.31%                      |
| 387                    | Regatta Capital Group                      | El Segundo, Calif.       | 682.41                       | 40.09%                       | \$0.85                     | 18.20%                        | 18.52%                     |
| 388                    | Nelson Capital Management                  | Menlo Park, Calif.       | 680.00                       | -13.04%                      | \$5.23                     | 0.33%                         | -13.33%                    |
| 389                    | Ruggie Wealth Management                   | Tavares, Fla.            | 679.00                       | 9.93%                        | \$0.85                     | 4.42%                         | 5.28%                      |
| 390                    | Briaud Financial Advisors                  | College Station, Texas   | 672.51                       | 13.26%                       | \$2.51                     | 9.88%                         | 3.08%                      |
| 391                    | The Wealth Collaborative                   | Westlake Village, Calif. | 671.35                       | 20.84%                       | \$3.63                     | 17.57%                        | 2.78%                      |
| 392                    | William Mack & Associates                  | Troy, Mich.              | 664.80                       | 15.94%                       | \$0.90                     | 12.34%                        | 3.20%                      |
| 393                    | Financial Partners Capital Management      | New York, N.Y.           | 654.02                       | 16.16%                       | \$2.32                     | 11.22%                        | 4.44%                      |
| 394                    | PJ Schmidt Investment Management           | Cedarburg, Wis.          | 652.45                       | 8.90%                        | \$1.61                     | 56.49%                        | -30.41%                    |
| 395                    | StrategicPoint Investment Advisors         | Providence, R.I.         | 648.31                       | 5.97%                        | \$1.01                     | 5.80%                         | 0.16%                      |
| 396                    | CapSouth Wealth Management                 | Dothan, Ala.             | 643.62                       | 13.15%                       | \$1.64                     | 2.78%                         | 10.08%                     |
| 397                    | Total Wealth Planning                      | Cincinnati, Ohio         | 641.13                       | 14.72%                       | \$1.61                     | 7.52%                         | 6.70%                      |
| 398                    | Cypress Point Wealth Management            | Dallas, Texas            | 629.66                       | -8.64%                       | \$4.43                     | 11.30%                        | -17.92%                    |
| 399                    | Canal Capital Management                   | Richmond, Va.            | 628.75                       | 32.04%                       | \$1.59                     | 19.34%                        | 10.64%                     |
| 400                    | Sensible Financial Planning and Management | Waltham, Mass.           | 616.46                       | 15.06%                       | \$2.22                     | 10.92%                        | 3.73%                      |
| 401                    | Omega Wealth Partners                      | Fort Worth, Texas        | 616.00                       | 16.89%                       | \$2.05                     | 7.15%                         | 9.09%                      |
| 402                    | Omnia Family Wealth                        | Aventura, Fla.           | 610.52                       | 4.60%                        | \$8.98                     | 4.60%                         | 0.00%                      |
| 403                    | Berkshire Money Management                 | Dalton, Mass.            | 609.00                       | 29.32%                       | \$0.98                     | 21.38%                        | 6.54%                      |
| 404                    | Klaas Financial                            | Loves Park, Ill.         | 605.00                       | 32.39%                       | \$0.58                     | 45.51%                        | -9.02%                     |
| 405                    | Optas Capital                              | San Francisco, Calif.    | 598.56                       | 14.51%                       | \$5.25                     | -8.59%                        | 25.27%                     |
| 406                    | Asset Management Group                     | Stamford, Conn.          | 595.96                       | 19.54%                       | \$2.27                     | 18.63%                        | 0.77%                      |

