

Forbes



MARKETS

The Top 100 Wealth Managers

RANK	FIRM	HEADQUARTERS	TOTAL ASSETS UNDER MGMT. (MIL)	ANNUAL AUM GROWTH (%)	EXECUTIVE
10	SHEPHERD KAPLAN, LLC	BOSTON, MA	\$10,276	-1%	DAVID SHEPHERD, MANAGING DIRECTOR
11	BROWNSON, REHMUS & FOXWORTH, INC.	MENLO PARK, CA	\$10,128	N/A	ROBERT LOVEMAN, PRESIDENT
12	MARINER WEALTH ADVISORS, LLC	LEAWOOD, KS	\$10,103	295%	MARTIN BICKNELL, CEO
13	INNOVEST PORTFOLIO SOLUTIONS, LLC	DENVER, CO	\$8,863	26%	RICHARD TODD, PRINCIPAL
14	CONVERGENT WEALTH ADVISORS, LLC	POTOMAC, MD	\$8,202	-3%	DOUGLAS WOLFORD, CEO
15	BEACON POINTE ADVISORS, LLC	NEWPORT BEACH, CA	\$7,359	18%	GARTH FLINT, CEO
16	MYCIO WEALTH PARTNERS, LLC	PHILADELPHIA, PA	\$7,003	8%	DAVID LEES, FOUNDING PARTNER
17	EVERETT HARRIS & COMPANY	LOS ANGELES, CA	\$6,749	6%	OLIVER CRARY, CEO
18	BUCKINGHAM ASSET MANAGEMENT, LLC	ST LOUIS, MO	\$6,631	18%	DAVID LEVIN, PRESIDENT
19	MERCER GLOBAL ADVISORS, INC.	SANTA BARBARA, CA	\$6,143	15%	DAVID BARTON, CEO
20	KLS PROFESSIONAL ADVISORS GROUP, LLC	NEW YORK, NY	\$5,814	3%	ROBERT SCHORR, CEO

Methodology

Data for the Top Wealth Managers list is compiled by our partners at RIA Database. Candidate firms qualify based on both quantitative and qualitative criteria. This year we expanded the list to 100 firms, and ranked them by assets under management for year-end 2014, reported as of March 31, 2015.

Members of the list must have manage at least 50% of their assets on behalf of retail clients, can not run a broker-dealer (they can be affiliated with one), can not be a bank (trust companies are permitted), and must be performing wealth management services. Firms can not have had any regulatory, civil or criminal disclosures.

The list looks beyond exclusively fee-only advisors because the RIA industry is evolving to incorporate more hybrid models as more reps break way from broker-dealers but carry along old business that includes some commission-based work.