

# FA's 2009 RIA Ranking (By Total Assets)

| 2008 TOTAL ASSETS RANK* | FIRM NAME                                  | LOCATION                | YEAR END 2008 ASSETS (\$MM) | % GROWTH IN ASSETS 2007-2008 | ASSETS PER CLIENT (\$MM)** | % GROWTH IN ASSETS PER CLIENT | % CHANGE IN NO. OF CLIENTS |
|-------------------------|--|-------------------------|-----------------------------|------------------------------|----------------------------|-------------------------------|----------------------------|
| 210                     | Heritage Wealth Management                 | San Diego, Calif.       | 161.00                      | -19.90                       | 0.64                       | -23.10                        | 4.17                       |
| 211                     | Herbein Wealth Management                  | Wyomissing, Pa.         | 160.62                      | -13.15                       | 0.99                       | -16.90                        | 4.52                       |
| 212                     | Center for Financial Planning              | Southfield, Mich.       | 159.71                      | 0.00                         | 0.18                       | -4.13                         | 4.31                       |
| 213                     | Tilson Financial Group                     | Watchung, N.J.          | 156.26                      | -20.81                       | 0.52                       | -16.06                        | -5.66                      |
| 214                     | FAC Wealth Management                      | Naples, Fla.            | 153.59                      | 17.16                        | 0.51                       | -17.14                        | 41.40                      |
| 215                     | DCA Global Investment Management           | Norcross, Ga.           | 150.95                      | -18.39                       | 1.59                       | -31.28                        | 18.75                      |
| 216                     | Sycamore Financial Group                   | Kokomo, Ind.            | 149.80                      | -16.78                       | 0.12                       | -27.18                        | 14.29                      |
| 217                     | Capital Planning Advisory Group            | Yardley, Pa.            | 149.52                      | -18.02                       | 0.52                       | -23.13                        | 6.64                       |
| 218                     | McCarthy Grittinger Weil Financial Group   | Milwaukee, Wis.         | 149.44                      | -24.33                       | 0.58                       | -28.13                        | 5.28                       |
| 219                     | Ritter Daniher Financial Advisory          | Cincinnati, Ohio        | 148.35                      | 30.89                        | 1.11                       | 17.22                         | 11.67                      |
| 220                     | Moisand Fitzgerald Tamayo                  | Maitland, Fla.          | 148.26                      | -18.86                       | 0.55                       | -21.26                        | 3.04                       |
| 221                     | Bridgewater Wealth Management              | Bethesda, Md.           | 147.44                      | -18.09                       | 1.30                       | -31.14                        | 18.95                      |
| 222                     | Asset Strategies                           | Casper, Wyo.            | 147.10                      | -23.18                       | 0.70                       | -28.33                        | 7.18                       |
| 223                     | Financial Planning & Information Services  | De Pere, Wis.           | 144.25                      | -18.80                       | 0.29                       | -27.07                        | 11.34                      |
| 224                     | Smedley Financial Services                 | Salt Lake City, Utah    | 143.34                      | -32.93                       | 0.14                       | -29.74                        | -4.55                      |
| 225                     | Retirement Strategies                      | Jacksonville, Fla.      | 141.42                      | 19.97                        | 0.76                       | 11.59                         | 7.51                       |
| 226                     | Wechter Financial Services                 | Parsippany, N.J.        | 140.54                      | -3.08                        | 1.06                       | -6.02                         | 3.13                       |
| 227                     | Sensible Financial Planning and Management | Cambridge, Mass.        | 140.50                      | -9.78                        | 0.90                       | -27.71                        | 24.80                      |
| 228                     | Clientfirst Wealth Management              | Little Rock, Ark.       | 140.00                      | 64.71                        | 3.50                       | 2.94                          | 60.00                      |
| 229                     | Geier Asset Management                     | Marriottsville, Md.     | 139.06                      | -26.83                       | 0.78                       | -38.68                        | 19.33                      |
| 230                     | Financial Management Group                 | Cincinnati, Ohio        | 137.61                      | -14.87                       | 0.82                       | -20.47                        | 7.05                       |
| 231                     | Fernwood Investment Management             | Quincy, Mass.           | 136.68                      | -10.61                       | 1.18                       | -25.25                        | 19.59                      |
| 232                     | RB Capital Management                      | Fresno, Calif.          | 135.93                      | -10.27                       | 0.49                       | -19.88                        | 12.00                      |
| 233                     | Ward & Associates                          | Rancho Santa Fe, Calif. | 134.92                      | -31.14                       | 2.59                       | -33.79                        | 4.00                       |
