

# Top 10 Fastest-Growing Firms (By Asset Category)

	GROWTH RANK	FIRM NAME	LOCATION	% GROWTH IN ASSETS 2006-2007	YEAR END 2007 ASSETS (\$MM)
\$1 Billion And Over	1	myCIO Wealth Partners	Philadelphia, Pa.	85.92	4,510.60
	2	The Mutual Fund Store	Overland Park, Kan.	54.37	4,078.44
	3	Index Funds Advisors	Irvine, Calif.	50.63	1,058.92
	4	Moneta Group Investment Advisors	St. Louis, Mo.	37.43	7,932.46
	5	Signature Estate & Investment Advisors	Los Angeles, Calif.	35.26	1,376.90
	6	Plante Moran Financial Advisors	Southfield, Mich.	34.19	5,364.89
	7	GenSpring Family Offices	Palm Beach Gardens, Fla.	33.01	13,132.95
	8	Presidio Wealth Management	San Francisco, Calif.	31.49	3,813.16
	9	Ballentine Finn & Company	Wolfeboro, N.H.	30.33	1,995.00
	10	Westcott Financial Advisory Group	Philadelphia, Pa.	27.08	1,525.00
\$500 Million To \$1 Billion	1	Greenwich Wealth Management	Greenwich, Conn.	2,428.57	885.00
	2	Rehmann Financial	Lansing, Mich.	710.78	564.58
	3	Whitnell & Company	Oak Brook, Ill.	95.69	747.69
	4	Patriot Wealth Management	Houston, Tex.	43.20	649.27
	5	Legacy Wealth Management	Memphis, Tenn.	38.23	573.37
	6	Fairway Wealth Management	Cleveland, Ohio	38.11	540.01
	7	CFS Investment Advisory Services	Totowa, N.J.	33.70	631.22
	8	Cassaday & Company	McLean, Va.	25.29	918.01
	9	Brinton Eaton Wealth Advisors	Morristown, N.J.	24.95	538.03
	10	Abacus Wealth Partners	Sebastopol, Calif.	23.44	808.37
\$300 Million To \$500 Million	1	IPI Asset Management	Decatur, Ill.	346.83	428.44
	2	Horan Capital Management	Baltimore, Md.	110.53	480.00
	3	RG Capital	Scottsdale, Ariz.	108.33	450.01
	4	Sovereign Wealth Management	Memphis, Tenn.	64.55	449.33
	5	Camden Capital Management	El Segundo, Calif.	50.00	300.00
	6	JWA Financial Group	Dallas, Tex.	40.37	413.58
	7	Burns Advisory Group	Oklahoma City, Okla.	39.93	323.10
	8	Heritage Financial Service	Norwood, Mass.	33.33	440.00
	9	New England Investment & Retirement Group	North Andover, Mass.	28.80	322.00
	10	Legend Financial Advisors	Pittsburgh, Pa.	28.60	323.97
\$100 Million To \$300 Million	1	Stevens First Principles Investment Advisors	Newport Beach, Calif.	689.54	233.00
	2	Wealthquest Corporation	Cincinnati, Ohio	163.08	171.00
	3	Nixon Peabody Financial Advisors	Rochester, N.Y.	151.22	152.26
	4	McKinley Carter Wealth Services	Wheeling, W. Va.	145.95	294.90
	5	JW Coons Advisors	Columbus, Ohio	127.72	104.04
	6	Corestates Capital Advisors	Newtown, Pa.	121.53	295.35
	7	CRA Financial Services	Northfield, N.J.	110.00	211.27
	8	<b>Wealth Health</b>	<b>Roseland, N.J.</b>	<b>85.45</b>	<b>102.00</b>
	9	Hallett & Associates	Port Angeles, Wash.	83.52	162.00
	10	Edge Portfolio Management	Winfield, Ill.	81.82	100.00
\$75 Million To \$100 Million	1	Vermillion Financial Advisors	South Barrington, Ill.	376.47	81.00
	2	Century Wealth Management	Memphis, Tenn.	140.71	88.76
	3	Triton Wealth Management	Annapolis, Md.	35.97	84.30
	4	Allen Capital Group	Grand Island, Neb.	31.22	82.51
	5	Salem Partners Wealth Management	Los Angeles, Calif.	27.99	78.07
	6	Family Wealth Advisory Group	Cincinnati, Ohio	26.31	77.78
	7	Dorman Financial Management	Maitland, Fla.	25.00	95.00
	8	F.I.G. Financial Advisory Services	Edmond, Okla.	23.96	88.56
	9	JVL Associates	Wyoming, Mich.	22.54	97.30
	10	Caton Financial	Larkspur, Calif.	21.63	95.73