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# FA's 2021 RIA RANKING



RAYMOND JAMES

| 2020 TOTAL ASSETS RANK                                    | FIRM NAME                          | LOCATION                | YEAR END 2020 ASSETS (\$MM)* | % GROWTH IN ASSETS 2019-2020 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|---|------------------------------------|-------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 407   | Droms Strauss Wealth Management    | St. Louis, Mo.          | 591.24                       | 12.89%                       | \$1.70                     | 7.36%                         | 5.15%                      |
| 408   | Claro Advisors                     | Boston, Mass.           | 588.34                       | 32.63%                       | \$0.94                     | 10.81%                        | 19.69%                     |
| 409   | Socius Family Office               | Fort Lauderdale, Fla.   | 584.17                       | 7.54%                        | \$3.95                     | 6.09%                         | 1.37%                      |
| 410   | J.P. King Advisors                 | Walnut Creek, Calif.    | 575.90                       | 12.61%                       | \$1.59                     | 11.37%                        | 1.12%                      |
| 411   | The Arkansas Financial Group       | Little Rock, Ark.       | 573.51                       | 8.95%                        | \$1.84                     | 8.25%                         | 0.65%                      |
| 412   | Summit Wealth Partners             | Orlando, Fla.           | 571.04                       | 18.72%                       | \$0.78                     | -22.57%                       | 53.33%                     |
| 413   | KMH Wealth Management              | Victoria, Texas         | 569.26                       | 11.93%                       | \$1.19                     | 7.24%                         | 4.37%                      |
| 414   | Insight Wealth Partners            | Plano, Texas            | 569.03                       | 30.63%                       | \$0.84                     | 19.99%                        | 8.87%                      |
| 415   | Frisch Financial Group             | Melville, N.Y.          | 564.93                       | 17.47%                       | \$1.20                     | 14.97%                        | 2.17%                      |
| 416   | BlueSky Wealth Advisors            | New Bern, N.C.          | 560.78                       | 23.47%                       | \$1.75                     | 13.83%                        | 8.47%                      |
| 417   | W.A. Smith Financial Group         | Sheffield Village, Ohio | 541.77                       | 32.07%                       | \$0.34                     | -7.46%                        | 42.72%                     |
| 418   | Investmark Advisory Group          | Shelton, Conn.          | 541.68                       | 17.95%                       | \$0.98                     | 16.67%                        | 1.09%                      |
| 419   | The L. Warner Companies            | Timonium, Md.           | 538.75                       | 9.04%                        | \$1.99                     | 11.45%                        | -2.17%                     |
| 420   | Peavine Capital                    | Reno, Nev.              | 538.00                       | 53.71%                       | \$23.39                    | 153.96%                       | -39.47%                    |
| 421   | Mirador Capital Partners           | Pleasanton, Calif.      | 536.00                       | 46.45%                       | \$1.07                     | 34.73%                        | 8.70%                      |
| 422   | Bernhardt Wealth Management        | McLean, Va.             | 534.28                       | 8.98%                        | \$1.92                     | 18.00%                        | -7.64%                     |
| 423   | Greystone Financial Group          | Bloomfield Hills, Mich. | 528.27                       | -11.82%                      | \$0.85                     | -7.73%                        | -4.44%                     |
| 424   | Financial Management Strategies    | Broadview Heights, Ohio | 525.16                       | 17.34%                       | \$0.36                     | 7.72%                         | 8.93%                      |
| 425   | Excalibur Management Corp.         | Newton, Mass.           | 519.00                       | 6.96%                        | \$1.84                     | 7.72%                         | -0.70%                     |
| 426   | Porter White Investment Advisors   | Birmingham, Ala.        | 517.21                       | 6.79%                        | \$4.83                     | 6.79%                         | 0.00%                      |
| 427   | Tobias Financial Advisors          | Plantation, Fla.        | 513.00                       | 19.58%                       | \$2.00                     | 6.09%                         | 12.72%                     |
| 428   | Frazier Financial Advisors         | Dublin, Ohio            | 510.00                       | 41.67%                       | \$1.52                     | 31.09%                        | 8.06%                      |
| 429   | Birchwood Financial Partners       | Edina, Minn.            | 506.94                       | 13.59%                       | \$1.32                     | 14.18%                        | -0.52%                     |
| 430   | FMA Advisory                       | Harrisburg, Pa.         | 505.00                       | 13.48%                       | \$0.84                     | 8.75%                         | 4.35%                      |
| 431   | Abound Wealth Management           | Franklin, Tenn.         | 501.39                       | 50.09%                       | \$1.44                     | 15.48%                        | 29.96%                     |
