

## The Billion Dollar Club

AUM	Firm name	Location	Staff	Chief executive
\$14,337,303,133	Plante Moran Financial Advisors	Southfield, Mich.	142	John Lesser
\$7,377,051,916	myCIO Wealth Partners	Philadelphia	46	David Lees
\$6,074,696,862	CLA Wealth Advisors	NA	131	Bruce Bushman
\$5,694,022,608	RSM US Wealth Management	Minneapolis	121	David Scudder
\$5,482,821,236	Savant Capital Management	Rockford, Ill.	167	Brent Brodeski
\$4,137,417,185	Joel Isaacson & Co.	New York City	44	Joel Isaacson
\$3,903,138,332	Sequoia Financial Group	Akron, Ohio	85	Thomas Haught
\$3,810,052,130	Forum Financial Management*	Lombard, Ill.	96	N. Batavia / J. Rogers
\$3,560,000,591	HBKS Wealth Advisors	Erie, Pa.	85	Christopher Allegretti
\$3,427,227,047	SignatureFD	Atlanta	84	Jeff Peller
\$3,375,355,443	Wipfli Financial Advisors	Milwaukee	78	Jeff Pierce
\$3,160,640,372	Honkamp Krueger Financial Services Inc.	Dubuque, Iowa	96	John Darrah
\$3,002,500,000	Level Four Advisory Services	Plano, Texas	38	Edmon Tomes
\$2,994,870,632	BKD Wealth Advisors	Springfield, Mo.	65	Jack Thurman
\$2,650,000,000	Provenance Wealth Advisors	Ft. Lauderdale, Fla.	44	Eric Zeitlin
\$2,602,321,471	SVA Wealth Management*	Madison, Wis.	63	Maureen Hansen
\$2,505,924,099	Warren Averett Asset Management*	Birmingham, Ala.	49	Joshua Reidinger
\$2,411,613,175	Moss Adams Wealth Advisors*	Seattle	55	
\$2,400,000,000	Citrin Cooperman	New York City	15	Joel Cooperman
\$2,400,000,000	Frontier Wealth Management	Kansas City, Mo.	45	Nick Blasi
\$2,017,070,353	Rehmann	Troy, Mich.	947	Randall Rupp
\$1,700,000,000	DHG Wealth Advisors†	Asheville, N.C.	36	William Sneed
\$1,685,824,412	Wealth Management	Norfolk, Neb.	56	Jared Faltys

\$1,652,849,088	Aldrich Wealth	Lake Oswego, Ore.	25	K. Scott Barchus
\$1,608,470,000	Schneider Downs Wealth Management	Pittsburgh	20	Nancy Skeans
\$1,300,000,000	CCR Wealth Management	Westborough, Mass.	20	David Borden
\$1,283,069,118	BerganKDV Wealth Management	Bloomington, Minn.	23	Matt Cosgriff
\$1,277,257,308	GHP Investment Advisors Inc.*	Denver	18	Brian Friedman
\$1,250,000,000	RubinBrown Advisors	Clayton, Mo.	15	Thomas Tesar
\$1,220,000,000	LBMC Investment Advisors	Brentwood, Tenn.	8	Greg Herman
\$1,072,317,577	Beaird Harris	Dallas	13	Pat Beaird
\$1,049,834,576	SAX Wealth Advisors	Clifton, N.J.	15	Kyle Stawicki
\$1,006,999,993	Valley National Financial Advisors	Bethlehem, Pa.	38	Matthew Petrozelli
\$1,004,550,000	BT Wealth Management	Atlanta	17	Scott Craig
\$1,003,706,704	RKL Wealth Management	Lancaster, Pa.	26	Laurie Peer

