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2011 Top Wealth Manager Rankings



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Rank ▲	Firm Name	Name	Title	Year Business Started	Staff	Minimum AUM for Client	Total Assets	Average AUM Per Client
1	Oxford Financial Group, Ltd.	Jeffrey H. Thomasson	CEO, Managing Director	1984	109	\$2,000,000	\$15,940,605,865	\$17,711,780
2	Convergent Wealth Advisors	Steven D. Lockshin	Chairman, CEO	1994	94	\$10,000,000	\$14,299,304,746	\$42,431,170
3	SCS Financial	Peter Mattoon	CEO	2002	45	\$25,000,000	\$7,800,000,000	\$71,559,630
4	Reynders, McVeigh Capital Management, LLC	Patrick McVeigh	President	2005	14	\$0	\$6,634,000,000	\$30,018,100
5	Welch & Forbes LLC	John H. Emmons, Jr.	President	1838	53	\$1,000,000	\$6,315,507,158	\$10,202,750
6	myCIO Wealth Partners, LLC	David E. Lees	Senior Partner	2005	32	\$2,000,000	\$6,151,538,206	\$14,787,350
7	Edelman Financial Services LLC	Ric Edelman	Chairman, CEO	1987	233	\$50,000	\$5,959,948,872	\$425,711
8	The Mutual Fund Store	Adam Bold	CEO	1996	227	\$50,000	\$5,944,505,997	\$195,363
9	Gresham Partners LLC	Edward F Neild IV	President, CIO	1997	27	\$25,000,000	\$5,877,244,792	\$85,177,460
10	Tiedemann Wealth Management	Craig Smith	President	2009	46	\$20,000,000	\$5,959,949	\$0
11	Johnson Investment Counsel	Timothy E. Johnson	President, CEO	1965	89	\$250,000	\$5,835,940,000	\$2,313,096
12	Ballentine Partners, LLC	Roy Ballentine	President	1997	45	\$3,000,000	\$5,830,171,010	\$53,983,060
13	BBR Partners	Brett Barth, Arthur Black, Evan Roth	Managing Partners	2000	56	\$20,000,000	\$5,391,600,000	\$74,883,330
14	Litman/Gregory Asset Management, LLC	Chris Wheaton	Managing Partner	1987	51	\$3,000,000	\$4,859,269,000	\$18,907,660
15	Aspiriant	Rob Francois	Chief Executive Officer	2008	123	\$5,000,000	\$4,558,693,042	\$10,130,420
16	Federal Street Advisors	John LaPann	President	1991	28	\$20,000,000	\$4,157,791,225	\$48,346,410
17	Innovest Portfolio Solutions	Richard M. Todd	CEO	1996	24	\$5,000,000	\$4,111,000,000	\$24,616,760
18	Beacon Pointe Advisors	Shannon Eusey	President	2002	45	\$100,000	\$4,016,083,968	\$5,397,962

