

AMERICA'S TOP 100 FINANCIAL PLANNER RIAs

This year's list represents top independent registered investment advisories that primarily do retail fee-only financial planning, as ranked by assets. As in past years, we screened the SEC's Form ADV database (provided to us by FINRA) for RIAs who declared that at least half of their business was managing the portfolios and investments of retail clients, both mass affluent and high-net-worth. All advisors on this list provide financial planning services, portfolio management for individuals and ongoing financial planning advice. To make the cut, they had to be fee-based only, and not accept commissions. In addition, we removed fund managers and their subsidiaries. And to keep the list as tightly focused as possible, we screened out RIAs that also do business as broker/dealers. But we did allow RIAs with registered reps—as long as they acted in a fee-only capacity within the firm. The data was collected on June 1, 2010.

Primary Business Name	City	Web Site Address	No. of Employees Who Perform Advisory Functions	No. of Clients	Discretionary Assets (\$ml)	Nondiscretionary Assets (\$ml)	Total AUM (\$ml)	Total # of Accounts
1. Financial Engines Advisors L.L.C.	Palo Alto, CA	www.financialengines.com	11-50	more than 500	25,766.9	0	25,766.9	431,337
2. ICMA Retirement Corp	Washington, DC	www.icmarc.org	51-250	more than 500	22,544.8	0	22,544.8	66
3. The Ayco Company, L.P.	Saratoga Springs, NY	www.aycofinancialnetwork.com	501-1000	more than 500	10,311.3	9,323.9	19,635.2	46,793
4. Guided Choice Asset Management, Inc.	San Diego, CA	www.guidedchoice.com	11-50	more than 500	19,238.8	0	19,238.8	420,000
5. Stancorp Investment Advisers, Inc.	Portland, OR	www.stancorpinancial.com	11-50	more than 500	7,779.7	10,783.2	18,562.9	18,791
6. Genspring Family Offices, LLC	Palm Beach Gardens, FL	www.genspring.com	51-250	more than 500	10,929.6	5,999.3	16,928.9	5,249
7. Convergent Wealth Advisors, LLC	Rockville, MD	www.convergentwealth.com	51-250	more than 500	4,361.6	5,875.6	10,237.2	5,857
8. Brinker Capital Inc	Berwyn, PA	www.brinkercapital.com	11-50	more than 500	4,922.1	3,954.0	8,876.1	29,115
9. Silvercrest Asset Management Group LLC	New York, NY	www.silvercrestgroup.com	11-50	more than 500	5,384.1	3,204.3	8,588.4	3,456
10. Oxford Financial Group, Ltd	Carmel, IN	www.ofg ltd.com	11-50	more than 500	372.0	8,066.5	8,438.5	4,844
11. SCS Capital Management LLC	Boston, MA	www.scsfinancial.com	11-50	101-250	6,705.0	0	6,705.0	124
12. Tag Associates LLC	New York, NY	www.tagassoc.com	11-50	101-250	506.5	5,983.6	6,490.1	958
13. Plante Moran Financial Advisors	Southfield, MI	www.pmfa.com	11-50	more than 500	2,604.2	2,507.6	5,111.8	1,966
14. Ronald Blue & Co. LLC	Roswell, GA	www.ronblue.com	51-250	more than 500	4,817.6	60.1	4,877.8	12,544
15. Johnson Investment Counsel, Inc.	Cincinnati, OH	www.johnsoninv.com	11-50	more than 500	4,709.2	0	4,709.2	9,341
16. MyCIO Wealth Partners, LLC	Philadelphia, PA	www.myciowp.com	11-50	251-500	1,512.7	2,830.1	4,342.8	3,274