Source: Discovery

# FA's 2008 RIA Ranking (By Total Assets)

2007 TOTAL ASSETS RANK*	FIRM NAME	LOCATION	YEAR END 2007 ASSETS (\$MM)	% GROWTH IN ASSETS 2006-2007	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	RANK IN ASSETS PER CLIENT
291	Sensible Financial Planning and Management	Cambridge, Mass.	135.00	-27.03	1.06	-42.54	217
292	Kuntz Leshner Capital	Lancaster, Pa.	133.29	24.00	0.51	17.83	331
293	Horizon Advisors	Houston, Tex.	132.47	14.33	1.87	-11.44	109
294	WJ Interests	Sugar Land, Tex.	132.30	15.34	1.15	6.32	198
295	Kahler Financial Group	Rapid City, S.D.	132.09	12.27	2.00	-4.74	94
296	Stevens Portfolio Design	Deerfield, Ill.	131.23	25.26	1.51	5.10	138
297	Asset Planning Corporation	Knoxville, Tenn.	130.84	9.39	1.01	7.69	229
298	Callan Capital	La Jolla, Calif.	130.00	+	2.95	+	59
299	Hardy Reed Frugé Capital Advisors	Tupelo, Miss.	127.83	19.51	0.88	-13.46	256
300	Mark Sheptoff Financial Planning	Glastonbury, Conn.	126.00	16.67	0.93	-1.48	243
301	Legacy Consulting Group	Plano, Tex.	125.03	11.38	1.33	7.82	169
302	Hopwood Financial Services	Great Falls, Va.	125.02	23.62	1.28	5.96	176
303	The Retirement Planning Group	Overland Park, Kan.	125.01	19.50	0.53	1.70	323
304	Summit Wealth Group	Colorado Springs, Colo.	125.00	7.76	0.25	-28.88	374
305	Classic Capital	Short Hills, N.J.	124.50	20.11	1.48	1.52	143
306	Houlihan Financial Resource Group	Reston, Va.	124.16	6.54	1.97	-1.91	97
307	Kraft Asset Management	Nashville, Tenn.	122.95	19.24	1.43	-4.33	153
308	Netting & Pace	San Antonio, Tex.	122.23	7.74	2.22	-2.05	83
309	Miller Advisors	Kirkland, Wash.	122.00	10.91	0.55	18.47	318
310	Focus Financial Advisors	Rockford, Ill.	120.90	11.79	0.98	2.71	234
311	Keller & Associates	Victoria, Tex.	120.29	8.51	0.77	7.12	281
312	Morris Financial Concepts	Mt. Pleasant, S.C.	116.51	14.43	0.57	-0.23	313
313	RMR Financial Advisors	Madison, Wis.	116.19	9.39	0.58	3.97	312
314	Roof Advisory Group	Harrisburg, Pa.	114.30	37.11	1.41	21.87	154
315	Ritter Daniher Financial Advisory	Cincinnati, Ohio	113.34	24.90	0.94	6.16	241
316	Kemp Financial Management	Fullerton, Calif.	113.01	26.96	0.79	2.10	278
317	Searcy Financial Services	Overland Park, Kan.	112.50	10.62	0.82	7.39	270
318	Holbrook Global Strategies	Palo Alto, Calif.	112.40	14.46	3.51	3.73	45
319	The Darrow Company	Concord, Mass.	112.06	32.07	1.14	15.90	199
320	Dean Consulting & Associates	San Diego, Calif.	111.44	6.51	1.49	6.51	142
321	Paradigm Financial Advisors	Des Peres, Mo.	110.87	17.97	1.09	2.94	212
322	Access Financial Resources	Oklahoma City, Okla.	110.10	0.00	0.58	-20.63	311
323	Polaris Equity Management	San Francisco, Calif.	110.00	15.79	0.55	44.74	319
324	Sentinel Wealth Management	Reston, Va.	109.10	6.74	1.54	0.72	132
325	Anderson Riley & Spoor	St. Petersburg, Fla.	108.00	44.00	0.83	21.85	267
326	Focus Wealth Management	Middleburg, Va.	108.00	8.07	1.35	-5.44	165
327	Family Financial Architects	Natick, Mass.	107.29	9.46	0.78	3.91	280
328	D B & B Financial Services	Syracuse, N.Y.	107.19	4.96	0.46	4.51	342
329	Kummer Financial Strategies	Highlands Ranch, Colo.	107.00	27.38	0.31	0.09	366
330	Tortoise Investment Management	White Plains, N.Y.	106.97	42.37	1.39	10.93	158
331	Macke Financial Advisory Group	Fort Myers, Fla.	106.88	24.04	0.80	20.34	273
332	RPH Financial Services	Sciota, Pa.	105.25	15.46	0.59	17.41	310
333	Sutterfield Financial Group	Bartlesville, Okla.	104.52	44.90	0.16	11.46	380
334	J W Coons Advisors	Columbus, Ohio	104.04	127.72	2.89	32.84	60
335	Brown Financial Advisory	Fairhope, Ala.	103.75	9.26	0.66	14.79	297
336	Slayton Lewis	Salt Lake City, Utah	103.67	23.06	1.96	11.45	100
337	Rochester Financial Services	Pittsford, N.Y.	102.47	11.10	0.44	6.35	347
338	Welz Financial Services	Stockton, Calif.	102.14	3.68	0.87	-6.87	257
339	<b>Wealth Health</b>	<b>Roseland, N.J.</b>	<b>102.00</b>	<b>85.45</b>	<b>1.46</b>	<b>-20.52</b>	<b>145</b>
340	Mendel Money Management	Northbrook, Ill.	102.00	24.39	0.85	19.21	262

\*Discretionary and nondiscretionary assets under management reported on Form ADV. \*\*Average assets per client relationship. + Not meaningful. Firm founded in 2007.