| 234                     | Winch Advisory Services                    | Appleton, Wis.          | 134.90                      | -25.22                       | 0.42                       | -37.72                        | 20.07                      |
| 235                     | Sanders Financial Management               | Norcross, Ga.           | 132.67                      | -17.59                       | 0.78                       | -27.77                        | 14.09                      |
| 236                     | Copeland Wealth Management                 | Redlands, Calif.        | 131.63                      | -25.42                       | 0.59                       | -28.74                        | 4.65                       |
| 237                     | LifePlan Financial Group                   | Miamisburg, Ohio        | 131.45                      | -27.70                       | 0.31                       | -42.23                        | 25.15                      |
| 238                     | Lewis Financial Management                 | Raleigh, N.C.           | 131.43                      | -27.96                       | 1.21                       | -30.61                        | 3.81                       |
| 239                     | Results One Financial                      | Elmhurst, Ill.          | 129.59                      | -33.31                       | 0.33                       | -39.14                        | 9.58                       |
| 240                     | TABR Capital Management                    | Orange, Calif.          | 128.83                      | -18.53                       | 0.52                       | -19.84                        | 1.63                       |
| 241                     | Roof Advisory Group                        | Harrisburg, Pa.         | 128.00                      | 11.98                        | 1.33                       | -5.51                         | 18.52                      |
| 242                     | Hardy Reed Capital Advisors                | Tupelo, Miss.           | 127.83                      | 9.95                         | 0.86                       | 4.75                          | 4.96                       |
| 243                     | Crescent Sterling                          | Metairie, La.           | 127.56                      | -9.33                        | 0.71                       | -21.42                        | 15.38                      |
| 244                     | Stevens Wealth Management                  | Deerfield, Ill.         | 127.40                      | -2.91                        | 1.36                       | -10.14                        | 8.05                       |
| 245                     | Sather Financial Group                     | Victoria, Texas         | 126.09                      | -18.24                       | 0.88                       | 6.74                          | -23.40                     |
| 246                     | Pickler Wealth Advisors                    | Collierville, Tenn.     | 125.65                      | -16.24                       | 0.42                       | -15.68                        | -0.66                      |
| 247                     | Garnet Group                               | Boston, Mass.           | 125.61                      | -20.03                       | 1.29                       | -21.68                        | 2.11                       |
| 248                     | BondStreet Wealth Management               | Everett, Wash.          | 125.00                      | -22.36                       | 0.28                       | -39.61                        | 28.57                      |
| 249                     | Planned Solutions                          | Sacramento, Calif.      | 123.86                      | -34.24                       | 0.33                       | -33.37                        | -1.30                      |
| 250                     | Investors Asset Management                 | Plano, Texas            | 123.29                      | -16.80                       | 0.66                       | -19.48                        | 3.33                       |
| 251                     | Jentner Financial Group                    | Akron, Ohio             | 123.18                      | -33.79                       | 0.98                       | -34.32                        | 0.80                       |
| 252                     | Callan Capital                             | La Jolla, Calif.        | 123.00                      | -3.15                        | 2.12                       | -14.84                        | 13.73                      |
| 253                     | c5 Wealth Management                       | Great Falls, Va.        | 122.00                      | -2.40                        | 0.34                       | -45.78                        | 80.00                      |
| 254                     | A&F Financial Advisors                     | Charleston, W. Va.      | 121.49                      | -21.82                       | 0.81                       | -33.81                        | 18.11                      |
| 255                     | Tarpley & Underwood Financial Advisors     | Atlanta, Ga.            | 121.09                      | -21.79                       | 1.07                       | -16.94                        | -5.83                      |
| 256                     | WheelerFrost Associates                    | San Diego, Calif.       | 120.98                      | -25.32                       | 1.00                       | -25.94                        | 0.83                       |
| 257                     | Acorn Financial Services                   | Fairfax, Va.            | 120.64                      | -35.76                       | 0.15                       | -41.40                        | 9.63                       |
| 258                     | Trinity Financial Advisors                 | Chicago, Ill.           | 120.50                      | -34.79                       | 2.11                       | -31.36                        | -5.00                      |

Source: Discover y Database. \*Discretionary and nondiscretionary assets under management reported on Form ADV.

\*\*Average assets per client relationship. † Founded in 2007, not meaningful. ‡ Founded in 2008, not meaningful.

§ Exact number not provided.