| 432   | McIlrath & Eck                     | Arlington, Wash.        | 501.04                       | 26.14%                       | \$0.50                     | 20.49%                        | 4.69%                      |
| 433   | Elser Financial Planning           | Indianapolis, Ind.      | 500.34                       | 15.90%                       | \$2.00                     | 4.31%                         | 11.11%                     |
| <b>ASSET CATEGORY: \$250 MILLION TO &lt;\$500 MILLION</b> |                                    |                         |                              |                              |                            |                               |                            |
| 434   | Net Worth Advisory Group           | Sandy, Utah             | 498.88                       | 21.56%                       | \$1.06                     | 11.99%                        | 8.55%                      |
| 435   | Optima Asset Management            | Dallas, Texas           | 490.13                       | 2.34%                        | \$5.00                     | 0.25%                         | 2.08%                      |
| 436   | The Gleason Group                  | Prospect, Ky.           | 489.28                       | 36.01%                       | \$2.08                     | 32.54%                        | 2.62%                      |
| 437   | Goodman Financial Corporation      | Houston, Texas          | 488.18                       | 8.91%                        | \$2.21                     | 13.84%                        | -4.33%                     |
| 438   | Grand Wealth Management            | Grand Rapids, Mich.     | 487.51                       | 20.61%                       | \$3.11                     | 9.09%                         | 10.56%                     |
| 439   | Buckley Wealth Management          | Las Vegas, Nev.         | 484.64                       | 4.60%                        | \$2.09                     | -4.41%                        | 9.43%                      |
| 440   | Sovereign Financial Group          | Stamford, Conn.         | 482.67                       | 117.50%                      | \$0.60                     | -24.06%                       | 186.43%                    |
| 441   | Marotta Wealth Management          | Charlottesville, Va.    | 470.74                       | 6.35%                        | \$1.31                     | -11.17%                       | 19.73%                     |
| 442   | PARAGON Wealth Strategies          | Jacksonville, Fla.      | 467.69                       | 89.79%                       | \$1.30                     | 44.57%                        | 31.27%                     |
| 443   | Three Bridge Wealth Advisors       | Portola Valley, Calif.  | 467.45                       | 4.99%                        | \$5.03                     | 3.86%                         | 1.09%                      |
| 444   | Spectrum Investment Advisors       | Mequon, Wis.            | 461.22                       | 26.87%                       | \$1.47                     | 18.38%                        | 7.17%                      |
| 445   | Next Generation Wealth Management  | Milwaukee, Wis.         | 459.32                       | 32.49%                       | \$1.55                     | 36.52%                        | -2.95%                     |
| 446   | J.W. Coons Advisors                | Columbus, Ohio          | 455.96                       | 7.06%                        | \$3.02                     | 9.18%                         | -1.95%                     |
| 447   | Jentner Wealth Management          | Akron, Ohio             | 452.40                       | 12.76%                       | \$1.55                     | 11.60%                        | 1.04%                      |
| 448   | Hopwood Financial Services         | Reston, Va.             | 451.86                       | 17.64%                       | \$1.84                     | 11.42%                        | 5.58%                      |
| 449   | Hochman Cole Financial Services    | Deerfield, Ill.         | 442.54                       | 13.83%                       | \$2.01                     | 6.59%                         | 6.80%                      |
| 450   | Wealth Care                        | Merritt Island, Fla.    | 440.11                       | 21.24%                       | \$2.70                     | 13.80%                        | 6.54%                      |
| 451   | Oarsman Capital                    | Milwaukee, Wis.         | 435.57                       | -16.32%                      | \$0.92                     | 31.25%                        | -36.24%                    |
| 452   | von Borstel & Associates†          | The Dalles, Ore.        | 432.64                       | -2.86%                       | \$1.01                     | 1.89%                         | -4.67%                     |
| 453   | Meritas Wealth Management          | Larkspur, Calif.        | 425.11                       | 16.07%                       | \$1.85                     | 1.44%                         | 14.43%                     |
| 454   | Gradient Capital Advisors          | San Diego, Calif.       | 420.91                       | 14.94%                       | \$0.99                     | 11.96%                        | 2.66%                      |
| 455   | Duncan Williams Asset Management   | Memphis, Tenn.          | 409.72                       | 200.47%                      | \$1.04                     | 119.64%                       | 36.81%                     |
| 456   | Jackson, Grant Investment Advisors | Stamford, Conn.         | 406.56                       | 11.86%                       | \$4.15                     | 14.15%                        | -2.00%                     |