### The \$500 Million-Plus Club

AUM	Firm name	Location	Staff	Chief executive
\$966,000,000	Thomas Doll	Walnut Creek, Calif.		Jared Nelson/Barry Oliver
\$890,000,000	Jackson Thornton Asset Management	Montgomery, Ala.		Tommy West
\$877,864,395	Frank, Rimerman Advisors*	Palo Alto, Calif.	3	Patrick Sullivan
\$856,184,278	Lutz Financial*	Omaha, Neb.	11	Jim Boulay
\$840,000,000	BDO Wealth Advisors	Jacksonville, Fla.	20	David Albaneze
\$812,000,000	Corrigan Financial Inc.	Middletown, R.I.	27	Daniel Corrigan
\$809,338,290	SPC Financial Inc.	Rockville, Md.	28	Edward Geoffrey Sella
\$750,000,000	Allegiant Private Advisors	Sarasota, Fla.	12	Benjamin Jones

\$750,000,000	EisnerAmper Wealth Mgt. & Corp. Benefits	Iselin, N.J.	14	Marc Scudillo
\$731,423,611	Marcum Financial Services	Melville, N.Y.	12	Steven Brett
\$704,559,017	CRA Financial	Northfield, N.J.	11	Tom and Matt Reynolds
\$704,400,000	Aurum Wealth Management	Mayfield Village, Ohio	16	Eric Wulff
\$700,000,000	Boulay Financial Advisors	Eden Prairie, Minn.	18	Jay Brown
\$700,000,000	Meritrust Wealth Management	Louisville, Ky.	11	John Kallis
\$698,000,000	Traphagen Investment Advisors	Oradell, N.J.	12	V. Peter Traphagen
\$680,704,393	Eide Bailly Advisors*	Fargo, N.D.	17	Brad Kelley
\$662,121,697	REDW Wealth*	Albuquerque, N.M.	14	
\$630,844,484	PYA Waltman Capital*	Knoxville, Tenn.	9	J. William Waltman
\$624,615,188	Howard Financial Services*	Dallas	16	John Howard
\$600,000,000	Aprio Wealth Management	Atlanta	5	Keith Greenwald
\$594,343,954	WPWealth	Fort Worth, Texas	12	Thomas Rein
\$592,254,353	SC&H Financial Advisors Inc.	Sparks, Md.	21	Gregory Horning
\$591,429,559	Rollins Financial Inc.	Atlanta	15	Joseph Rollins
\$591,128,219	PBMares Wealth Management	Williamsburg, Va.	14	Robert Klingensmith
\$575,000,000	Irwin Schaffer	Saint Paul, Minn.	5	Tom Irwin
\$551,000,000	KEB Asset Management	Springfield, Ill.		Jim Hagerman
\$525,000,000	Smith & Howard Wealth Management	Atlanta	9	Tim Agnew
\$521,000,000	Withum Wealth Management	Red Bank, N.J.	11	James Ferrare
\$513,000,000	Dopkins Wealth Management	Williamsville, N.Y.		Tom Emmerling
\$512,759,142	Whitley Penn Financial*	Fort Worth, Texas	8	

### The \$100 Million-

**Plus Club**

<b>AUM</b>	<b>Firm name</b>	<b>Location</b>	<b>Staff</b>	<b>Chief executive</b>
\$492,000,000	Kemper Capital Management	Robinson, Ill.	17	Thomas Moore
\$478,000,000	GreerWalker	Charlotte, N.C.	6	James Reichard
\$447,629,675	Jack Oujo CPA Inc.	Wall, N.J.	10	Jack Oujo
\$439,440,066	Cherry Bekaert Wealth Management*	Richmond, Va.	16	
\$420,249,664	KMH Wealth Management	Victoria, Texas	9	Thomas Lane Keller
\$420,000,000	BCS Wealth Management	Johnson City, Tenn.	11	Nick Clay
\$413,000,000	Nova Wealth Management Group	Atlanta		Jeffrey Cohen/Sam Bromberg
\$401,653,074	Glass Jacobson IA	Owings Mills, Md.	13	Jon Dinkins
\$386,885,126	Sikich Financial*	Springfield, Ill.	14	
\$367,000,000	Rowling & Associates	San Diego	15	Sheryl Rowling
\$361,378,277	Arnett Carbis Toothman Wealth Advisors*	Charleston, W. Va.	7	
\$358,000,000	Kraft Asset Management	Nashville, Tenn.		Stephen High
\$344,659,024	Gross Mendelsohn & Associates	Baltimore	120	David Goldner
\$342,000,000	Lauterbach Financial Advisors	El Paso, Texas		Jon Sonnen
\$325,000,000	Mark Sheptoff Financial Planning	Glastonbury, Conn.	2	Mark Sheptoff
\$323,000,000	ShankerValleau Wealth Advisors Inc.	Skokie, Ill.	9	Lawrence Shanker
\$317,000,000	Pivotal Planning Group	Jericho, N.Y.	13	John Marchisotta
\$316,409,357	Bernath & Rosenberg	New York City	5	Jacob Rosenberg
\$304,000,000	Claris Advisors	St. Louis		Stan Royer
\$300,000,000	KPM Wealth Advisors	Springfield, Mo.	5	Jay McIntyre
\$294,000,000	Andrews, Lucia Wealth Management	San Mateo, Calif.		Robert Lucia
		Birmingham,		

