

OUR TOP WEALTH MANAGERS

# SUPER STARS

OUR TOP ADVISORY FIRMS ARE BIGGER  
THAN EVER, EVEN WHEN THEY SHOW  
THE BEST THINGS COME IN SMALL  
PACKAGES. BY RICHARD J. KORETO

## OUR TOP WEALTH MANAGERS

Rank/Firm	Location	Avg. client relationship
301 Creative Planning	Overland Park, KS	\$863,636.36
302 Wechter Financial Services	Parsippany, NJ	857,764.40
303 Greystone Financial Group	Troy, MI	844,815.03
304 Mallard Advisors	Newark, DE	841,445.78
305 Sadow Investment Management	Milwaukee, WI	837,013.10
306 Signature Estate & Invest. Advisors	Los Angeles, CA	836,112.06
307 Mark Sheptoff Financial Planning	Glastonbury, CT	835,051.55
308 Linscomb & Williams	Houston, TX	830,496.70
309 Gordon Asset Management	Durham, NC	830,246.67
310 Larry Heller & Associates	Melville, NY	827,038.76
311 Focus Financial Advisors	Rockford, IL	825,846.78
312 The Darrow Company	Concord, MA	824,129.45
313 NetWorth Investment Advisors	McMurray, PA	821,385.10
314 Burns Matteson Capital Management	Corning, NY	819,238.22
315 Barnes Investment Advisory	Phoenix, AZ	819,177.68
316 Staton Financial Advisors	Charlotte, NC	818,181.82
317 Enright Premier Wealth Advisors	Torrance, CA	815,533.98
318 Parsec Financial Management	Asheville, NC	810,347.32
319 Valley National Advisers	Bethlehem, PA	808,788.57
320 Ritter Daniher Financial Advisory	Cincinnati, OH	806,906.89
321 RPH Financial Services	Sciota, PA	801,034.71
322 Lexington Wealth Management	Lexington, MA	800,000.00
323 Matrix Wealth Advisors	Charlotte, NC	797,047.62
324 Asset Planning Corporation	Knoxville, TN	792,504.18
325 Crescent Sterling	Metairie, LA	791,926.04
326 Asset Strategies	Casper, WY	790,296.00
327 Strategic Wealth Management Group	Columbia, MD	781,688.27
328 Peak Financial Advisors	Denver, CO	779,464.62
329 The Copeland Grp. Financial Advisors	Redlands, CA	777,070.06
330 Capital Performance Advisors	Walnut Creek, CA	771,039.72
331 JWA Financial Group	Dallas, TX	770,326.22
332 Curran & Lewis Investment Mgmt.	Menlo Park, CA	762,252.91
333 Professional Asset Strategies	Birmingham, AL	759,880.27
334 Wheeler/Frost Associates	San Diego, CA	759,704.70
335 Essential Financial Planning	Albuquerque, NM	757,085.24
336 Herbein Wealth Management	Wyomissing, PA	756,300.82
337 Private Wealth Advisors	Pittsburgh, PA	755,582.39
338 Professional Financial Strategies	Pittsford, NY	754,781.91
339 Professional Financial Advisors	Media, PA	740,359.22
340 Leonetti & Associates	Buffalo Grove, IL	740,000.00
341 Otto & Associates	Katonah, NY	736,136.20
342 Meridian Capital Management	Los Alamitos, CA	735,714.29
343 Financial Management Concepts	Winter Springs, FL	733,823.61
344 M.D. Kresh Financial Services	Islandia, NY	733,695.65
345 Lenox Advisors	New York, NY	733,333.33
346 Savant Capital Management	Rockford, IL	732,583.98
347 Harold C. Brown & Co.	Buffalo, NY	722,255.29
348 The Baron Financial Group	Fair Lawn, NJ	722,222.22
349 Kenneth Frenke & Co.	Arden, NC	720,338.98
350 Capital Advisory Group	Dallas, TX	714,002.29

Rank/Firm	Location	Avg. client relationship
351 Syverson Stregre & Company	West Des Moines, IA	\$709,740.32
352 Kaye Capital Management	Los Angeles, CA	709,283.22
353 Covenant Wealth Advisors	Williamsburg, VA	709,051.15
354 THOR Investment Management	Cincinnati, OH	705,659.18
355 Warren, Averett, Kimbrough & Marino With. Mgmt.	Birmingham, AL	705,298.46
356 Tull Financial Group	Chesapeake, VA	698,381.43
357 Kabarec Financial Advisors	Palatine, IL	698,110.34
358 Cooper, Jones & McLeland	Fairfax, VA	689,822.79
359 Sather Financial Group	Victoria, TX	683,553.53
360 Donald W. Nicholson & Associates	Wilmington, DE	683,436.39
361 Family Financial Architects	Natick, MA	674,871.69
362 Horan Capital Management	Towson, MD	670,033.67
363 Grunden Financial Advisory	Denton, TX	650,329.67
364 Asset Management Group	Stamford, CT	649,631.41
365 Harris Financial Advisors	Torrance, CA	645,007.94
366 John G. Ullman & Associates	Corning, NY	637,755.10
367 Financial Connections Group	Berkeley, CA	635,202.31
368 Polaris Equity Management	Mill Valley, CA	626,666.67
369 Waller Financial Planning Group	Columbus, OH	625,359.05
370 Halpern Financial	Rockville, MD	615,897.61
371 Petersen Hastings Investment Mgmt.	Kennewick, WA	614,538.56
372 DiNuzzo Investment Advisors	Beaver, PA	614,506.42
373 McBrearty Capital Management	Knoxville, TN	607,583.66
374 WebsterRogers Financial Advisors	Florence, SC	606,520.28
375 Hoffman and Hock	Phoenix, AZ	605,149.56
376 Hoxton Financial	Shepherdstown, WV	598,651.07
377 Spraker, Fitzgerald, Tamayo & Moisand	Maitland, FL	590,653.14
378 Grant Koehler & Levin LTD	Mequon, WI	584,949.37
379 Macke Financial Advisory Group	Fort Myers, FL	577,079.05
380 WS Investment Advisors	Greenwood Village, CO	575,709.34
381 Bedrock Capital Management	Los Altos, CA	571,153.85
382 HBK Sorce Advisory	Erie, PA	570,629.37
383 Ferguson Asset Management	Potomac, MD	570,214.31
384 Rodgers & Associates	Lancaster, PA	568,035.88
385 Vintage Financial Services	Ann Arbor, MI	555,050.51
386 Mutual Fund Management Co.	Troy, MI	543,537.30
387 Tisch Investment Advisory	Ann Arbor, MI	534,295.96
388 Brown Financial Advisory	Fairhope, AL	531,287.47
389 Rench & Muir Financial Advisors	Denton, TX	530,189.97
390 Searcy Financial Services	Overland Park, KS	523,661.68
391 Reilly Financial Advisors	La Mesa, CA	518,292.68
392 LifePlan Financial Group	Dayton, OH	513,024.55
393 Phil A. Younker & Associates	Fairbanks, AK	511,363.64
394 Investor Resources	Port Orchard, WA	506,168.05
395 Financial Planning and Info. Services	De Pere, WI	503,662.70
396 Sequoia Financial Advisors	Akron, OH	501,187.65
397 Grimes & Company	Westborough, MA	500,000.00
398 Horowitz & Company	Weston, FL	496,000.00
399 Clifton Gunderson Financial Advisors	Madison, WI	495,524.01
400 Maul Capital Management	Las Vegas, NV	495,057.74