

TOP 50 REGISTERED INVESTMENT ADVISERS

KEY ■ Firms with greatest year-over-year growth
◀ Rank according to YOY growth

| | Firm | Main Office | AUM, in Millions |
|-----------|-----------------------------------------|------------------------|------------------|
| 1 | Wetherby Asset Management | San Francisco | \$3,626 |
| 2 | Homrich Berg | Atlanta | 3,518 |
| 3 | Evanson Asset Management | Carmel, California | 3,480 |
| 4 | Bartlett | Cincinnati | 3,351 |
| 5 | Klingenstein, Fields | New York | 3,200 |
| 6 | Regent Atlantic | Morristown, New Jersey | 3,094 |
| 7 | R.M. Davis | Portland, Maine | 3,072 |
| 8 | Dowling & Yahnke | San Diego | 2,970 |
| 9 | Atherton Lane Advisers | Menlo Park, California | 2,703 |
| 10 | Ropes Wealth Advisors | Boston | 2,384 |
| 11 | Halbert Hargrove Global Advisors | Long Beach, California | 2,226 |
| 12 | Budros, Ruhlin & Roe | Columbus, Ohio | 1,956 |
| 13 | Heritage Investors Management | Bethesda, Maryland | 1,931 |
| 14 | Wescott Financial Advisory Group | Philadelphia | 1,926 |
| 15 | Retirement Advisors of America | Addison, Texas | 1,912 |
| 16 | EP Wealth Advisors | Torrance, California | 1,850 |
| 17 | Wharton Business Group | Malvern, Pennsylvania | 1,829 |

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|-----------|-------------------------------------------|----------------------------------------|--------------|
| 18 | JMG Financial Group | <i>Oak Brook, Illinois</i> | 1,733 |
| 19 | Yale Capital | <i>Dorado, Puerto Rico</i> | 1,700 |
| 20 | Badgley Phelps Investment Managers | <i>Seattle</i> | 1,684 |
| 21 | TCI Wealth Advisors | <i>Tucson, Arizona</i> | 1,661 |
| 22 | Destination Wealth Management | <i>Walnut Creek, California</i> | 1,490 |
| 23 | Sand Hill Global Advisors | <i>Palo Alto, California</i> | 1,420 |
| 24 | Barrett Asset Management | <i>New York</i> | 1,418 |
| 25 | Accredited Investors | <i>Edina, Minnesota</i> | 1,406 |
| 26 | Sage Financial Group | <i>West Conshohocken, Pennsylvania</i> | 1,384 |
| 27 | Retirement Income Solutions | <i>Ann Arbor, Michigan</i> | 1,334 |
| 28 | Chesley, Taft & Associates | <i>Chicago</i> | 1,327 |
| 29 | Northeast Investment Management | <i>Boston</i> | 1,324 |
| 30 | Resource Consulting Group | <i>Orlando, Florida</i> | 1,320 |
| 31 | Salem Investment Counselors | <i>Winston-Salem, North Carolina</i> | 1,312 |
| 32 | Green Square Capital | <i>Memphis, Tennessee</i> | 1,303 |
| 33 | Bridgewater Advisors | <i>New York</i> | 1,262 |
| 34 | Montag | <i>Atlanta</i> | 1,249 |
| 35 | Brightworth | <i>Atlanta</i> | 1,206 |
| 36 | Capstone Financial Advisors | <i>Downers Grove, Illinois</i> | 1,197 |
| 37 | McQueen, Ball & Associates | <i>Bethlehem, Pennsylvania</i> | 1,186 |
| 38 | Parsons Capital Management | <i>Providence, Rhode Island</i> | 1,093 |
| 39 | Guyasuta Investment Advisors | <i>Pittsburgh</i> | 1,081 |
| 40 | Balentine | <i>Atlanta</i> | 1,043 |
| 41 | HHG | <i>Darien, Connecticut</i> | 1,027 |
| 42 | Emerv Howard | <i>Burlingame, California</i> | 1,026 |

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|-----------|-------------------------------------------------|---------------------------------|--------------|
| 43 | TrueWealth | <i>Atlanta</i> | 1,001 |
| 44 | Heritage Financial Services | <i>Westwood, Massachusetts</i> | 956 |
| 45 | Sapere Wealth Management | <i>Matthews, North Carolina</i> | 945 |
| 46 | Reynders, McVeigh Capital Management | <i>Boston</i> | 926 |
| 47 | New England Private Wealth Advisors | <i>Wellesley, Massachusetts</i> | 900 |
| 48 | Durbin Bennett Private Wealth Management | <i>Austin, Texas</i> | 898 |
| 49 | ParenteBeard Wealth Management | <i>Lancaster, Pennsylvania</i> | 882 |
| 50 | Maryland Capital Management | <i>Baltimore</i> | 881 |

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**AUM includes discretionary assets that use to buy and sell securities and make o*

***No full year of AUM because filing was Source: Bloomberg*