

FIA

FINANCIAL ADVISOR



RIA

SURVEY & RANKING

2014

SPONSORED BY



TOP 50 FASTEST-GROWING FIRMS

GROWTH RANK	FIRM NAME	LOCATION	YEAR END 2013 ASSETS (\$MM)	% GROWTH IN ASSETS 2012-2013	2013 CLIENTS	% GROWTH IN ASSETS PER CLIENT
1	Consilium Wealth Advisory	Richardson, Texas	270.00	1,700.00	25	260.00
2	AM Global Family Investment Office	West Palm Beach, Fla.	226.82	844.28	12	450.83
3	Banyan Partners	Palm Beach Gardens, Fla.	4,581.00	312.77	2176	145.46
4	BlueSky Wealth Advisors	New Bern, N.C.	220.00	230.63	180	56.13
5	Source Financial Advisors	New York, N.Y.	414.26	206.22	74	86.22
6	LeafHouse Financial Advisor	Austin, Texas	394.90	161.52	180	88.88
7	Horter Investment Management	Cincinnati, Ohio	700.17	127.20	5,332	27.83
8	CM Wealth Advisors	Pepper Pike, Ohio	2,551.82	117.92	63	100.62
9	Argent Wealth Management	Waltham, Mass.	1,282.07	110.84	200	15.96
10	Bridgewater Wealth & Financial Management	Bethesda, Md.	469.55	109.25	220	26.50
11	Halbert Hargrove	Long Beach, Calif.	3,974.64	94.35	467	111.00
12	KR Financial Services	Hollywood, Fla.	306.96	90.40	272	68.00
13	Advisors Capital Management	Hasbrouck Heights, N.J.	763.81	88.13	1,500	12.88
14	Larson Financial Group	St. Louis, Mo.	377.13	86.37	1,500	61.52
15	Atlas Private Wealth Management	Williamstown, Mass.	1,003.63	84.44	1,750	42.28
16	Washington Wealth Management	San Diego, Calif.	1,030.82	83.72	3,100	13.38
17	ERISA Fiduciary Advisors	Weston, Fla.	544.35	80.14	37	60.67
18	The Mather Group	Oakbrook Terrace, Ill.	435.59	78.52	337	48.33
19	WorthPointe	Austin, Texas	266.00	77.33	350	26.67
20	Stratos Wealth Partners Ltd.	Beachwood, Ohio	1,872.12	76.76	5,162	44.60
21	Connecticut Wealth Management	Farmington, Conn.	428.27	74.82	345	44.42
22	Avant-Garde Advisors	Centennial, Colo.	278.14	73.59	368	10.38
23	Advocacy Wealth Management	Atlanta, Ga.	293.00	69.36	500	8.39
24	Next Generation Wealth Management	Milwaukee, Wis.	185.59	69.28	188	-16.26
25	Ellis Investment Partners	Berwyn, Pa.	316.58	68.29	339	4.75
26	R.S. Crum	Newport Beach, Calif.	348.97	68.08	180	16.72
27	W.E. Family Offices	Miami, Fla.	2,712.74	66.01	61	▲
28	Brookstone Capital Management	Wheaton, Ill.	887.00	62.75	8,200	40.92
29	Klingman and Associates	New York, N.Y.	1,073.05	59.92	251	54.18
30	JFS Wealth Advisors	Hermitage, Pa.	1,434.13	59.47	1,142	16.04
31	Forum Financial Management	Lombard, Ill.	1,615.62	58.66	1,946	14.14
32	Sheaff Brock Investment Advisors	Indianapolis, Ind.	621.05	58.41	1,104	16.65
33	Regal Investment Advisors	Kentwood, Mich.	575.72	58.08	3,094	-12.89
34	Richmond Brothers	Jackson, Mich.	229.81	57.93	621	52.59
35	ARGI Financial Group	Louisville, Ky.	755.41	57.14	1,523	56.31
36	Personal Financial Group	Overland Park, Kan.	209.06	56.69	426	47.13
37	Northside Capital Management	Hood River, Ore.	4,409.17	56.41	25	37.64
38	Cape Ann Capital	Manchester, Mass.	175.00	56.25	167	44.09
39	Creative Planning	Leawood, Kan.	9,105.36	55.54	6,812	10.46
40	Asset Management Advisors	Houston, Texas	304.00	55.10	64	50.26
41	Lighthouse Financial Services	Brea, Calif.	168.62	54.93	300	25.49
42	Gradient Investments	Arden Hills, Minn.	447.32	53.92	3,152	-2.72
43	Wealth Health	Roseland, N.J.	214.48	53.34	80	59.09
44	Warren Financial Service	Exton, Pa.	109.38	52.60	219	49.11
45	Global Financial Private Capital	Sarasota, Fla.	3,106.93	52.07	12,768	38.54
46	Delphi Private Advisors	San Diego, Calif.	384.63	50.47	147	7.48
47	Vivaldi Capital Management	Northfield, Ill.	421.25	49.80	125	-10.12
48	Andrews Lucia Wealth Management	San Mateo, Calif.	190.43	49.29	110	18.08
49	BLB & B Advisors	Ambler, Pa.	669.27	49.24	1,600	24.06
50	Pure Financial Advisors	San Diego, Calif.	904.60	49.20	1,188	14.29

▲ Not meaningful. W.E.'s predecessor firm grouped clients differently.