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Facing Down The Talent Crisis

Our biggest human capital challenge may still be ahead of us.

The Real Impact Of ESG

As critics start to hover over the ESG space, we ask what the real pros and cons are.



How To Use LinkedIn

Susan Theder answers 10 advisor questions about how to use the popular site.

FA's 2022 RIA RANKING



Commonwealth

RAYMOND JAMES



RANK	TOTAL ASSETS (\$MM)	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
100		HBKS Wealth Advisors	Erie, Pa.	5,341.13	-3.70%	3.94	3.05%	2.57%
101		GYL Financial Synergies	West Hartford, Conn.	5,318.70	17.30%	1.32	-5.41%	18.25%
102		Allegheny Financial Group	Pittsburgh, Pa.	5,185.00	32.21%	1.15	17.05%	18.35%
103		Fort Pitt Capital Group	Pittsburgh, Pa.	4,899.22	23.15%	1.09	12.49%	9.21%
104		Wilbanks, Smith & Thomas Asset Mgmt	Norfolk, Va.	4,370.41	23.52%	2.05	14.26%	8.37%
105		Crestwood Advisors	Boston, Mass.	4,963.45	25.24%	5.08	17.47%	6.02%
106		Index Fund Advisors	Irvine, Calif.	4,937.68	13.47%	2.08	18.42%	0.98%
107		Edge Capital Group	Atlanta, Ga.	4,804.23	11.96%	13.96	51.4%	7.40%
108		Geller Advisors	New York, N.Y.	4,837.44	-3.03%	33.08	-5.75%	11.48%
109		Mission Wealth Management	Santa Barbara, Calif.	4,015.11	29.24%	2.36	3.67%	14.05%
110		Retirement Planners of America	Panama, Texas	4,004.67	1.81%	3.57	-3.83%	7.94%
111		Zhang Financial	Portage, Mich.	4,704.00	23.97%	2.94	15.00%	7.19%
112		Badgley Phelps Wealth Managers	Seattle, Wash.	4,700.43	24.37%	1.62	15.04%	6.36%
113		Beacon Capital Management	Dayton, Ohio	4,744.09	41.92%	3.47	33.69%	6.16%
114		JMG Financial Group	Downers Grove, Ill.	4,716.00	24.50%	1.54	9.09%	14.12%
115		Cassaday & Company	Melrose, Va.	4,447.15	26.10%	1.71	20.38%	-4.83%
116		Truepoint Wealth Counsel	Cincinnati, Ohio	4,342.93	29.14%	2.61	8.10%	11.15%
117		Annex Wealth Management	Emery Grove, Wis.	4,595.18	21.32%	0.79	10.93%	9.43%
118		Kovack Advisors	Fort Lauderdale, Fla.	4,547.29	29.24%	0.47	132.1%	14.15%
119		FL Putnam Investment Mgmt Company	Wellesley, Mass.	4,547.15	26.90%	8.21	-4.82%	36.84%
120		Gardner Capital	North Palm Beach, Fla.	4,504.00	14.90%	10.70	-5.67%	22.03%
121		Inverness Counsel	New York, N.Y.	4,468.95	26.62%	11.82	58.40%	-10.04%
122		WA Asset Management	Birmingham, Ala.	4,465.84	28.25%	3.16	16.63%	9.78%
123		Finacess Advisors	Miami, Fla.	4,446.18	-3.16%	39.70	-13.54%	-2.00%
124		Griffith Investments	Alder Hills, Minn.	4,215.74	35.10%	0.24	14.32%	-0.22%
125		Executive Wealth Advisors	Oxnard, Calif.	4,200.00	24.90%	1.61	14.80%	9.03%
126		Crescent Grove Advisors	Lake Forest, Ill.	4,354.31	17.84%	19.20	-2.16%	20.40%
127		Brownson, Rehmus & Foxworth	Chicago, Ill.	4,298.88	-28.66%	19.02	35.45%	-47.32%
128		Parsec Financial	Asheville, N.C.	4,226.30	22.25%	3.14	15.55%	6.70%
129		Govington Capital Management	Los Angeles, Calif.	4,204.19	17.30%	8.96	6.73%	7.62%
130		Clifford Swan Investment Counselors	Pasadena, Calif.	4,187.90	18.48%	4.49	14.87%	3.32%
131		Crestone Capital	Boulder, Colo.	4,174.90	34.19%	20.36	16.52%	15.17%
132		Bordeaux Wealth Advisors	Merid Park, Calif.	4,107.97	18.38%	-21.51	-1.45%	20.13%
133		Frontier Wealth Management	Kansas City, Mo.	4,102.94	12.01%	2.23	10.30%	-1.19%
134		Beacon Investment Advisory Services	Monticello, N.J.	4,063.00	19.47%	3.16	25.7%	7.73%
135		Prio Wealth	Boston, Mass.	4,051.48	14.06%	5.96	14.19%	1.64%
136		Advance Capital Management	Southfield, Mich.	4,008.54	17.92%	0.82	9.27%	7.90%
137		Pure Financial Advisors	San Diego, Calif.	4,003.38	38.37%	1.40	28.97%	1.17%
138		Carnegie Investment Counsel	Pepper Pike, Ohio	3,911.24	35.30%	1.91	17.21%	15.43%
139		Cary Street Partners Investment Advisory	Richmond, Va.	3,846.15	21.25%	1.23	16.53%	3.75%
140		Robertson Stephens Wealth Management	San Francisco, Calif.	3,830.99	87.53%	6.25	24.82%	50.24%
141		Mainstay Capital Management	Grand Blanc, Mich.	3,858.74	11.84%	1.01	9.75%	2.81%
142		Westwood Asset Management	Los Angeles, Calif.	3,837.48	33.00%	2.80	20.90%	1.74%
143		TGI Wealth Advisors	Tucson, Ariz.	3,764.47	18.30%	1.46	9.39%	8.13%
144		Meriman Wealth Management	Seattle, Wash.	3,694.33	21.79%	1.80	16.26%	-4.94%
145		Hamilton Capital	Columbus, Ohio	3,634.51	24.85%	1.45	18.27%	-5.55%
146		Heritage Investors Management Corporation	Bethesda, Md.	3,615.32	17.28%	8.00	16.16%	1.85%
147		Access Wealth Management	Carlsbad, Calif.	3,588.02	71.10%	0.71	136.14%	-28.22%
148		TFO Phoenix	Phoenix, Ariz.	3,575.98	23.68%	18.53	6.38%	16.27%
149		TFO-TDC, LLC dba TDC Investment Advisory	Maumee, Ohio	3,561.30	22.47%	3.54	14.58%	6.92%

*Discretionary and non-discretionary AUM can be found at FPA's website: www.fpa.org. **Average assets per client (excluding) firms starting in 2021. ***AUM is for FPA Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees. † AUM is for NorthGate Asset Management's direct and indirect advisory services offered through Cornerstone Wealth. †† FPA Global Advisors is a wholly owned RIA by The Global Asset Management Solution (TEAMS), and is the sub-advisor to TEAMS.