

Top Independent Advisors

BARRON'S

September 16, 2019



WHAT PRICE GROWTH?

Independent advisory firms are growing by leaps and bounds. How fast is too fast?

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The 2019 Top 100 Independent Advisors

Here are America's top independent financial advisors, as identified by *Barron's*. The ranking reflects the volume of assets overseen by the advisors and their teams, revenues generated for the firms, and the quality of the advisors' practices. The scoring system assigns a top score of 100 and rates the rest by comparing them with the top-ranked advisor. A ranking of "N" indicates the advisor wasn't ranked in the specified year. HNW=high net worth; UHNW=ultra-high net worth.

1. Spuds Powell

Kayne Anderson Rudnick Inv. Mgmt., Los Angeles
2018 Rank: 1
Client Types: HNW, UHNW, Foundations
Team Total Assets (mil): \$29,528
Typical Acct Size (mil): \$8.5
Typical Net Worth (mil): \$20

2. Charles C. Zhang

Zhang Financial, Portage, Mich.
2018 Rank: 6
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$3,503
Typical Acct Size (mil): \$2
Typical Net Worth (mil): \$3

3. Kimberlee Orth

Ameriprise Financial, Wilmington, Del.
2018 Rank: 11
Client Types: Retail, HNW, UHNW, Institutional
Team Total Assets (mil): \$2,622
Typical Acct Size (mil): \$5.69
Typical Net Worth (mil): \$14.38

4. Stephan Cassaday

Cassaday & Company, Mclean, Va.
2018 Rank: 12
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$3,240
Typical Acct Size (mil): \$1.5
Typical Net Worth (mil): \$2

5. Edward Cronin

Manchester Capital Mgmt., Montecito, Calif.
2018 Rank: 8
Client Types: HNW, UHNW, Foundations
Team Total Assets (mil): \$3,660
Typical Acct Size (mil): \$25
Typical Net Worth (mil): \$60

6. Richard Saperstein

Treasury Partners at HighTower, New York
2018 Rank: 10
Client Types: HNW, UHNW, Institutional
Team Total Assets (mil): \$14,857
Typical Acct Size (mil): \$20
Typical Net Worth (mil): \$25

7. Seth Finkel

Neuberger Berman, New York
2018 Rank: N
Client Types: HNW, UHNW, Institutional
Team Total Assets (mil): \$2,966
Typical Acct Size (mil): \$10
Typical Net Worth (mil): \$20

8. Steven Hefter

HLM Capital, Highland Park, Ill.
2018 Rank: N
Client Types: HNW, UHNW
Team Total Assets (mil): \$5,768
Typical Acct Size (mil): \$15
Typical Net Worth (mil): \$20

9. Valerie Newell

Mariner Wealth Advisors, Cincinnati
2018 Rank: 15
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$3,168
Typical Acct Size (mil): \$3
Typical Net Worth (mil): \$7.5

10. Stephanie J. Stiefel

Neuberger Berman, New York
2018 Rank: N
Client Types: HNW, UHNW, Institutional
Team Total Assets (mil): \$2,613
Typical Acct Size (mil): \$15
Typical Net Worth (mil): \$45

11. Jon Goldstein

First Republic Investment Mgmt., Palo Alto, Calif.
2018 Rank: 7
Client Types: HNW, UHNW
Team Total Assets (mil): \$5,140
Typical Acct Size (mil): \$50
Typical Net Worth (mil): \$100

12. Erik Morgan

Freestone Capital Mgmt., Seattle
2018 Rank: 18
Client Types: HNW, UHNW
Team Total Assets (mil): \$4,680
Typical Acct Size (mil): \$4.41
Typical Net Worth (mil): \$8.31

13. Thomas Moran

Moran Wealth Mgmt., Naples, Fla.
2018 Rank: N
Client Types: Retail, HNW, UHNW, Institutional
Team Total Assets (mil): \$3,484
Typical Acct Size (mil): \$5
Typical Net Worth (mil): \$25

14. Paul Tramontano

First Republic Investment Mgmt., Greenwich, Conn.
2018 Rank: 17
Client Types: UHNW, Foundations
Team Total Assets (mil): \$3,168
Typical Acct Size (mil): \$40
Typical Net Worth (mil): \$100