19	Joel Isaacson & Co., LLC	Joel S. Isaacson	President	1993	35	\$1,000,000	\$3,948,671,914	\$5,062,400
20	Luminous Capital, LLC	Mark Sear, David Hou, Alan Zafran, Robert Skinner, Eric Harrison, Kim Ip	Partner	2008	25	\$5,000,000	\$3,800,000,000	\$12,666,666
21	Athena Capital Advisors LLC	Lisette Cooper	CEO	1993	38	\$0	\$3,520,797,133	\$110,024,900
22	Hefren-Tillotson, Inc.	Kim Tillotson Fleming	Chairman, CEO	1948	143	\$100,000	\$3,350,279,029	\$701,042
23	GW & Wade, LLC	Michael Glor	Principal	1986	91	\$0	\$3,320,869,141	\$1,696,052
24	Bahl & Gaynor Investment Counsel, Inc.	William F. Bahl	President	1990	39	\$750,000	\$3,137,413,784	\$6,835,324
25	Lake Street Advisors	Greg Van Slyke	Manager	2003	22	\$0	\$3,065,900,000	\$69,679,540
26	Massey Quick & Co., LLC	Joseph Belfatto	Partner	2004	20	\$5,000,000	\$2,987,601,342	\$22,295,530
27	Buckingham Asset Management	Adam Birenbaum	CEO	1994	100	\$0	\$2,859,000,000	\$1,825,670
28	Ferguson Wellman Capital Management	James Rudd	CEO, President	1975	39	\$2,000,000	\$2,769,688,931	\$5,129,054
29	Altair Advisers	Steven B. Weinstein	President, Chief Investment Officer	2002	48	\$5,000,000	\$2,642,506,443	\$12,348,160
30	Choate Investment Advisors	Todd Millay	Managing Director	1996	10	\$2,000,000	\$2,486,101,679	\$4,735,432
31	Hewins Financial Advisors, LLC	Roger Hewins	President	1999	31	\$400,000	\$2,355,808,600	\$3,031,929
32	Iron Capital Advisors	Charles E Osborne	Managing Director	2003	7	\$0	\$2,343,936,617	\$22,756,660
33	Tolleson Private Wealth Management	Eric W. Bennett	Chairman, CEO	2000	58	\$10,000,000	\$2,275,000,000	\$23,947,360
34	Bingham Osborn & Scarborough, LLC	Kevin Dorwin	Managing Principal	1985	32	\$2,000,000	\$2,200,564,159	\$2,854,169
35	Signature	Randy Webb	President, CEO	1994	29	\$5,000,000	\$2,157,523,149	\$14,101,450
36	Harris SBSB	Greg Sullivan	Managing Director	1991	37	\$1,000,000	\$2,130,000,000	\$2,462,428
37	Vogel Consulting	Rhona E. Vogel	Founder, CEO	1993	28	\$10,000,000	\$2,124,000,000	\$42,480,000
38	Homrich Berg	Andy Berg	CEO	1989	55	\$0	\$2,099,260,694	\$2,799,014
39	True North Advisors LLC	Scott Wood, Mark Gehlbach	Founding Principals	2000	26	\$1,000,000	\$2,032,000,000	\$4,545,861
40	Mill Creek Capital Advisors, LLC	Richard Stevens	CEO	2006	21	\$5,000,000	\$2,001,541,439	\$25,019,260
41	Arlington Family Office	Kenneth Polk	CEO, Managing Member	1998	28	\$20,000,000	\$2,000,000,000	\$43,478,260
42	RMB Capital Management	Richard M. Burrige, Jr.	CEO, CIO	2005	43	\$1,000,000	\$1,986,200,000	\$2,323,041
43	Savant Capital Management Inc	Brent Brodeski	CEO	1986	62	\$500,000	\$1,949,854,290	\$931,607
44	South Texas Money Management	Jeanie Wyatt	CEO	2000	55	\$500,000	\$1,927,654,347	\$1,421,574
45	Creative Planning, Inc.	Peter Mallouk	President & Chief Investment Officer	1982	19	\$0	\$1,917,531,401	\$1,127,960
46	Highmount Capital	Maarten R van Hengel	Partner	2002	43	\$3,000,000	\$1,877,222,713	\$22,347,880
47	Kovitz Investment Group, LLC	Mitchell A. Kovitz	Principal, Portfolio Manager	2003	32	\$500,000	\$1,768,000,000	\$1,953,591

48	Balasa Dinverno Foltz LLC	Armond A. Dinverno	President, Co-CEO	1986	31	\$1,000,000	\$1,746,337,884	\$2,204,972
49	Financial Management Partners	Katherine B. Lintz	President, CEO	1990	21	\$0	\$1,723,056,964	\$11,564,14
50	The MDE Group	Mitchell D. Eichen	CEO	1987	26	\$3,000,000	\$1,718,265,721	\$9,287,923
51	Manchester Capital Management LLC	Ted Cronin	CEO, CIO	1993	22	\$10,000,000	\$1,700,250,798	\$11,335,00
52	Brighton Jones, LLC	Jon Jones	Co-CEO	1999	36	\$0	\$1,685,000,000	\$3,143,657
53	Pathstone Family Office	Steve Braverman	Co-Founder, Managing Director	2010	25	\$10,000,000	\$1,683,588,798	\$42,089,72
54	Halbert Hargrove	Russ Hill	CEO	1989	30	\$1,000,000	\$1,664,438,437	\$4,224,463
55	Dowling & Yahnke, LLC	Dale Yahnke	President	1991	23	\$1,000,000	\$1,656,048,312	\$2,250,066
56	Bartholomew & Company, Inc.	Thomas J. Bartholomew	President	1994	20	\$0	\$1,642,000,000	\$1,665,314
57	JMG Financial Group, Ltd.	Marita A. Sullivan	CEO	1984	45	\$1,000,000	\$1,613,915,700	\$3,676,346
58	Badgley Phelps Investment Managers	Steven C. Phelps	President	1966	27	\$2,500,000	\$1,583,235,721	\$3,833,501
59	American Portfolios Advisors, Inc.	Lon T. Dolber	CEO	2001	413	\$50,000	\$1,514,717,130	\$168,302
60	Telemus Capital Partners	Jim Robinson	CEO, CIO	2005	51	\$1,000,000	\$1,511,442,255	\$1,991,360
61	WMS Partners, LLC	Timothy W. Chase	Managing Partner	1992	27	\$5,000,000	\$1,497,514,556	\$6,292,078
62	Budros, Ruhlin & Roe, Inc.	Peggy M. Ruhlin	Managing Principal	1979	42	\$500,000	\$1,473,873,596	\$2,641,351
63	RCL Advisors, LLC	William Cafero	Partner	2006	9	\$2,000,000	\$1,403,266,347	\$13,238,36
64	WTAS LLC	Mark Vorsatz	CEO	2002	29	\$0	\$1,359,806,803	\$9,998,579
65	Baker Tilly Investment Advisors, LLC	Steven Parish	President	1997	36	\$250,000	\$1,308,230,613	\$1,428,199
66	Hillview Capital Advisors, LLC	Jonathan J. Hochberg	President	1999	20	\$10,000,000	\$1,242,430,076	\$15,726,96
67	Paragon Investment Management Inc.	Shari J Burns	President	1991	15	\$1,000,000	\$1,229,309,915	\$4,454,021
68	SignatureFD, LLC	Jeffrey S. Peller	Managing Director	1997	26	\$2,000,000	\$1,175,020,589	\$3,108,520
69	Circle Wealth Management	Maria L. Kattan Chrin	Managing Partner	2006	11	\$50,000,000	\$1,129,646,729	\$94,137,22
70	Oakwood Capital Management LLC	Bruce A. Mandel	President, CEO	1998	17	\$1,000,000	\$1,114,700,000	\$3,070,799
71	Financial Clarity, Inc.	Stanford Young	Founder & President	1992	10	\$30,000,000	\$1,111,613,000	\$35,858,48
72	HbK Sorce Financial LLC	Christopher Allegretti	CEO	2001	47	\$0	\$1,102,248,755	\$286,001
73	Moss Adams Wealth Advisors LLC	Rebecca Pomeroy	CEO	1988	37	\$0	\$1,101,336,005	\$1,261,553
74	Wipfli Hewins Investment Advisors, LLC	Roger Hewins	President	1999	27	\$0	\$1,080,821,800	\$1,660,249
75	Gerstein Fisher	Gregg S. Fisher	President and Chief Investment Officer	1993	27	\$0	\$1,074,000,000	\$1,534,286
76	RiverPoint Capital Management	Valerie L. Newell	Chairman & Managing Director	1995	17	\$1,000,000	\$1,071,003,092	\$3,367,934
77	Morton Capital Management	Lon Morton	President and CEO	1983	21	\$250,000	\$1,064,844,198	\$1,608,526
78	Palisades Hudson Asset	Larry M.	President	1997	18	\$500,000	\$1,052,765,574	\$12,385,47

