

FINANCIAL ADVISOR

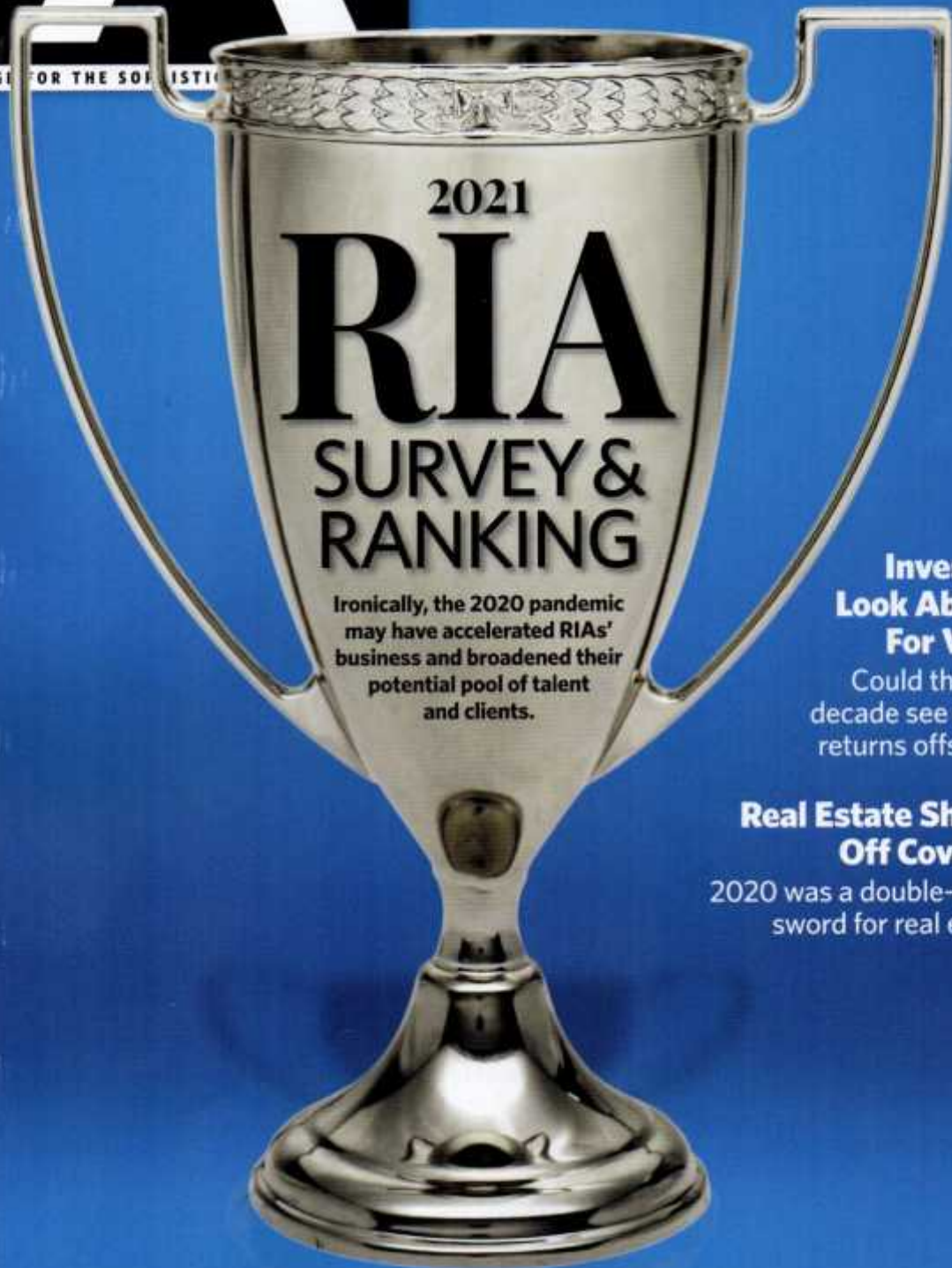
FA

KNOWLEDGE FOR THE SOPHISTICATED

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Cybersecurity Threats To Family Offices Surge

Sophisticated hackers target the ultra-rich.



2021

RIA

SURVEY & RANKING

Ironically, the 2020 pandemic may have accelerated RIAs' business and broadened their potential pool of talent and clients.

Investors Look Abroad For Value

Could the next decade see better returns offshore?

Real Estate Shakes Off Covid-19

2020 was a double-edged sword for real estate.