15. Richard Joyner

Tolleson Wealth Management, Dallas
2018 Rank: 19
Client Types: HNW, UHNW, Foundations
Team Total Assets (mil): \$6,190
Typical Acct Size (mil): \$40
Typical Net Worth (mil): \$87

16. David Kudla

Mainstay Capital Management, Grand Blanc, Mich.
2018 Rank: 20
Client Types: Retail, HNW, UHNW, Institutional
Team Total Assets (mil): \$2,566
Typical Acct Size (mil): \$0.75
Typical Net Worth (mil): \$3

17. John Krambeer

Camden Capital, El Segundo, Calif.
2018 Rank: 41
Client Types: Retail, HNW, UHNW, Foundations
Team Total Assets (mil): \$4,579
Typical Acct Size (mil): \$15
Typical Net Worth (mil): \$50

18. Dagny Maidman

First Republic Investment Mgmt., San Francisco
2018 Rank: 29
Client Types: HNW, UHNW
Team Total Assets (mil): \$2,800
Typical Acct Size (mil): \$50
Typical Net Worth (mil): \$500

19. Kevin Grimes

Grimes & Company, Westborough, Mass.
2018 Rank: 25
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$2,646
Typical Acct Size (mil): \$3
Typical Net Worth (mil): \$10

20. Dale Yahnke

Dowling & Yahnke, San Diego
2018 Rank: 27
Client Types: HNW, UHNW
Team Total Assets (mil): \$4,356
Typical Acct Size (mil): \$4.16
Typical Net Worth (mil): \$30

21. William Peterson

Neuberger Berman, New York
2018 Rank: N
Client Types: HNW, UHNW
Team Total Assets (mil): \$1,814
Typical Acct Size (mil): \$6.5
Typical Net Worth (mil): \$13

22. Susan Kaplan

Kaplan Financial Svcs., Newton, Mass.
2018 Rank: 26
Client Types: HNW, UHNW
Team Total Assets (mil): \$2,051
Typical Acct Size (mil): \$3.5
Typical Net Worth (mil): \$11

23. Jon Jones

Brighton Jones, Seattle
2018 Rank: 32
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$6,127
Typical Acct Size (mil): \$3
Typical Net Worth (mil): \$5

24. Robert Balentine

Balentine, Atlanta
2018 Rank: 24
Client Types: HNW, UHNW, Foundations, Institutional
Team Total Assets (mil): \$3,120
Typical Acct Size (mil): \$17.43
Typical Net Worth (mil): \$25

25. Charles Brighton

Brighton Jones, Seattle
2018 Rank: 31
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$6,127
Typical Acct Size (mil): \$3
Typical Net Worth (mil): \$5

26. Steven Weinstein

Altair Advisers, Chicago
2018 Rank: 28
Client Types: HNW, UHNW
Team Total Assets (mil): \$4,902
Typical Acct Size (mil): \$15
Typical Net Worth (mil): \$30

27. Daniel Wiener

Adviser Investments, Newton, Mass.
2018 Rank: 30
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$5,974
Typical Acct Size (mil): \$1.49
Typical Net Worth (mil): \$2.5

28. David Mabie

Chicago Capital, Chicago
2018 Rank: N
Client Types: HNW, UHNW
Team Total Assets (mil): \$1,901
Typical Acct Size (mil): \$5
Typical Net Worth (mil): \$5

29. Holly Newman Kroft

Neuberger Berman, New York
2018 Rank: N
Client Types: HNW, UHNW, Endowments
Team Total Assets (mil): \$1,770
Typical Acct Size (mil): \$7
Typical Net Worth (mil): \$15

30. Grant Rawdin

Wescott Financial Advisory Group, Philadelphia
2018 Rank: 35
Client Types: Retail, HNW, UHNW, Foundations, Institutional
Team Total Assets (mil): \$2,223
Typical Acct Size (mil): \$8
Typical Net Worth (mil): \$22