\$283,400,000	Kassouf Wealth Advisors*	Ala.	4	
\$283,200,000	SK Wealth Management	Providence, R.I.	7	Jason Archambault
\$252,000,000	Horne Wealth Advisors	Ridgeland, Miss.		Stan Purvis
\$250,000,000	AAFCPAs Wealth Management	Westborough, Mass.	8	C. Grinkis / A. Hammond
\$248,366,028	Squar Milner Financial Services*	Irvine, Calif.	10	
\$244,753,000	KLR Wealth Management	Providence, R.I.	6	Peri Ann Aptaker
\$243,634,105	Cassady Schiller Wealth Management*	Cincinnati	6	Michael Clark
\$241,500,000	Henry + Horne Wealth Management*	Scottsdale, Ariz.	22	Michael J. Carlin
\$238,000,000	COSYNTRIS Advisory Network	Denver	4	Trevor Emery
\$235,000,000	Carey & Hanna   Tax & Wealth Planners	Oxnard, Calif.	12	Davin Carey
\$225,000,000	FMF & E Wealth Management	East Syracuse, N.Y.		Chris Gardner
\$214,692,614	Causey Demgen & Moore*	Denver	55	Nathanael Koch
\$209,000,000	Wealth Management Group	Dover, Del.		Scott Brown
\$197,000,000	Heartland Wealth Advisors	Overland Park, Kan.		Douglas Hunt
\$192,176,921	WebsterRogers Financial Advisors*	Florence, S.C.	8	
\$192,000,000	Wasserman Wealth Management	Farmington Hills, Mich.		Brad Wasserman
\$190,000,000	Dental Wealth Advisors	Kirkland, Wash.		Sam Martin
\$180,000,000	Blue Ocean Strategic Capital	Syracuse, N.Y.	7	Theodore Sarenski
\$180,000,000	Lumsden McCormick Financial Services	Buffalo, N.Y.	10	David Schlein
\$179,112,125	LGT Financial Advisors*	Dallas	6	
\$173,000,000	JDH Wealth Management	Santa Rosa, Calif.		Matt Delaney
		Grand Ledge,		Roger Millbrook/Steve

