

TOP 150 RIA FIRMS

RANK	FIRM	LOCATION	AUM (000)	CLIENT ACCOUNTS	ADVISERS	EMPLOYEES
51	Budros, Ruhlin & Roe	Columbus, Ohio	\$2,046.65	6,511	22	40
52	Columbia Pacific Wealth Management	Seattle	\$2,020.20	595	17	20
53	Wescott Financial Advisory Group	Philadelphia	\$2,013.90	2,254	13	33
54	Badgley Phelps Wealth Managers	Seattle	\$2,011.38	1,499	20	23
55	Valeo Financial Advisors	Indianapolis	\$2,005.47	7,839	37	46
56	TCI Wealth Advisors	Tucson, Ariz.	\$1,980.85	6,466	19	51
57	Heritage Investors Management	Bethesda, Md.	\$1,972.36	1,150	6	12
58	David Vaughan Investments	Peoria, Ill.	\$1,967.89	1,872	18	22
59	Mainstay Capital Management	Grand Blanc, Mich.	\$1,930.31	3,800	15	22
60	Boston Financial Management	Boston	\$1,899.98	1,998	26	44
61	Zemenick & Walker	St. Louis	\$1,884.80	179	7	11
62	Retirement Advisors of America	Addison, Texas	\$1,865.76	3,931	17	35
63	JMG Financial Group	Oak Brook, Ill.	\$1,862.81	2,531	21	34
64	Green Square Capital	Memphis, Tenn.	\$1,841.71	1,855	15	23
65	Lake Street Advisors	Portsmouth, N.H.	\$1,817.46	1,079	18	31
66	Rinet	Boston	\$1,757.74	1,220	16	27
67	Twin Focus Capital Partners	Boston	\$1,741.90	82	15	20
68	SYM Financial Advisors	Winona Lake, Ind.	\$1,737.97	3,684	21	42
69	Parsec Financial Management	Asheville, N.C.	\$1,722.27	4,452	35	23
70	LBI Wealth Management	Saddle River, N.J.	\$1,709.81	200	1	3
71	Exencial Wealth Advisors	Oklahoma City	\$1,678.21	2,922	22	48
72	Mozaic	Beverly Hills, Calif.	\$1,677.02	63	1	11
73	Welch Hornsby	Montgomery, Ala.	\$1,673.56	452	13	25
74	Capital Directions	Atlanta	\$1,657.00	1,196	5	12
75	Modera Wealth Management	Westwood, N.J.	\$1,640.19	4,156	25	45

Source: Discovery Data; statistics gathered from Form ADV filings as of November 2016.