

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.