\$171,000,000	Siena Investments	Mich.		Hicks
\$167,108,539	Alliant Wealth Advisors	Prince William, Va.	8	John Frisch
\$160,000,000	Homan Wealth Advisors	Omaha, Neb.		Richard Homan
\$159,000,000	Shoreline Asset Management	New Castle, Ind.		Marion Shore
\$154,000,000	Squire Wealth Advisors	Orem, Utah		Tim Christensen
\$153,000,000	Briggs Wealth Management, Inc.	Glastonbury, Conn.	3	Mark Briggs
\$145,000,000	PKS Investment Advisors	Salisbury, Md.		John Stern
\$145,000,000	Wehring Wealth Management	Bellville, Texas	9	Charlene Wehring
\$143,000,000	JMF Capstone Wealth Management	Tuscaloosa, Ala.		Joel Lake
\$142,000,000	Pitzl Financial	Arden Hills, Minn.		Joe Pitzl
\$140,000,000	JRF Asset Advisors	Garden City, N.Y.	4	Jay Freeberg
\$140,000,000	Walpole Financial Advisors	Goleta, Calif.		Kirk Stovesand/Jean Smith
\$137,000,000	Bland Garvey Wealth Advisors	Richardson, Texas		John Garvey
\$135,000,000	M. White Financial Services	Baytown, Texas	3	Matthew White
\$135,000,000	Susquehanna Financial Advisors	Mechanicsburg, Pa.	7	Edward Gormley
\$128,000,000	CTM Financial	Knoxville, Tenn.		Pat Taylor
\$128,000,000	Waypoint Wealth Management	Timonium, Md.		G. Palmer/D. Callan/P. Dixon
\$127,000,000	Millares Asset Management	Coral Gables, Fla.		Ruben Millares
\$125,000,000	Allied Financial Partners	Victor, N.Y.	40	Tom Tette
\$121,996,000	Lurie Wealth Advisors	Minneapolis	3	Michele Martin
\$119,000,000	AVL WealthCare	Gulfport, Miss.		Thomas Schmidt
\$115,980,124	Mazars USA Wealth Advisors*	New York City	4	

\$108,000,000	CDSF	Willmar, Minn.	3	Chance Hooper
\$104,000,000	Green Wealth Management	Salem, Ore.		Steven Jamison
\$100,000,000	Cole, Newton & Duran CPAs	Livonia, Mich.	48	Arthur Cole

### The Rising Stars

AUM	Firm name	Location	Staff	Chief executive
\$95,800,000	Scafa Financial Services	Pennington, N.J.	1	Elizabeth Scafa
\$94,000,000	Forest Asset Management	Berwyn, Ill.		JoAnn May
\$94,000,000	Mason Road Wealth Advisors	St. Louis		Lori Plescia
\$91,000,000	Alliance Wealth Strategies	Roanoke, Va.		NA
\$90,000,000	Kutchins, Robbins & Diamond	Schaumburg, Ill.	79	Allen Kutchins
\$88,587,600	Dexter Ward and Associates	Denison, Texas	3	Dexter Ward
\$87,000,000	Madison Wealth Advisors	Lee's Summit, Mo.		Doug Clark
\$84,511,761	Gallagher Flynn Financial Advisors*	South Burlington, Vt.	4	
\$82,000,000	Neuenschwander Asset Management	McFarland, Wis.		Tim Neuenschwander
\$78,000,000	Pile Wealth Management	Indianapolis		Neal Clements
\$78,000,000	TDC Capital Advisors	College Station, Texas	4	Ronnie Craig
\$77,000,000	Steven P. Margulin CPA PC	Albuquerque, N.M.	7	Steve Margulin
\$76,000,000	HBE Wealth Management	Lincoln, Neb.		Scott Becker
\$75,000,000	Morrison & Associates Wealth Mgmt.	St. Charles, Ill.	3	William Morrison
\$72,000,000	Coventry Financial Group	Quitman, Texas	3	Larry Coventry
\$71,319,049	The Whitlock Company	Springfield, Mo.	65	Joe Page
\$70,000,000	Cohesion Wealth Advisors	Dallas	4	Robert Rinker
\$70,000,000	Portsmouth Wealth Management	Portsmouth, N.H.	2	William MacDonald

\* Data provided by Audit Analytics, a premium online intelligence service that delivers audit, regulator and disclosure analysis to the accounting community. Reach them at (508) 476-7007, [www.auditanalytics.com](http://www.auditanalytics.com), or

[info@auditanalytics.com](mailto:info@auditanalytics.com).

† Last year, Dixon Hughes Goodman Wealth Advisors reported its total assets under advisement; this year it is reporting solely assets under management. It has over \$2.2 billion in total assets under advisement.