\*Discretionary and nondiscretionary AUM reported on Form ADV. \*\*Average assets per client relationship. †Transitioned to an independent RIA in 2020.

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# FA's 2021 RIA RANKING



RAYMOND JAMES

| 2020 TOTAL ASSETS RANK | FIRM NAME                              | LOCATION                 | YEAR END 2020 ASSETS (\$MM)* | % GROWTH IN ASSETS 2019-2020 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|------------------------|--|--------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 457                    | Fiduciary Wealth Management            | Reston, Va.              | 402.58                       | 38.99%                       | \$0.92                     | 18.32%                        | 17.47%                     |
| 458                    | Stordahl Capital Management            | Greenwood Village, Colo. | 394.81                       | 11.08%                       | \$1.61                     | 6.55%                         | 4.26%                      |
| 459                    | Century Wealth Management              | Memphis, Tenn.           | 392.44                       | 9.55%                        | \$4.56                     | 4.45%                         | 4.88%                      |
| 460                    | WJ Interests                           | Sugar Land, Texas        | 390.00                       | 11.75%                       | \$1.80                     | 6.60%                         | 4.83%                      |
| 461                    | Pinnacle Financial Group               | Western Springs, Ill.    | 385.78                       | 11.83%                       | \$1.21                     | 8.68%                         | 2.89%                      |
| 462                    | Shorepoint Capital Partners            | Norwood, Mass.           | 382.66                       | 5.76%                        | \$1.60                     | 5.32%                         | 0.42%                      |
| 463                    | The Goff Financial Group               | Houston, Texas           | 382.21                       | 8.04%                        | \$2.22                     | 8.04%                         | 0.00%                      |
| 464                    | Court Place Advisors                   | Ellicott City, Md.       | 381.76                       | 6.52%                        | \$1.15                     | 5.88%                         | 0.61%                      |
| 465                    | Balboa Wealth Partners                 | Newport Beach, Calif.    | 381.00                       | 86.86%                       | \$0.97                     | 19.47%                        | 56.40%                     |
| 466                    | Asset Planning                         | Cypress, Calif.          | 377.16                       | 15.93%                       | \$1.20                     | 10.76%                        | 4.67%                      |
| 467                    | Resolute Financial                     | Newburyport, Mass.       | 374.75                       | 9.19%                        | \$1.17                     | 16.02%                        | -5.88%                     |
| 468                    | Rainey & Randall Investment Management | Celebration, Fla.        | 371.38                       | 15.07%                       | \$2.40                     | 3.93%                         | 10.71%                     |
| 469                    | Clune & Associates                     | Chicago, Ill.            | 369.40                       | 9.29%                        | \$2.05                     | 3.22%                         | 5.88%                      |
| 470                    | Heritage Way Advisors                  | Rockford, Ill.           | 368.49                       | 23.56%                       | \$2.18                     | 13.32%                        | 9.03%                      |
| 471                    | Perspective Wealth Partners            | Boise, Idaho             | 367.37                       | 19.72%                       | \$2.11                     | 14.21%                        | 4.82%                      |
| 472                    | QP Consulting                          | Takoma Park, Md.         | 363.81                       | 20.26%                       | \$5.96                     | 0.55%                         | 19.61%                     |
| 473                    | Apex Financial Advisors                | Yardley, Pa.             | 363.81                       | 16.73%                       | \$2.43                     | 8.17%                         | 7.91%                      |
| 474                    | Mark Sheptoff Financial Planning       | Glastonbury, Conn.       | 363.00                       | 0.55%                        | \$1.05                     | 0.55%                         | 0.00%                      |
| 475                    | Day & Ennis                            | Macon, Ga.               | 361.09                       | 15.36%                       | \$1.71                     | 9.34%                         | 5.50%                      |
| 476                    | Altrius Capital Management             | New Bern, N.C.           | 361.00                       | 6.18%                        | \$0.86                     | 1.12%                         | 5.00%                      |
| 477                    | Cassady Schiller Wealth Management     | Cincinnati, Ohio         | 360.81                       | 16.33%                       | \$1.41                     | 9.95%                         | 5.81%                      |
| 478                    | Wisey Asset Management                 | San Diego, Calif.        | 360.27                       | 20.40%                       | \$0.56                     | -0.04%                        | 20.45%                     |
| 479                    | Morling Financial Advisors             | Fremont, Calif.          | 359.54                       | 31.79%                       | \$2.19                     | 101.70%                       | -34.66%                    |
| 480                    | Arbor Wealth Management                | Miramar Beach, Fla.      | 359.09                       | 14.19%                       | \$1.05                     | 10.53%                        | 3.31%                      |