17. Loring, Wolcott & Coolidge Fiduciary Advisors, LLP	Boston, MA	www.lwcotrust.com	11-50	more than 500	3,684.6	650.9	4,335.5	2,707

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18. Offit Capital Advisors	New York, NY	www.offitcapital.com	11-50	26-100	724.9	3,511.4	4,236.3	85
19. BBR Partners, LLC	New York, NY	www.bbrpartners.com	11-50	more than 500	3,735.0	364.0	4,098.9	667
20. Aspiriant, LLC	San Francisco, CA	www.aspiriant.com	11-50	251-500	2,902.6	1,055.7	3,958.3	2,956
21. KLS Professional Advisors Group, LLC	New York, NY	www.klsadvisors.com	6-10	more than 500	3,182.3	661.4	3,843.6	6,235
22. Litman/Gregory Asset Management, LLC	Larkspur, CA	www.lginvestments.com	11-50	251-500	987.0	2,852.3	3,839.2	908
23. Fiduciary Counseling Inc	St Paul, MN	www.fidcouns.net	11-50	more than 500	2,096.1	1,661.7	3,757.8	1,260
24. Eaton Vance Investment Counsel	Boston, MA	www.eatonvancecounsel.com	11-50	more than 500	3,001.0	472.1	3,473.1	1,834
25. Baker Street Advisors, LLC	San Francisco, CA	www.bakerstreetadvisors.com	6-10	101-250	0	3,360.0	3,360.0	203
26. Wasmer Schroeder & Co Inc	Naples, FL	www.wasmerschroeder.com	11-50	more than 500	3,332.1	24.7	3,356.8	1,265
27. Federal Street Advisors Inc	Boston, MA	www.federalstreet.org (reserved)	11-50	101-250	0	3,250.7	3,250.7	1,585
28. Mercer Global Advisors Inc.	Scottsdale, AZ	www.merceradvisors.com	51-250	more than 500	3,234.7	0	3,234.7	12,149
29. Genworth Financial Advisors Corporation	Schaumburg, IL	www.genworthfinancialsecurities.com	more than 1000	more than 500	2,913.5	278.5	3,191.9	16,274
30. Luminous Capital, LLC	Los Angeles, CA	luminouscap.com	11-50	251-500	2,818.7	326.5	3,145.2	1,678
31. Presidio Wealth Management LLC	San Francisco, CA	www.presidiofp.com	11-50	101-250	0	3,080.0	3,080.0	178
32. Athena Capital Advisors LLC	Lincoln, MA	www.athenacapital.com	11-50	26-100	1,571.5	1,496.9	3,068.4	147
33. Shepherd Kaplan LLC	Boston, MA	www.sk-llc.com	11-50	101-250	41.1	2,942.9	2,983.9	1,516
34. Ballentine Partners	Wolfeboro, NH	www.ballentinepartners.com	11-50	101-250	1,650.0	1,240.0	2,890.0	1,957
35. Symmetry Partners	Glastonbury, CT	www.symmetrypartners.com	11-50	more than 500	2,802.9	0	2,802.9	17,630
36. Gofen And Glossberg, L.L.C.	Chicago, IL	www.gofen.com	11-50	more than 500	2,641.7	160.2	2,801.9	2,770
37. Reinhart Partners, Inc.	Mequon, WI	www.reinhart-partnersinc.com	11-50	more than 500	2,770.3	0	2,770.3	2,337
38. GW & Wade, LLC	Wellesley, MA	www.gwwade.com	11-50	more than 500	2,050.8	647.6	2,698.5	5,477
39. Altair Advisers, LLC	Chicago, IL	www.altairadvisers.com	11-50	101-250	0	2,529.9	2,529.9	204
40. Spruce Private Investors, LLC	Stamford, CT	www.spruceinvest.com	6-10	26-100	436.4	2,069.5	2,505.9	111
41. Cornerstone Advisors Asset Management Inc.	Bethlehem, PA	www.cornerstone-companies.com	11-50	101-250	977.4	1,498.7	2,476.0	493
42. Strategic Capital Advisers, Inc.	Denver, CO	www.scadv.com	6-10	101-250	2,297.0	168.0	2,465.0	137
43. Calibre Advisory Services Inc.	Waltham, MA	www.calibre.com	11-50	251-500	2,392.1	54.7	2,446.8	2,512