31. Brenna Saunders

Creative Planning, Overland Park, Kan.
2018 Rank: 54
Client Types: HNW, UHNW
Team Total Assets (mil): \$1,918
Typical Acct Size (mil): \$2.97
Typical Net Worth (mil): \$13.03

32. Virginia Guy

Neuberger Berman Investment Advisers, New York
2018 Rank: N
Client Types: HNW, UHNW, Foundations
Team Total Assets (mil): \$1,420
Typical Acct Size (mil): \$7
Typical Net Worth (mil): \$20

33. Frank Marzano

GM Advisory Group, Melville, N.Y.
2018 Rank: 59
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$2,140
Typical Acct Size (mil): \$20
Typical Net Worth (mil): \$30

34. Frank Reilly

Reilly Financial Advisors, La Mesa, Calif.
2018 Rank: 40
Client Types: Retail, HNW, Institutional
Team Total Assets (mil): \$2,257
Typical Acct Size (mil): \$2
Typical Net Worth (mil): \$6

35. Randall Linde

AGP Wealth Advisors, Renton, Wash.
2018 Rank: 49
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$2,082
Typical Acct Size (mil): \$0.88
Typical Net Worth (mil): \$2.5

36. Paul West

Carson Wealth Management Group, Omaha, Neb.
2018 Rank: 57
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$5,403
Typical Acct Size (mil): \$5
Typical Net Worth (mil): \$10

37. Jeffrey Grinspoon

VWG Wealth Management at HighTower, Vienna, Va.
2018 Rank: 63
Client Types: HNW, UHNW, Institutional
Team Total Assets (mil): \$2,120
Typical Acct Size (mil): \$5
Typical Net Worth (mil): \$7

38. Gerard Klingman

Klingman & Associates/Raymond James, New York
2018 Rank: 46
Client Types: HNW, UHNW
Team Total Assets (mil): \$2,336
Typical Acct Size (mil): \$10
Typical Net Worth (mil): \$15

39. James B. Stack

Stack Financial Management, Whitefish, Mont.
2018 Rank: 43
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$1,311
Typical Acct Size (mil): \$1.5
Typical Net Worth (mil): \$5

40. Laila Pence

Pence Wealth Management, Newport Beach, Calif.
2018 Rank: 38
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$1,738
Typical Acct Size (mil): \$2
Typical Net Worth (mil): \$5

41. Gary Ran

Telemus Capital, Southfield, Mich.
2018 Rank: 50
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$2,810
Typical Acct Size (mil): \$2.64
Typical Net Worth (mil): \$8

42. Glenn Degenars

First Republic Investment Mgmt., New York
2018 Rank: 76
Client Types: HNW, UHNW, Endowments, Institutional
Team Total Assets (mil): \$1,854
Typical Acct Size (mil): \$20
Typical Net Worth (mil): \$37.5

43. Alex Shahidi

Advanced Research Inv. Solutions (ARIS), Los Angeles
2018 Rank: 44
Client Types: UHNW, Foundations, Institutional
Team Total Assets (mil): \$11,372
Typical Acct Size (mil): \$20
Typical Net Worth (mil): \$25

44. Jonathan Kuttin

Kuttin Wealth Mgmt., Hauppauge, N.Y.
2018 Rank: 51
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$1,944
Typical Acct Size (mil): \$1
Typical Net Worth (mil): \$3.9

45. Molly Rothove

Creative Planning, Overland Park, Kan.
2018 Rank: 62
Client Types: HNW, UHNW
Team Total Assets (mil): \$1,379
Typical Acct Size (mil): \$1.51
Typical Net Worth (mil): \$7.44

46. Richard S. Brown

JNBA Financial Advisors, Minneapolis
2018 Rank: 47
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$1,518
Typical Acct Size (mil): \$1.5
Typical Net Worth (mil): \$2

47. John Henry

OBS Financial, Perrysburg, Ohio
2018 Rank: 45
Client Types: Retail, HNW, Institutional
Team Total Assets (mil): \$1,950
Typical Acct Size (mil): \$0.13
Typical Net Worth (mil): \$0.19

48. Daniel Roe

Budros, Ruhlín & Roe, Columbus, Ohio
2018 Rank: 55
Client Types: HNW, UHNW, Institutional
Team Total Assets (mil): \$2,808
Typical Acct Size (mil): \$4.8
Typical Net Worth (mil): \$6