| 481                    | Winch Financial                        | Appleton, Wis.           | 358.92                       | 7.22%                        | \$0.45                     | 6.82%                         | 0.38%                      |
| 482                    | Reston Wealth Management               | Reston, Va.              | 358.87                       | 10.92%                       | \$0.79                     | 10.43%                        | 0.44%                      |
| 483                    | Burkett Financial Services             | Rock Hill, S.C.          | 350.12                       | 14.03%                       | \$0.96                     | 10.89%                        | 2.82%                      |
| 484                    | Wechter Feldman Wealth Management      | Parsippany, N.J.         | 349.77                       | 7.50%                        | \$2.21                     | 4.77%                         | 2.60%                      |
| 485                    | Transitions Wealth Management          | Denver, Colo.            | 348.31                       | 14.79%                       | \$0.96                     | 12.56%                        | 1.98%                      |
| 486                    | Asset Advisory Group                   | Kinnelon, N.J.           | 346.94                       | 13.29%                       | \$2.21                     | 8.24%                         | 4.67%                      |
| 487                    | ARQ Wealth Advisors                    | Scottsdale, Ariz.        | 342.00                       | 26.09%                       | \$1.36                     | 9.58%                         | 15.07%                     |
| 488                    | Alpha Financial Advisors               | Charlotte, N.C.          | 341.59                       | 18.92%                       | \$1.52                     | 11.49%                        | 6.67%                      |
| 489                    | Allodium Investment Consultants        | Minneapolis, Minn.       | 340.14                       | 8.70%                        | \$1.55                     | 7.71%                         | 0.92%                      |
| 490                    | F13 Financial Advisors                 | Carmel, Ind.             | 336.85                       | 18.78%                       | \$3.44                     | 0.60%                         | 18.07%                     |
| 491                    | McCarthy Asset Management              | Redwood Shores, Calif.   | 330.34                       | 13.15%                       | \$1.47                     | 13.15%                        | 0.00%                      |
| 492                    | Kercheville Advisors                   | San Antonio, Texas       | 328.09                       | 11.47%                       | \$1.05                     | 11.83%                        | -0.32%                     |
| 493                    | MFA Wealth                             | Pittsburgh, Pa.          | 325.00                       | 18.87%                       | \$0.48                     | -8.57%                        | 30.02%                     |
| 494                    | Cascade Investment Group               | Colorado Springs, Colo.  | 317.57                       | 4.97%                        | \$0.37                     | -20.27%                       | 31.65%                     |
| 495                    | Poehling Capital Management            | Madison, Wis.            | 316.13                       | 14.71%                       | \$0.99                     | 24.39%                        | -7.78%                     |
| 496                    | Searcy Financial Services              | Overland Park, Kan.      | 309.65                       | 13.99%                       | \$1.79                     | 13.99%                        | 0.00%                      |
| 497                    | Manske Wealth Management               | Houston, Texas           | 308.04                       | 24.25%                       | \$0.96                     | 14.99%                        | 8.05%                      |
| 498                    | Socha Financial Group                  | Corning, N.Y.            | 304.62                       | 10.37%                       | \$0.43                     | 8.95%                         | 1.30%                      |
| 499                    | Horizon Wealth Advisors                | Houston, Texas           | 301.86                       | 13.84%                       | \$1.84                     | 11.75%                        | 1.86%                      |
| 500                    | R.W. Rogé & Company                    | Bohemia, N.Y.            | 299.16                       | 9.54%                        | \$1.04                     | 12.21%                        | -2.38%                     |
| 501                    | Wakefield Asset Management             | Englewood, Colo.         | 293.46                       | 5.15%                        | \$1.40                     | 20.17%                        | -12.50%                    |
| 502                    | Asio Capital                           | Lexington, Ky.           | 290.31                       | 44.22%                       | \$1.70                     | 29.04%                        | 11.76%                     |
| 503                    | NS Capital                             | Stamford, Conn.          | 290.00                       | 31.82%                       | \$2.23                     | 21.68%                        | 8.33%                      |
| 504                    | Fortune Wealth Management              | Dallas, Texas            | 289.91                       | 13.06%                       | \$1.28                     | 9.06%                         | 3.67%                      |
| 505                    | Falcon Wealth Planning                 | Ontario, Calif.          | 289.10                       | 42.74%                       | \$0.50                     | 17.91%                        | 21.05%                     |
| 506                    | Baron Financial Group                  | Fair Lawn, N.J.          | 288.68                       | 18.76%                       | \$0.97                     | 14.76%                        | 3.48%                      |
| 507                    | Trinity Financial Advisors             | Columbus, Ohio           | 286.17                       | 8.55%                        | \$1.95                     | -12.87%                       | 24.58%                     |