FA's 2021 RIA RANKING



RAYMOND JAMES

2020 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2020 ASSETS (\$MM)**	% GROWTH IN ASSETS 2019-2020	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
102	Litman Gregory Asset Management	Walnut Creek, Calif.	4,319.50	-2.72%	\$8.57	-5.42%	2.86%
103	Wipfli Financial Advisors	Milwaukee, Wis.	4,276.51	18.23%	\$2.22	17.01%	1.05%
104	Index Fund Advisors	Irvine, Calif.	4,132.88	2.23%	\$1.76	7.06%	-4.51%
105	Carroll Financial Associates	Charlotte, N.C.	4,085.36	17.19%	\$0.73	4.68%	11.96%
106	Fort Pitt Capital Group	Pittsburgh, Pa.	4,088.23	14.92%	\$1.50	12.79%	1.89%
107	Wilbanks, Smith & Thomas Asset Management	Norfolk, Va.	4,014.21	14.44%	\$1.80	0.00%	14.38%
108	Zhang Financial	Portage, Mich.	4,003.18	24.41%	\$0.86	16.55%	-8.75%
109	Douglass Winthrop Advisors	New York, N.Y.	4,002.15	22.57%	\$3.82	7.03%	14.52%
110	Crestwood Advisors Group	Boston, Mass.	3,963.02	20.38%	\$4.77	11.55%	7.92%
111	Ingalts & Snyder	New York, N.Y.	3,930.24	-0.94%	\$1.01	5.17%	-5.81%
112	Advisors Capital Management	Ridgewood, N.J.	3,883.91	21.51%	\$1.18	10.34%	10.12%
113	Allegheny Financial Group	Pittsburgh, Pa.	3,879.48	13.62%	\$0.99	5.62%	7.57%
114	Truepoint Wealth Counsel	Cincinnati, Ohio	3,864.66	14.44%	\$2.67	-16.61%	37.23%
115	Badgley Phelps Wealth Managers	Seattle, Wash.	3,818.36	19.49%	\$4.81	8.05%	10.58%
116	Parallel Advisors	San Francisco, Calif.	3,811.59	20.29%	\$1.58	11.15%	8.22%
117	Northeast Financial Consultants	Westport, Conn.	3,811.07	14.80%	\$16.36	11.35%	3.10%
118	JMG Financial Group	Downers Grove, Ill.	3,786.00	13.88%	\$3.28	3.30%	10.22%
119	Annex Wealth Management	Elm Grove, Wis.	3,785.92	46.00%	\$0.71	26.99%	14.97%
120	Frontier Investment Management Company	Dallas, Texas	3,770.43	17.85%	\$1.75	-1.39%	19.51%
121	Camden Capital	El Segundo, Calif.	3,770.23	-8.73%	\$10.93	-9.79%	1.17%
122	Abacus Wealth Partners	Santa Monica, Calif.	3,750.00	37.56%	\$2.25	29.33%	6.37%
123	Mission Wealth Management	Santa Barbara, Calif.	3,725.81	44.64%	\$2.27	8.62%	33.17%
124	Crescent Grove Advisors	Lake Forest, Ill.	3,695.57	8.23%	\$13.49	2.31%	5.79%
125	Cassaday & Company	McLean, Va.	3,682.89	12.27%	\$1.31	-17.70%	36.57%
126	Covinton Capital Management	Los Angeles, Calif.	3,584.26	40.18%	\$8.32	59.36%	-12.04%
127	Clifford Swan Investment Counselors	Pasadena, Calif.	3,534.00	6.60%	\$3.91	-5.47%	14.89%
128	Inverness Counsel	New York, N.Y.	3,529.81	-8.36%	\$7.52	-9.92%	1.74%
129	Kovack Advisors	Fort Lauderdale, Fla.	3,518.59	21.49%	\$0.41	21.51%	-0.01%
130	Prio Wealth	Boston, Mass.	3,516.71	36.31%	\$5.24	30.01%	4.64%
131	EL Putnam Investment Management Company	Wellesley, Mass.	3,487.49	25.21%	\$3.36	9.05%	14.81%
132	Bordeaux Wealth Advisors	Menlo Park, Calif.	3,470.10	52.47%	\$21.82	21.78%	25.20%
133	Grimes & Company	Westborough, Mass.	3,456.88	19.30%	\$1.21	9.94%	8.51%
134	Advance Capital Management	Southfield, Mich.	3,451.07	16.77%	\$0.57	11.72%	4.52%
135	Parsec Financial	Asheville, N.C.	3,427.81	14.56%	\$1.87	11.94%	2.34%
136	Mainstay Capital Management	Grand Blanc, Mich.	3,419.80	27.81%	\$0.92	25.07%	2.18%
137	Berman Capital Advisors	Atlanta, Ga.	3,340.18	22.83%	\$13.80	5.07%	16.91%
138	Warren Averett Asset Management	Birmingham, Ala.	3,291.01	21.17%	\$2.57	15.58%	4.64%
139	Cary Street Partners Investment Advisory	Richmond, Va.	3,254.88	67.69%	\$1.05	N/A	N/A
140	Gradient Investments	Arden Hills, Minn.	3,237.74	25.22%	\$0.21	12.52%	11.29%
141	Destination Wealth Management	Walnut Creek, Calif.	3,226.54	17.23%	\$1.69	10.35%	6.24%
142	Telemus Capital	Southfield, Mich.	3,197.31	4.50%	\$1.99	-18.69%	28.51%
143	TCI Wealth Advisors	Tucson, Ariz.	3,182.07	7.02%	\$1.36	5.05%	1.87%
144	Westmount Asset Management	Los Angeles, Calif.	3,116.54	1.82%	\$2.38	2.96%	-0.53%
145	Crestone Capital	Boulder, Colo.	3,110.88	5.46%	\$28.03	-8.89%	13.27%
146	Heritage Investors Management Corp.	Bethesda, Md.	3,083.05	10.43%	\$4.39	11.37%	-0.85%
147	Pure Financial Advisors	San Diego, Calif.	3,070.77	17.57%	\$1.08	1.63%	15.69%
148	Frontier Wealth Management	Kansas City, Mo.	3,062.31	24.93%	\$1.61	7.38%	16.35%
149	CM Wealth Advisors	Beachwood, Ohio	3,036.99	3.38%	\$17.86	0.34%	3.03%
150	Matter Family Office	St. Louis, Mo.	3,026.00	3.99%	\$16.36	1.18%	2.78%
151	Budros, Ruhlin & Roe	Columbus, Ohio	3,019.51	10.50%	\$3.80	5.63%	4.61%
152	Hamilton Capital	Columbus, Ohio	2,911.02	3.48%	\$1.23	-1.08%	4.58%