49. Randy Carver

Raymond James, Mentor, Ohio
2018 Rank: 61
Client Types: Retail, HNW
Team Total Assets (mil): \$1,581
Typical Acct Size (mil): \$1
Typical Net Worth (mil): \$1.4

50. Shawn Parker

Ameriprise Financial, Schaumburg, Ill.
2018 Rank: 64
Client Types: Retail, HNW, UHNW, Institutional
Team Total Assets (mil): \$2,250
Typical Acct Size (mil): \$2.75
Typical Net Worth (mil): \$5

51. Andy Berg

Homrich Berg, Atlanta
2018 Rank: 78
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$6,109
Typical Acct Size (mil): \$3.5
Typical Net Worth (mil): \$7

52. Jim Berliner

Westmount Asset Mgmt., Los Angeles
2018 Rank: N
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$3,358
Typical Acct Size (mil): \$3.5
Typical Net Worth (mil): \$9

53. Charles Simmons

Ameriprise Financial, Metairie, La.
2018 Rank: 52
Client Types: Retail, HNW
Team Total Assets (mil): \$2,625
Typical Acct Size (mil): \$0.75
Typical Net Worth (mil): \$1.8

54. Stewart Mather

The Mather Group, Chicago
2018 Rank: 85
Client Types: HNW, UHNW
Team Total Assets (mil): \$4,305
Typical Acct Size (mil): \$25
Typical Net Worth (mil): \$35

55. Kevin Myeroff

NCA Financial Planners, Cleveland, Ohio
2018 Rank: 53
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$1,749
Typical Acct Size (mil): \$2.5
Typical Net Worth (mil): \$3

56. Lewis Altfest

Altfest Personal Wealth Mgmt., New York
2018 Rank: 65
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$1,340
Typical Acct Size (mil): \$2
Typical Net Worth (mil): \$5

57. Jeffrey Fratarcangeli

Fratarcangeli Wealth Mgmt., Birmingham, Mich.
2018 Rank: N
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$1,750
Typical Acct Size (mil): \$5
Typical Net Worth (mil): \$15

58. Thomas Myers

Bordeaux Wealth Advisors, Menlo Park, Calif.
2018 Rank: 56
Client Types: HNW, UHNW
Team Total Assets (mil): \$2,272
Typical Acct Size (mil): \$20
Typical Net Worth (mil): \$30

59. Keith Webster

First Republic Investment Management, Los Angeles
2018 Rank: N
Client Types: HNW, UHNW, Foundations
Team Total Assets (mil): \$1,940
Typical Acct Size (mil): \$10
Typical Net Worth (mil): \$20

60. Jordan Waxman

HSW Advisors at HighTower, New York
2018 Rank: 58
Client Types: HNW, UHNW
Team Total Assets (mil): \$2,130
Typical Acct Size (mil): \$25
Typical Net Worth (mil): \$50

61. Lawrence Hood

Pacific Portfolio Consulting, Seattle
2018 Rank: 68
Client Types: Retail, HNW, UHNW, Institutional
Team Total Assets (mil): \$3,796
Typical Acct Size (mil): \$10
Typical Net Worth (mil): \$18

62. Michael Chasnoff

Truepoint Wealth Counsel, Cincinnati
2018 Rank: 70
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$3,119
Typical Acct Size (mil): \$3
Typical Net Worth (mil): \$8

63. Charles Bean

Heritage Financial Services, Westwood, Mass.
2018 Rank: 60
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$1,521
Typical Acct Size (mil): \$3
Typical Net Worth (mil): \$5

64. Darrell Pennington

Pennington Wealth Mgmt., Houston
2018 Rank: 91
Client Types: Retail, HNW
Team Total Assets (mil): \$1,255
Typical Acct Size (mil): \$1.5
Typical Net Worth (mil): \$2.5

65. Wes Moss

Capital Investment Advisors, Atlanta
2018 Rank: N
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$2,561
Typical Acct Size (mil): \$1.5
Typical Net Worth (mil): \$2.5