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# FA's 2021 RIA RANKING



RAYMOND JAMES

| 2020 TOTAL ASSETS RANK                                    | FIRM NAME                                | LOCATION                 | YEAR END 2020 ASSETS (\$MM)* | % GROWTH IN ASSETS 2019-2020 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|---|--|--------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 508   | Legacy Consulting Group                  | Plano, Texas             | 283.38                       | 14.01%                       | \$2.11                     | 8.91%                         | 4.69%                      |
| 509   | Treybourne Wealth Planners               | Greenwood, Ind.          | 281.91                       | 12.76%                       | \$0.89                     | 9.93%                         | 2.58%                      |
| 510   | Harbor Wealth Management                 | Boulder, Colo.           | 275.76                       | 21.25%                       | \$1.70                     | 14.51%                        | 5.88%                      |
| 511   | Berno Financial Management               | Cincinnati, Ohio         | 274.33                       | 15.12%                       | \$2.09                     | 9.85%                         | 4.80%                      |
| 512   | KCS Wealth Advisory                      | Los Angeles, Calif.      | 272.21                       | 13.08%                       | \$0.95                     | 9.16%                         | 3.60%                      |
| 513   | Samalin Investment Counsel               | Chappaqua, N.Y.          | 272.07                       | 29.19%                       | \$0.66                     | -6.33%                        | 37.92%                     |
| 514   | DeGreen Capital Management               | Glendale, Ariz.          | 271.86                       | 26.15%                       | \$1.03                     | 21.39%                        | 3.92%                      |
| 515   | Etesian Wealth Advisors                  | West Linn, Ore.          | 267.21                       | 24.17%                       | \$1.74                     | 53.19%                        | -18.95%                    |
| 516   | WealthCrest Financial Services           | Springfield, Va.         | 261.24                       | 57.17%                       | \$1.16                     | 74.63%                        | -10.00%                    |
| 517   | Sard Wealth Management Group             | Atlanta, Ga.             | 258.56                       | 15.37%                       | \$0.96                     | 11.51%                        | 3.46%                      |
| 518   | Fidato Wealth                            | Middleburg Heights, Ohio | 258.36                       | 21.65%                       | \$0.99                     | 16.08%                        | 4.80%                      |
| 519   | Sebold Capital Management                | Naperville, Ill.         | 256.40                       | 24.52%                       | \$1.77                     | 23.66%                        | 0.69%                      |
| 520   | TL Private Wealth                        | Southlake, Texas         | 256.00                       | 34.74%                       | \$1.16                     | 16.36%                        | 15.79%                     |
| 521   | Mighty Oak Strong America Investment Co. | Mechanicsburg, Pa.       | 254.68                       | 23.85%                       | \$1.77                     | 15.25%                        | 7.46%                      |
| 522   | Wealthview Capital                       | Jackson, Miss.           | 253.74                       | 21.65%                       | \$1.41                     | 19.62%                        | 1.69%                      |
| 523   | Sandbox Financial Partners               | Bethesda, Md.            | 252.82                       | 35.88%                       | \$0.82                     | -7.52%                        | 46.92%                     |
| 524   | Asset Planning Corporation               | Knoxville, Tenn.         | 252.26                       | 10.89%                       | \$1.22                     | 7.12%                         | 3.52%                      |
| <b>ASSET CATEGORY: \$150 MILLION TO &lt;\$250 MILLION</b> |  |                          |                              |                              |                            |                               |                            |
| 525   | Wasserman Wealth Management              | Farmington, Mich.        | 246.75                       | 8.66%                        | \$1.45                     | 2.26%                         | 6.25%                      |
| 526   | Financial Alternatives                   | La Jolla, Calif.         | 245.17                       | 6.27%                        | \$1.80                     | 3.15%                         | 3.03%                      |
| 527   | Burrus Financial Services                | Salt Lake City, Utah     | 243.57                       | 13.98%                       | \$0.57                     | 12.39%                        | 1.42%                      |
| 528   | Beverly Investment Advisors              | Beverly Hills, Calif.    | 238.61                       | 18.29%                       | \$3.98                     | -11.28%                       | 33.33%                     |
| 529   | Slayton Lewis                            | Salt Lake City, Utah     | 238.00                       | 14.98%                       | \$3.72                     | 11.38%                        | 3.23%                      |
| 530   | Dickmeyer Boyce Financial Management     | Fort Wayne, Ind.         | 237.00                       | 8.22%                        | \$0.60                     | -15.52%                       | 28.10%                     |
| 531   | Advisors Financial                       | Vienna, Va.              | 233.54                       | 9.66%                        | \$1.22                     | 3.38%                         | 6.08%                      |
