

The Top 40 RIA Firms

The largest independent advisory firms grew by over 40% last year. With M&A only increasing, that growth is unlikely to slow anytime soon.

							Q Search...	
Rank '18	Rank '17	Firm	Location	Top Executives	Clients	Advisors	Offices	States
1	3	Edelman Financial Services*	Fairfax, Va.	Ryan Parker, Ric Edelman	37,351	163	43	16
2	4	United Capital Financial Advisers	Newport Beach, Calif.	Joe Duran, Edward Kummer, Gary Roth	21,021	221	85	29
3	2	Mariner Wealth Advisers	Overland Park, Kan.	Marty Bicknell, Cheryl Bicknell, Katrina Scott	14,890	205	25	18
4	7	Moneta Group Investment Advisers	Clayton, Mo.	Eric Kittner, Keith Bowles, Nathan Howard	4,395	95	2	1
5	5	Silvercrest Asset Mgmt Group	New York	Richard R. Hough III, David J. Campbell, Scott A. Gerard	722	27	7	4
6	NR	Private Advisor Group	Morristown, N.J.	John Hyland, Patrick Sullivan, Abby Salameh	40,933	620	240	34
7	6	Veritable	Newtown Square, Pa.	Michael A. Stolper, John J. Scuteri, David M. Belej	223	48	2	2
8	8	BBR Partners	New York	Brett Barth, Evan Roth, Mike Anson	136	28	4	3
9	17	Tiedemann Advisors	New York	Michael Tiedemann, Craig Smith, Kevin Moran	406	37	8	8
10	12	Buckingham Strategic Wealth	Saint Louis	Adam Birenbaum, David Levin, Shannon O'Toole	6,866	150	26	16

Rank '18	Rank '17	Firm	Location	Top Executives	Clients	Advisors	Offices	States
11	9	Ehrenkranz Partners	New York	Andrew Sommers, John Ehrenkranz	145	6	1	1
12	NR	Financial Engines*	Sunnyvale, Calif.	Lawrence M. Raffone, John Bunch, Christopher Jones	1,100,000	263	98	37
13	10	Aspiriant	Los Angeles	Rob Francais, Bret Magpiong, John Allen,	1,654	73	10	6
14	NR	CIBC Private Wealth Management	Atlanta	John S. Markwalter Jr., Eric Propper, Gabrielle D. Bailey	7,582	138	23	16
15	11	Brownson, Rehmus & Foxworth	Chicago	Susan Shacklette, John Lafferty, Steve Rehmus	467	16	4	4
16	NR	Mercer Advisors	Denver	Dave Welling, Loren Pierson, Karsten Voermann	9,000	64	26	16
17	NR	TAG Associates	New York	David Basner, Jonathan Bergman, John Pantowich	110	12	2	2
18	14	Pathstone	Englewood, N.J.	Steve Braverman, Allan Zachariah, Matthew Fleissig	309	60	7	7
19	NR	WE Family Offices	Miami	Mel Lagomasino, Santiago Ulloa, Michael Zeuner	72	14	2	2
20	15	Johnson Investment Counsel	Cincinnati	Jason O. Jackman, Bret H. Parrish, Timothy E. Johnson	3,958	37	5	1

Rank '18	Rank '17	Firm	Location	Top Executives	Clients	Advisors	Offices	States
21	16	Evercore Wealth Management	New York	Jeff Maurer, Chris Zander, Jay Springer	600	24	5	4
22	NR	The Colony Group	Boston	Michael J. Nathanson, Ron Rubin, Gina Bradley	3,126	76	10	6
23	NR	KLS Professional Advisors Group	New York	Gary Sica, Robert Schorr, Arthur Langhaus	973	16	2	2
24	21	Carson Group	Omaha, Neb.	Ron Carson, Aaron Schaben, Teri Shepherd	11,701	110	64	31
25	NR	Clarfeld Financial Advisors	Tarrytown, N.Y.	Rob Clarfeld, Rick Suarez, Robert Varriano	450	32	2	1
26	NR	Stratos Wealth Partners	Beachwood, Ohio	Jeffrey Concepcion, Nancy Andrefsky, Matthew Dunn	13,700	264	87	24
27	NR	Captrust	Raleigh, N.C.	J. Fielding Miller, Wilson S. Hoyle III, Ben Goldstein	5,138	155	37	15
28	23	RMB Capital	Chicago	Richard M. Burrige Jr., Frederick Paulman, Walter H. Clark	2,722	22	17	13
29	29	Summit Trail Advisors	New York	Jack B. Petersen, David Romhilt, Tom Harms	325	15	5	5
30	18	CV Advisors	Aventura, Fla.	Elliot Dornbusch, Alex Mann, Matthew J. Storm	65	4	1	1

Rank '18	Rank '17	Firm	Location	Top Executives	Clients	Advisors	Offices	States
31	NR	Douglas C. Lane & Associates	New York	Edward Dewees, Sarat Sethi, Douglas Lane	1,150	7	1	1
32	24	Churchill Management Group	Los Angeles	Fred A. Fern, Randy C. Conner, Eileen A. Holmes	5,926	45	38	15
33	20	Sontag Advisory	New York	Michael Delgass, Howard Sontag	1,274	10	3	3
34	NR	Welch & Forbes	Boston	Kurt Walter, Benjamin J. Williams Jr., Adrienne G. Silbermann	808	10	1	1
35	22	Savant Capital Management	Rockford, Ill.	Brent R. Brodeski, Richard A. Bennett, David F. Barton	4,529	41	12	3
36	NR	Beacon Pointe Advisors	Newport Beach, Calif.	Shannon Eusey, Matthew Cooper, Graham Pierce	3,500	80	12	5
37	19	Athena Capital Advisors	Lincoln, Mass.	Lisette Cooper, Leonard Lewin	45	10	3	3
38	26	WMS Partners	Towson, Md.	Pace Kessenich, Timothy W. Chase, Chad Norfolk	325	23	2	1
39	NR	MAI Capital Management	Cleveland	Richard J. Buoncore, James D. Kacic, Mark H. Summers	853	33	5	4
40	30	Joel Isaacson & Co.	New York	Joel S. Isaacson, Stanley Altmark, Robert Paul	888	16	1	1