66. Van Percy

Van Percy's Wealth Services Team/Raymond James, Midland, Texas
2018 Rank: 90
Client Types: Retail, HNW, UHNW, Institutional
Team Total Assets (mil): \$1,848
Typical Acct Size (mil): \$3
Typical Net Worth (mil): \$10

67. Scott Tiras

Tiras Wealth Management, Houston
2018 Rank: 83
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$2,203
Typical Acct Size (mil): \$4
Typical Net Worth (mil): \$5

68. Erin Scannell

Ameriprise Financial, Mercer Island, Wash.
2018 Rank: 67
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$2,144
Typical Acct Size (mil): \$0.5
Typical Net Worth (mil): \$3

69. Ryan Swartz

Creative Planning, Omaha, Neb.
2018 Rank: 77
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$1,968
Typical Acct Size (mil): \$0.7
Typical Net Worth (mil): \$2.48

70. Mark Delfino

HoyleCohen, San Diego
2018 Rank: 72
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$2,015
Typical Acct Size (mil): \$2
Typical Net Worth (mil): \$7

71. Randy Peterson

First Republic Investment Management, San Francisco
2018 Rank: 87
Client Types: Retail, HNW, UHNW, Institutional
Team Total Assets (mil): \$1,433
Typical Acct Size (mil): \$8.7
Typical Net Worth (mil): \$15

72. Steven Check

Check Capital Management, Costa Mesa, Calif.
2018 Rank: 69
Client Types: Retail, HNW, UHNW
Team Total Assets (mil): \$1,459
Typical Acct Size (mil): \$1
Typical Net Worth (mil): \$3

73. Joseph Jacques

Jacques Financial, Rockville, Md.
2018 Rank: 84
Client Types: Retail, HNW
Team Total Assets (mil): \$986
Typical Acct Size (mil): \$0.98
Typical Net Worth (mil): \$2.38

74. Pamela Rosenau

The Rosenau Group at HighTower, Aspen, Colo.
2018 Rank: N
Client Types: HNW, UHNW
Team Total Assets (mil): \$1,169
Typical Acct Size (mil): \$10
Typical Net Worth (mil): \$30