| 532   | Life Planning Partners                   | Jacksonville, Fla.       | 232.75                       | 7.31%                        | \$2.42                     | 7.31%                         | 0.00%                      |
| 533   | Capital Investment Advisors              | Washington, D.C.         | 232.38                       | 13.02%                       | \$0.48                     | 34.00%                        | -15.65%                    |
| 534   | Precipio Wealth Management               | Bethesda, Va.            | 232.20                       | 5.76%                        | \$2.32                     | 5.76%                         | 0.00%                      |
| 535   | Family Wealth Advisory Group             | Cincinnati, Ohio         | 231.48                       | 15.70%                       | \$1.34                     | 3.67%                         | 11.61%                     |
| 536   | Tull Financial Group                     | Chesapeake, Va.          | 229.68                       | 11.33%                       | \$0.96                     | 10.87%                        | 0.42%                      |
| 537   | Vaughan & Co. Securities                 | Ridgewood, N.J.          | 228.00                       | 137.50%                      | \$2.07                     | 126.70%                       | 4.76%                      |
| 538   | Smedley Financial Services               | Salt Lake City, Utah     | 222.95                       | -3.64%                       | \$0.27                     | -1.39%                        | -2.28%                     |
| 539   | Empyrion Wealth Management               | Roseville, Calif.        | 222.11                       | 8.87%                        | \$2.68                     | 4.94%                         | 3.75%                      |
| 540   | Hixon Zuercher Capital Management        | Findlay, Ohio            | 221.83                       | 26.35%                       | \$0.79                     | 16.94%                        | 8.05%                      |
| 541   | Portfolio Wealth Advisors                | Albuquerque, N.M.        | 216.30                       | 36.96%                       | \$1.17                     | 31.78%                        | 3.93%                      |
| 542   | Foresight Capital Management Advisors    | Saline, Mich.            | 210.35                       | 10.83%                       | \$0.52                     | 0.75%                         | 10.00%                     |
| 543   | Spectrum Financial Alliance              | Nicholasville, Ky.       | 209.49                       | 3.02%                        | \$0.43                     | -16.86%                       | 23.91%                     |
| 544   | Miller Advisors                          | Kirkland, Wash.          | 205.28                       | 0.40%                        | \$0.96                     | 22.45%                        | -18.01%                    |
| 545   | SimpliFi                                 | San Diego, Calif.        | 200.55                       | 14.85%                       | \$0.69                     | 10.51%                        | 3.93%                      |
| 546   | Centerline Wealth Advisors               | Louisville, Ky.          | 200.42                       | 9.03%                        | \$0.79                     | 5.58%                         | 3.27%                      |
| 547   | Veripax Wealth Management                | Folsom, Calif.           | 195.72                       | 11.78%                       | \$0.82                     | 5.70%                         | 5.75%                      |
| 548   | Integrated Capital Management            | Bloomfield Hills, Mich.  | 190.38                       | 32.75%                       | \$0.56                     | 26.93%                        | 4.59%                      |
| 549   | Charleston Financial Advisors            | Charleston, S.C.         | 188.06                       | 7.75%                        | \$0.95                     | -0.45%                        | 8.24%                      |
| 550   | Merkle Retirement Planning               | Grimes, Iowa             | 186.31                       | 90.13%                       | \$0.38                     | 64.24%                        | 15.76%                     |
| 551   | Longview Financial Advisors              | Huntsville, Ala.         | 184.84                       | 4.95%                        | \$0.99                     | 5.52%                         | -0.53%                     |
| 552   | Professional Financial Strategies        | Pittsford, N.Y.          | 180.62                       | 11.42%                       | \$1.90                     | 11.42%                        | 0.00%                      |
| 553   | Summit Place Financial Advisors          | Summit, N.J.             | 179.72                       | 16.36%                       | \$6.66                     | 7.74%                         | 8.00%                      |
| 554   | Kemp Financial Management                | Fullerton, Calif.        | 178.61                       | 9.50%                        | \$1.17                     | 4.49%                         | 4.79%                      |
| 555   | Fiduciary Financial Advisors             | Grand Rapids, Mich.      | 174.10                       | 101.50%                      | \$0.60                     | 30.39%                        | 54.55%                     |
| 556   | TABR Capital Management                  | Orange, Calif.           | 165.74                       | 7.87%                        | \$0.71                     | 4.18%                         | 3.54%                      |
| 557   | Post Oak Private Wealth Advisors         | Houston, Texas           | 163.90                       | 20.52%                       | \$0.99                     | -5.05%                        | 26.92%                     |