44. 1st Global Advisors Inc	Dallas, TX	www.myretirementaccount.net	more than 1000	more than 500	958.4	1,405.0	2,363.5	9,166

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45. First Western Investment Management, Inc.	Denver, CO	www.fwtb.com	11-50	251-500	2,344.3	3.7	2,348.0	2,026
46. Iron Capital Advisors Inc.	Atlanta, GA	www.ironcapitaladvisors.com	1-5	26-100	23.9	2,223.2	2,247.1	102
47. Miller Investment Management, LP	West Conshohocken, PA	N/A	6-10	101-250	1,001.1	1,219.5	2,220.6	139
48. Bartlett & Co	Cincinnati, OH	www.bartlett1898.com	11-50	more than 500	2,080.8	38.2	2,119.0	2,116
49. Signature Financial Management Inc	Norfolk, VA	www.sigfin.com	11-50	101-250	1,504.9	583.4	2,088.3	734
50. Gresham Partners, LLC	Chicago, IL	www.greshampartners.com	11-50	26-100	1,655.8	430.4	2,086.2	2,165
51. Geller Family Office Services LLC	New York, NY	www.gellerco.com/family-office.html	6-10	26-100	1,713.7	353.1	2,066.8	278
52. Tolleson Private Wealth Management	Dallas, TX	www.tollesonwealth.com	11-50	26-100	1,508.7	530.8	2,039.5	1,699
53. Hewins Financial Advisors, LLC	San Mateo, CA	www.hewinsfinancial.com	6-10	101-250	1,055.8	960.2	2,016.0	3,450
54. Cornerstone Advisors Inc	Bellevue, WA	www.buildbeyond.com	11-50	251-500	2,013.0	0	2,013.0	1,649
55. Bingham, Osborn & Scarborough LLC	San Francisco, CA	www.bosinvest.com	11-50	more than 500	1,400.0	600.0	2,000.0	3,058
56. Harris SBSB	McLean, VA	www.harris-sbsb.com	11-50	more than 500	1,900.0	100.0	2,000.0	950
57. R.M. Davis Wealth Mgt.	Portland, ME	www.rmdavis.com	11-50	more than 500	1,986.5	9.1	1,995.6	3,190
58. Freestone Capital Management, LLC	Seattle, Wa	www.freestonecapital.com	6-10	more than 500	1,940.6	0	1,940.6	860
59. Atherton Lane Advisers, LLC	Menlo Park, CA	www.athertonlane.com	11-50	more than 500	1,769.0	132.5	1,901.5	685
60. Executive Monetary Management, LLC	New York, NY	www.emmny.com	6-10	26-100	0	1,887.5	1,887.5	91
61. Homrich Berg	Atlanta, GA	www.homrich-berg.com	11-50	more than 500	1,609.4	270.9	1,880.4	3,045
62. Tiedemann Wealth Management, LLC	New York, NY	www.tiedemannwealth.com	11-50	101-250	1,686.4	116.5	1,802.9	822
63. Dearborn Partners L.L.C.	Chicago, IL	www.dearbornpartners.com	11-50	251-500	1,600.0	193.1	1,793.1	454
64. Linscomb & Williams	Houston, TX	www.linscomb-williams.com	11-50	more than 500	1,614.7	129.0	1,743.6	4,456
65. Northeast Financial Consultants, Inc	Westport, CT	N/A	1-5	101-250	1,305.5	435.5	1,741.1	1,418
66. Mason Investment Advisory Services Inc	Reston, Va	www.masoncompanies.com	11-50	more than 500	1,670.6	64.4	1,734.9	726
67. United Capital Financial Advisers	Newport Beach, CA	www.unitedcp.com	51-250	more than 500	1,682.0	0	1,682.0	8,051
68. Windsor Financial Group LLC	Minneapolis, MN	www.wfgweb.com	11-50	more than 500	375.5	1,292.7	1,668.2	676
69. Capital Investment Counsel Inc	Denver, CO	www.cicinvestments.com	11-50	more than 500	1,622.0	0	1,622.0	3,409
70. Family Endowment Partners, LP	Waltham, MA	www.familyendowment.com	1-5	26-100	66.5	1,553.1	1,619.6	61