75. Mark Orgel*Orgel Wealth Mgmt., Altoona, Wis.***2018 Rank:** 80**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets** (mil): \$4,653**Typical Acct Size** (mil): \$2.04**Typical Net Worth** (mil): \$6**76. Daniel Wilson***Ameriprise Financial, Auburndale, Mass.***2018 Rank:** N**Client Types:** Retail, HNW**Team Total Assets** (mil): \$2,155**Typical Acct Size** (mil): \$0.5**Typical Net Worth** (mil): \$5**77. Malcolm Cowen***Cornerstone Advisors Asset Mgmt., Bethlehem, Pa.***2018 Rank:** N**Client Types:** HNW, UHNW, Foundations, Endowments, Institutional**Team Total Assets** (mil): \$5,807**Typical Acct Size** (mil): \$45**Typical Net Worth** (mil): \$70**78. Matthew Young***Richard C. Young & Co., Newport, R.I.***2018 Rank:** 86**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,103**Typical Acct Size** (mil): \$1.71**Typical Net Worth** (mil): \$5**79. Malcolm Makin***Raymond James Financial Svcs., Westerly, R.I.***2018 Rank:** 93**Client Types:** Retail, HNW**Team Total Assets** (mil): \$1,309**Typical Acct Size** (mil): \$1.5**Typical Net Worth** (mil): \$3**80. Duncan Rolph***Miracle Mile Advisors, Los Angeles***2018 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,845**Typical Acct Size** (mil): \$4.2**Typical Net Worth** (mil): \$13**81. Wally Obermeyer***Obermeyer Wood Inv. Counsel, Aspen, Colo.***2018 Rank:** 79**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,600**Typical Acct Size** (mil): \$3**Typical Net Worth** (mil): \$10**82. Matthew Dillig***The Dillig Bowen Group at HighTower, Chicago***2018 Rank:** 92**Client Types:** HNW, UHNW, Foundations**Team Total Assets** (mil): \$1,600**Typical Acct Size** (mil): \$35**Typical Net Worth** (mil): \$50**83. Gail Reid***Ameriprise Financial, Glendale, Calif.***2018 Rank:** N**Client Types:** Retail, HNW, Foundations**Team Total Assets** (mil): \$1,586**Typical Acct Size** (mil): \$2.5**Typical Net Worth** (mil): \$4**84. Christopher Cordaro***RegentAtlantic, Morristown, N.J.***2018 Rank:** N**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$3,990**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$15**85. E. Geoffrey Sella***SPC Financial/Raymond James, Rockville, Md.***2018 Rank:** N**Client Types:** Retail, HNW**Team Total Assets** (mil): \$840**Typical Acct Size** (mil): \$0.84**Typical Net Worth** (mil): \$1.58**86. Leo Marzen***Bridgewater Advisors, New York***2018 Rank:** 95**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$1,530**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$7.5**87. Ken Moraif***Retirement Planners of America, Plano, Texas***2018 Rank:** 33**Client Types:** Retail, HNW**Team Total Assets** (mil): \$4,600**Typical Acct Size** (mil): \$2**Typical Net Worth** (mil): \$2.7**88. Sam Schoner***First Republic Inv. Mgmt., San Francisco***2018 Rank:** N**Client Types:** HNW, UHNW, Endowments, Institutional**Team Total Assets** (mil): \$1,814**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$10**89. Walter "JR" Gondeck***The Lerner Group at HighTower, Deerfield, Ill.***2018 Rank:** 89**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,500**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$10**90. James Meredith***Hefren-Tillotson, Pittsburgh, Pa.***2018 Rank:** 97**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets** (mil): \$1,720**Typical Acct Size** (mil): \$2**Typical Net Worth** (mil): \$5.5**91. Diane Compardo***Moneta, Clayton, Mo.***2018 Rank:** N**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$1,646**Typical Acct Size** (mil): \$15**Typical Net Worth** (mil): \$18**92. Deb Wetherby***Wetherby Asset Mgmt., San Francisco***2018 Rank:** 98**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$5,306**Typical Acct Size** (mil): \$32.82**Typical Net Worth** (mil): \$45**93. Jason Babb***First Republic Inv. Mgmt., New York***2018 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,064**Typical Acct Size** (mil): \$5**Typical Net Worth** (mil): \$5**94. William Cafero***RCL Advisors, New York***2018 Rank:** 73**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$2,114**Typical Acct Size** (mil): \$10**Typical Net Worth** (mil): \$23**95. Ronald Weiner***RDM Financial Group at HighTower, Westport, Conn.***2018 Rank:** N**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets** (mil): \$876**Typical Acct Size** (mil): \$3.5**Typical Net Worth** (mil): \$7**96. David Bahnsen***The Bahnsen Group at HighTower, Newport Beach, Calif.***2018 Rank:** 100**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets** (mil): \$1,730**Typical Acct Size** (mil): \$7.5**Typical Net Worth** (mil): \$10**97. Randy Garcia***The Investment Counsel Company, Las Vegas***2018 Rank:** N**Client Types:** Retail, HNW, UHNW, Institutional**Team Total Assets** (mil): \$1,212**Typical Acct Size** (mil): \$4.9**Typical Net Worth** (mil): \$10**98. Dalal Salomon***Salomon & Ludwin, Richmond, Va.***2018 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$1,110**Typical Acct Size** (mil): \$4**Typical Net Worth** (mil): \$7**99. Jay Beebe***Creative Planning, Overland Park, Kan.***2018 Rank:** N**Client Types:** Retail, HNW, UHNW**Team Total Assets** (mil): \$937**Typical Acct Size** (mil): \$0.73**Typical Net Worth** (mil): \$2.44**100. Jessica Culpepper***Creative Planning, Overland Park, Kan.***2018 Rank:** 75**Client Types:** HNW, UHNW**Team Total Assets** (mil): \$1,131**Typical Acct Size** (mil): \$1.86**Typical Net Worth** (mil): \$11.23

N=Not Ranked Note: For more information on *Barron's* Top Advisors, contact Matt Barthel at matthew.barthel@barrons.com. *Barron's* publishes four individual financial advisor rankings each year: The Top 100, The Top 100 Women, The Top 100 Independents, and the Top 1,200, which is a state-by-state list. The process of being ranked in *Barron's* starts with filling out a detailed online survey. For information about our nominations process and the online survey, please contact Jennifer Pedone, manager of FA Research: Jennifer.Pedone@barrons.com.