	Management, L.P.	Elkin						
79	Deglin Kenealy	Charles Osbone	President	1937	25	\$500,000	\$1,040,467,659	\$2,890,188
80	Mainstay Capital Management, LLC	David Kudla	CEO & Chief Investment Strategist	2000	20	\$200,000	\$1,022,744,283	\$353,768
81	Lepercq Lynx Investment Advisory, LLC	Peter Tanous	President	1992	15	\$2,000,000	\$1,022,390,786	\$15,729,081
82	Grimes & Company, Inc.	Timothy J. Grimes	President	1986	16	\$500,000	\$1,006,149,155	\$775,153
83	Vantage Investment Partners, LLC	John G. Woolway	Chief Investment Officer	2003	3	\$350,000	\$1,005,508,626	\$14,786,891
84	TCI Wealth Advisors, Inc.	Robert Swift	CEO	1990	27	\$500,000	\$981,361,562	\$943,617
85	EP Wealth Advisors	Derek H. Holman	Managing Director	1982	22	\$500,000	\$965,000,000	\$901,869
86	Modera Wealth Management, LLC	Thomas Orecchio	President	1983	30	\$1,000,000	\$964,445,639	\$1,880,011
87	Alan Cohn	Alan Cohn, Stephen Cohn	Co-Presidents	1989	19	\$500,000	\$957,684,486	\$1,903,945
88	Truepoint Inc.	Michael J. Chasnoff	Founder & CEO	1990	23	\$500,000	\$932,774,000	\$2,077,448
89	Edge Advisors	William Maner	Managing Partner	2006	20	\$3,000,000	\$921,622,533	\$18,071,031
90	Algonquin Advisors LLC	George Hubbard	Managing Partner	1998	10	\$5,000,000	\$900,700,000	\$50,038,881
91	Resource Consulting Group	Michael H. Davis	CEO	1988	19	\$1,000,000	\$892,220,549	\$2,906,256
92	West Financial Services Inc.	Glen Bucu	President & Chief Investment Officer	1982	20	\$1,000,000	\$888,234,420	\$1,718,055
93	Quest Capital Management, Inc.	Kalita Beck Blessing	President and Wealth Manager	1987	28	\$1,000,000	\$886,038,170	\$1,678,103
94	Lee Financial Corporation	Dana Pingenot	President	1975	59	\$1,000,000	\$867,000,000	\$2,842,623
95	Carlson Capital Management	Gregory A. Carlson	Principal/President	1986	21	\$1,000,000	\$837,000,000	\$1,594,286
96	SYM Financial Advisors	Jerry Yeager	CEO	1968	23	\$300,000	\$826,358,847	\$1,412,579
97	Mt. Eden Investment Advisors, LLC	Keith McWilliams	CEO, CIO	2004	17	\$2,000,000	\$812,672,326	\$7,890,023
98	Brightworth	Chris Dardaman	CEO	1997	18	\$1,000,000	\$803,573,400	\$2,219,816
99	Legacy Wealth Management	James J. Isaacs	President and CEO	1982	24	\$500,000	\$782,463,481	\$1,286,947
100	Strategic Wealth Partners LLC	David Copeland, Neal Price	Principals	2008	8	\$1,000,000	\$778,707,875	\$2,561,539

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