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# FA's 2021 RIA RANKING



RAYMOND JAMES

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|--|---|--------------------------|------------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 558  | Private Capital Management                    | Larkspur, Calif.         | 161.33                       | 15.46%                       | \$3.51                     | 7.93%                         | 6.98%                      |
| 559  | Wealth Legacy Institute                       | Denver, Colo.            | 160.84                       | 10.27%                       | \$1.45                     | 5.30%                         | 4.72%                      |
| 560  | Purtill Financial                             | Highland Heights, Ohio   | 158.07                       | 61.84%                       | \$0.92                     | 59.96%                        | 1.18%                      |
| 561  | BCK Partner                                   | Corning, N.Y.            | 154.96                       | 21.05%                       | \$0.81                     | 14.74%                        | 5.49%                      |
| 562  | Colman Knight Advisory Group                  | Acton, Mass.             | 154.06                       | 15.69%                       | \$2.23                     | 5.63%                         | 9.52%                      |
| 563  | Beacon Financial Advisors                     | Rye Brook, N.Y.          | 152.00                       | 13.01%                       | \$3.10                     | 6.09%                         | 6.52%                      |
| 564  | Center for Asset Management                   | Palm Beach Gardens, Fla. | 151.72                       | 15.05%                       | \$0.80                     | 9.60%                         | 4.97%                      |
| 565  | Canter Wealth                                 | La Jolla, Calif.         | 151.65                       | 27.95%                       | \$0.87                     | -1.46%                        | 29.85%                     |
| <b>ASSET CATEGORY: \$50 MILLION TO &lt;\$150 MILLION</b> |   |                          |                              |                              |                            |                               |                            |
| 566  | Atwater Wealth Management                     | Boston, Mass.            | 147.90                       | 23.22%                       | \$1.76                     | 18.82%                        | 3.70%                      |
| 567  | Gold Medal Waters                             | Boulder, Colo.           | 143.58                       | 17.56%                       | \$1.05                     | 15.85%                        | 1.48%                      |
| 568  | HCO Private Wealth                            | Roanoke, Va.             | 142.86                       | 18.04%                       | \$1.15                     | 11.38%                        | 5.98%                      |
| 569  | SkyOak Capital                                | Las Vegas, Nev.          | 142.18                       | N/A                          | \$0.67                     | N/A                           | 12.77%                     |
| 570  | Smith Bruer Advisors                          | Tallahassee, Fla.        | 138.96                       | 16.27%                       | \$0.59                     | 13.79%                        | 2.17%                      |
| 571  | Lighthouse Wealth Management                  | Ashland, Ohio            | 138.30                       | 25.40%                       | \$0.43                     | 24.62%                        | 0.63%                      |
| 572  | FSA Advisors                                  | Warren, Mich.            | 137.18                       | 77.22%                       | \$0.13                     | 29.97%                        | 36.35%                     |
| 573  | T2 Asset Management                           | Oakbrook Terrace, Ill.   | 137.00                       | 0.74%                        | \$0.26                     | -5.10%                        | 6.15%                      |
| 574  | Kotys Wealth Professionals                    | Valparaiso, Ind.         | 136.21                       | 34.13%                       | \$0.53                     | 22.69%                        | 9.32%                      |
| 575  | Macke Financial Advisory Group                | Fort Myers, FL, Fla.     | 135.36                       | 5.47%                        | \$1.38                     | 3.32%                         | 2.08%                      |
| 576  | Paragon Wealth Management                     | Provo, Utah              | 127.29                       | 15.85%                       | \$0.90                     | 10.92%                        | 4.44%                      |
| 577  | Ivy League Financial Advisors                 | Rockville, Md.           | 125.06                       | 10.64%                       | \$1.32                     | 17.63%                        | -5.94%                     |
| 578  | ChartMark Investments                         | Tulsa, Okla.             | 120.00                       | 60.00%                       | \$1.20                     | 52.00%                        | 5.26%                      |
| 579  | Focus Financial Advisors                      | Rockford, Ill.           | 115.47                       | 5.28%                        | \$0.82                     | 5.28%                         | 0.00%                      |
| 580  | Elderado Financial                            | Montrose, Colo.          | 114.90                       | 22.78%                       | \$0.38                     | 13.02%                        | 8.63%                      |
| 581  | Equita Financial Network                      | Fort Washington, Pa.     | 107.61                       | 153.72%                      | \$0.53                     | -12.94%                       | 191.43%                    |
| 582  | Kimble Advisory                               | Richmond, Va.            | 103.88                       | 16.67%                       | \$1.60                     | 7.70%                         | 8.33%                      |
| 583  | Murphy Capital Advisors                       | Goodyear, Ariz.          | 98.98                        | 8.37%                        | \$1.32                     | 8.37%                         | 0.00%                      |
| 584  | Define Financial                              | San Diego, Calif.        | 94.08                        | 27.83%                       | \$1.45                     | 10.13%                        | 16.07%                     |
| 585  | Steward Advisors                              | Chicago, Ill.            | 92.89                        | 13.15%                       | \$1.39                     | 1.33%                         | 11.67%                     |
| 586  | Sommers Financial Management                  | St helens, Ore.          | 90.00                        | 45.16%                       | \$0.22                     | 35.58%                        | 7.07%                      |
| 587  | Brighton Financial Planning                   | Flemington, N.J.         | 84.35                        | 18.85%                       | \$0.84                     | 18.85%                        | 0.00%                      |
| 588  | Chilmark Financial Advisors                   | Miami, Fla.              | 78.05                        | 10.60%                       | \$1.35                     | 8.69%                         | 1.75%                      |
| 589  | Westfield Wealth Management                   | Westfield, N.J.          | 76.29                        | 18.66%                       | \$1.09                     | 23.74%                        | -4.11%                     |
| 590  | First and Main Financial                      | Piedmont, Calif.         | 72.00                        | 34.33%                       | \$0.85                     | 2.72%                         | 30.77%                     |
| 591  | Horizons Planning Corporation                 | Ann Arbor, Mich.         | 69.00                        | 18.97%                       | \$0.30                     | -2.57%                        | 22.11%                     |
| 592  | Graf Financial                                | Baton Rouge, La.         | 61.25                        | 4.32%                        | \$1.30                     | 13.20%                        | -7.84%                     |
| 593  | MTR Financial Services                        | Kingwood, Texas          | 59.21                        | 47.65%                       | \$0.70                     | 16.39%                        | 26.87%                     |
| 594  | Bills Asset Management                        | Nashville, Tenn.         | 55.66                        | 13.58%                       | \$0.28                     | -0.62%                        | 14.29%                     |
| 595  | Oak Street Advisors                           | Myrtle Beach, S.C.       | 52.31                        | 7.19%                        | \$0.49                     | 14.20%                        | -6.14%                     |
| 596  | Safe Harbor Asset Management                  | Huntington, N.Y.         | 49.66                        | 6.55%                        | \$1.01                     | 6.55%                         | 0.00%                      |
| 597  | Prince Financial Advisory                     | New York, N.Y.           | 42.88                        | 22.16%                       | \$0.73                     | 26.30%                        | -3.28%                     |
| 598  | Shriver Investments                           | Parker, Colo.            | 40.48                        | 14.84%                       | \$0.57                     | 13.22%                        | 1.43%                      |
| 599  | MFAC Financial Advisors                       | Westlake Village, Calif. | 38.93                        | 8.98%                        | \$3.24                     | 8.98%                         | 0.00%                      |
| 600  | Generations Investment Advisors               | High Point, N.C.         | 26.00                        | 0.00%                        | \$0.26                     | -11.88%                       | 13.48%                     |
| 601  | Aerie Capital Management                      | Baltimore, Md.           | 16.30                        | 29.35%                       | \$0.29                     | 27.08%                        | 1.79%                      |
| 602  | Venn Wealth & Benefit Services                | Altoona, Pa.             | 14.52                        | -0.20%                       | \$0.16                     | -2.45%                        | 2.30%                      |
| 603  | Aurora Strategic Advisors                     | Lumberton, N.C.          | 13.50                        | 107.69%                      | \$0.05                     | 56.75%                        | 32.50%                     |
| 604  | Birch Investment Management                   | Brookings, S.D.          | 13.42                        | 25.30%                       | \$0.23                     | 12.34%                        | 11.54%                     |
| 605  | Lindy S. Diamond, Personal Financial Services | San Marcos, Calif.       | 8.59                         | 18.97%                       | \$0.86                     | 7.07%                         | 11.11%                     |
| 606  | Atherean Wealth Management                    | Jersey City, N.J.        | 6.12                         | 23.38%                       | \$0.29                     | 17.50%                        | 5.00%                      |
| 607  | Carthage Financial Group                      | Braintree, Mass.         | 5.20                         | 13.04%                       | \$0.10                     | 1.74%                         | 11.11%                     |

\*Discretionary and nondiscretionary AUM reported on Form ADV. \*\*Average assets per client relationship. †Transitioned to an independent RIA in 2020.

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