BARRON'S

Looking for a top advisor?

Find more information on the Top Independent Advisors and over 1,200 other ranked advisors and firms at [barrons.com/directory](https://www.barrons.com/directory)

The Top 50 RIA Firms

The largest independent advisory firms grew by more than 40% last year. With M&A only increasing, that growth is unlikely to slow anytime soon. N=not ranked.

RANK		Firm	Location	Top Executives	Clients	Advisors	Offices	States
2019	2018							
1.	1.	Edelman Financial Engines	Sunnyvale, Calif.	Lawrence Raffone, Christopher Jones, Mario Ramos	1,210,000	310	178	49
2.	N	Creative Planning	Overland Park, Kan.	Peter Mallouk, Jim Williams, Molly Rothove	27,838	286	29	16
3.	6.	Private Advisor Group	Morristown, N.J.	John Hyland, Pat Sullivan	55,033	640	286	35
4.	3.	Mariner Wealth Advisors	Overland Park, Kan.	Marty Bicknell, Cheryl Bicknell, Katrina Scott	17,708	299	35	22
5.	4.	Moneta Group Investment Advisors	Clayton, Mo.	Eric Kittner, Keith Bowles, Bill Hornbarger	4,660	105	2	1
6.	16.	Mercer Advisors	Denver	Dave Welling, Loren Pierson, Karsten Voermann	11,000	87	43	21
7.	5.	Silvercrest Asset Mgmt Group	New York	Richard R. Hough III, David J. Campbell, Scott A. Gerard	738	31	7	5
8.	8.	BBR Partners	New York	Brett Barth, Evan Roth, Mike Anson	140	30	4	3
9.	24.	Carson Group	Omaha, Neb.	Ron Carson, Aaron Schaben, Teri Shepherd	14,910	159	108	40
10.	10.	Buckingham Strategic Wealth	Saint Louis, Mo.	Adam Birenbaum, David Levin, Justin Ferri	8,956	166	35	20
11.	9.	Tiedemann Advisors	New York	Michael Tiedemann, Craig Smith, Kevin Moran	414	37	9	9
12.	N	Wealth Enhancement Advisory Services	Plymouth, Minn.	Jeff Dekko, Jim Cahn, John Wernz	17,000	85	26	11
13.	13.	Aspiriant	Los Angeles	Rob Francais, Bret Magpiong, John Allen	1,665	89	11	7
14.	N	1919 Investment Counsel	New York	Harry O'Mealia, Peggy Pasquarella, Charlie King	2,186	26	8	7
15.	22.	The Colony Group	Boston	Michael J. Nathanson, Ron Rubin, Gina Bradley	4,018	89	13	6
16.	26.	Stratos Wealth Partners	Beachwood, Ohio	Jeffrey Concepcion, Nancy Andrefsky, Matthew Dunn	12,550	312	87	24
17.	N	Chevy Chase Trust	Bethesda, Md.	Peter M. Welber, Amy Raskin, Leslie Smith	1,400	34	1	1
18.	21.	Evercore Wealth Management	New York	Jeff Maurer, Chris Zander, Jay Springer	600	48	5	4
19.	20.	Johnson Investment Counsel	Cincinnati	Jason O. Jackman, Bret H. Parrish, Holli J. Alexander	3,948	34	6	2
20.	36.	Beacon Pointe Advisors	Newport Beach, Calif.	Shannon Eusey, Matthew Cooper	3,850	100	14	6
21.	32.	Churchill Management Group	Los Angeles	Fred A. Fern, Randy C. Conner, Eileen A. Holmes	6,322	42	41	11
22.	N	GW & Wade	Wellesley, Mass.	Roger W. Wade, Timothy Pinch	2,440	20	4	3
23.	18.	Pathstone	Englewood, N.J.	Steve Braverman, Allan Zachariah, Matthew Fleissig	325	57	7	7