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71. RMB Capital Management	Chicago, IL	www.rmbcap.com	11-50	more than 500	1,453.1	160.8	1,613.9	6,993
72. Foundation Resource Management, Inc.	Little Rock, AR	www.foundationresourcemanagement.com	1-5	101-250	1,584.8	0	1,584.8	308
73. Joel Isaacson & Co., LLC	New York, NY	www.joelisaacson.com	11-50	more than 500	599.8	982.7	1,582.5	3,074
74. Savant Capital Management, Inc.	Rockford, IL	www.savantcapital.com	11-50	more than 500	1,562.1	20.4	1,582.5	1,935
75. Evercore Wealth Management, LLC	New York, NY	www.evercorewealthmanagement.com	11-50	101-250	1,506.0	51.0	1,557.0	462
76. Seia	Los Angeles, CA	www.seia.com	11-50	more than 500	110.7	1,411.1	1,521.7	4,582
77. Brighton Jones LLC	Seattle, WA	www.brightonjones.com	11-50	251-500	1,517.0	0	1,517.0	447
78. Laird Norton Tye Asset Strategies, LLC	Seattle, WA	www.lntyee.com	11-50	251-500	1,364.3	146.9	1,511.2	1,335
79. Threshold Group, LLC	Gig Harbor, WA	www.thresholdgroup.com	11-50	26-100	287.6	1,213.0	1,500.6	551
80. Arlington Partners LLC	Birmingham, AL	www.arlingtonpartners.com	6-10	101-250	552.7	930.1	1,482.8	800
81. Badgley Phelps Investment Managers	Seattle, WA	www.badgley.com	11-50	more than 500	1,219.6	262.1	1,481.7	855
82. Dowling & Yahnke, LLC	San Diego, CA	www.dywealth.com	6-10	more than 500	1,473.4	0	1,473.4	2,348
83. Massey, Quick & Co. LLC	Morristown, NJ	www.masseyquick.com	6-10	101-250	275.1	1,141.1	1,416.2	256
84. Plancorp, Inc.	Saint Louis, MO	www.plancorp.com	11-50	more than 500	1,362.4	26.9	1,389.3	3,015
85. Halbert, Hargrove/Russell LLC	Long Beach, CA	www.halberthargrove.com	11-50	more than 500	1,268.7	116.3	1,385.1	1,858
86. Solaris Advisors, LLC	New York, NY	www.solarisgroupllc.com	6-10	26-100	18.3	1,358.1	1,376.4	32
87. Manchester Capital Management LLC	Manchester, VT	www.mcmllc.com	6-10	101-250	1,248.1	90.8	1,338.9	654
88. Bailard, Inc.	Foster City, CA	www.bailard.com	11-50	251-500	1,316.0	14.4	1,330.4	813
89. Creative Planning	Overland Park, KS	www.thinkingbeyond.com	11-50	more than 500	1,020.9	301.6	1,322.5	4,801
90. MAI Wealth Advisors LLC	Cleveland, OH	www.maiwealth.com	11-50	251-500	1,285.3	36.2	1,321.5	1,496
91. Sweetwater Investments Inc	Redmond, WA	www.sweetwaterinv.com	1-5	101-250	347.7	965.6	1,313.2	142
92. Mariner Wealth Advisors, LLC	Leawood, KS	www.marinerwealthadvisors.com	11-50	more than 500	1,308.5	0	1,308.5	3,330
93. Aperio Group, LLC	Sausalito, CA	www.aperiogroup.com	6-10	251-500	1,297.0	0	1,297.0	398
94. Mccutchen Group LLC	Seattle, WA	N/A	6-10	26-100	528.6	727.7	1,256.3	88
95. Robertson, Grieger & Thoele	Dallas, TX	www.rgtnet.com	11-50	251-500	1,256.0	0	1,256.0	336
96. Budros, Ruhlman & Roe, Inc.	Columbus, OH	www.b-r-r.com	11-50	more than 500	1,215.9	38.7	1,254.6	4,987
97. WMS Partners, LLC	Towson, MD	www.wms-partners.com	6-10	251-500	771.0	475.6	1,246.6	319
98. The MDE Group, Inc.	Morristown, NJ	www.mdegroupp.com	6-10	101-250	1,227.0	0	1,227.0	1,429
99. Mozaic, LLC	Beverly Hills, CA	www.mozaic-llc.com	1-5	11-25	0	1,200.0	1,200.0	16
100. Rinet Company, LLC	Boston, MA	www.rinetco.com	11-50	251-500	1,199.8	0	1,199.8	1,397