24.	35.	Savant Capital Management	Rockford, Ill.	Brent R. Brodeski, Douglas A. Moffitt, Steven R. Parish	4,910	45	15	4
25.	N	RSM US Wealth Management	Minneapolis	Joseph Adams, Dave Scudder, Maria Daley	3,763	39	23	13
26.	39.	MAI Capital Management	Cleveland, Ohio	Richard J. Buoncore, James D. Kacic, Mark H. Summers	1,559	49	7	5
27.	N	myCIO Wealth Partners	Philadelphia	David E. Lees, James J. Biles, Paul J. Bracaglia	758	18	1	1
28.	31.	Douglas C. Lane & Associates	New York	Sarat Sethi, Ned Dewees	1,195	10	1	1
29.	28.	RMB Capital	Chicago	Richard M. Burrige Jr., Frederick Paulman, Walter Clark	2,746	27	18	14
30.	34.	Welch & Forbes	Boston	Kurt Walter, Benjamin J. Williams Jr., Adrienne G. Silberman	764	11	1	1
31.	N	Baker Street Advisors	San Francisco	Jeff Colin, Michael van den Akker, Chris Wilkens	340	6	1	1
32.	N	EP Wealth Advisors	Torrance, Calif.	Patrick Goshtigian, Brian Parker, Derek Holman	4,200	44	11	4
33.	N	Bronfman Rothschild	Rockville, Md.	Mike LaMena, Eric Sontag, Howard Sontag	2,017	65	10	6
34.	N	Allworth Financial	Sacramento	Scott Hanson, Pat McClain, Pete Engelken	7,537	45	11	4
35.	30.	CV Advisors	Aventura, Fla.	Elliot Dornbusch, Alex Mann, Matthew J. Storm	70	5	1	1
36.	25.	Clarfeld Financial Advisors	Tarrytown, N.Y.	Rob Clarfeld, Rick Suarez, Robert Varrianno	565	60	18	7
37.	N	Kovitz Investment Group	Chicago	Mitchell Kovitz, Theodore Rupp, Robert Contreras	2,500	34	3	3
38.	N	Ferguson Wellman Capital Mgmt	Portland, Ore.	Jim Rudd, George Hosfield, Steve Holwerda	836	22	1	1
39.	N	Wetherby Asset Mgmt	San Francisco	Deb Wetherby, John Mell, Christy Covallesky	545	20	2	2
40.	19.	WE Family Offices	Miami	Mel Lagomasino, Santiago Ulloa, Michael Zeuner	72	14	2	2
41.	N	Balasa Dinverno Foltz	Itasca, Ill.	Armond A. Dinverno, Mark Balasa, Mike Foltz	1,285	43	3	1
42.	N	RGT Wealth Advisors	Dallas	Mark Griege, Chuck Thoele, Joe Nolan	566	35	1	1
43.	N	Chilton Trust	New York	Pepper Anderson, Richard L. Chilton Jr., Garrison duP. Lickle	459	15	6	6
44.	N	CliftonLarsonAllen Wealth Advisors	Minneapolis	Denny Schleper, Bruce Bushman, John Urosevich	4,598	79	32	15
45.	N	Mason Investment Advisory Services	Reston, Va.	William N. Mason III, Scott S. George, Christopher L. Schreiner	790	13	2	2
46.	N	B O S	San Francisco	Kevin Dorwin, Carol Benz, Rich Golinski	925	28	2	1
47.	N	Sequoia Financial Group	Akron, Ohio	Thomas Haight, Jeff Rovnak, Leon LaBrecque	3,639	34	6	3
48.	N	Bartlett Wealth Management	Cincinnati	Kelley J. Downing, James Hagerty, Kyle Pohlman	1,249	23	2	2
49.	N	Sullivan, Bruyette, Speros & Blayney	McLean, Va.	James J. Bruyette, Gregory D. Sullivan, Peter C. Speros	1,139	24	2	2
50.	37.	Athena Capital Advisors	Lincoln, Mass.	Lisette Cooper, Leonard Lewin	50	16	3	3