

Wealth Management™

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2015 TOP 100 RIAs

Primary Business Name	Main Office Location	# Employees Give Advice	Total Accounts	HNW Individual Clients	Discretionary AUM	Total AUM
1. Arnerich Massena Inc.	Portland, Ore.	20	2,067	26-50%	\$542.4 million	\$24.4 billion
2. Creative Planning	Leawood, Kan.	127	42,107	26-50%	\$15.4 billion	\$15.5 billion
3. Edelman Financial Services LLC	Fairfax, Va.	194	63,400	11-25%	\$14.4 billion	\$14.4 billion
4. Moneta Group Investment Advisors LLC	Clayton, Mo.	100	22,916	51-75%	\$4.7 billion	\$14.1 billion
5. Oxford Financial Group Ltd.	Carmel, Ind.	30	7,069	76-99%	\$2.2 billion	\$13.8 billion
6. Comprehensive Financial Management LLC	Los Gatos, Calif.	8	28	11-25%	\$11.1 billion	\$11.1 billion
7. Plante Moran Financial Advisors	Southfield, Mich.	113	2,417	51-75%	\$5.9 billion	\$11.0 billion
8. Mariner Wealth Advisors LLC	Leawood, Kan.	50	18,835	26-50%	\$8.4 billion	\$10.1 billion
9. Shepherd Kaplan LLC	Boston	24	2,287	76-99%	\$2.1 billion	\$10.3 billion
10. GenSpring Family Offices	Jupiter, Fla.	143	8,397	26-50%	\$8.5 billion	\$9.8 billion
11. Ronald Blue & Co. LLC	Roswell, Ga.	157	17,675	26-50%	\$7.4 billion	\$8.3 billion
12. Convergent Wealth Advisors LLC	Potomac, Md.	42	3,499	76-99%	\$5.8 billion	\$8.2 billion
13. Beacon Pointe Advisors LLC	Newport Beach, Calif.	28	5,009	26-50%	\$3.4 billion	\$7.4 billion
14. Buckingham Asset Management LLC	St Louis, Mo.	100	12,322	51-75%	\$6.8 billion	\$7.0 billion
15. Mercer Global Advisors Inc.	Santa Barbara, Calif.	105	17,307	26-50%	\$6.0 billion	\$6.2 billion
16. Athena Capital Advisors LLC	Lincoln, Mass.	29	460	76-99%	\$5.1 billion	\$6.0 billion
17. Global Financial Private Capital LLC	Sarasota, Fla.	300	55,166	11-25%	\$5.3 billion	\$5.3 billion
18. Ballentine Partners	Waltham, Mass.	48	2,866	76-99%	\$2.3 billion	\$5.2 billion
19. The Colony Group LLC	Boston	65	6,585	76-99%	\$3.8 billion	\$5.1 billion

Methodology: REP magazine's "Top 100 RIAs of 2015" ranking was assembled using data from Meridian-IQ (in which Penton Media has a stake). Advisory firms are ranked by total assets under management. To land on the list, firms had to have a focus on financial and retirement planning for individual and high-net-worth clients, and institutional clients could not make up a substantial portion of their businesses. Finally, none of these firms are owned by a bank, broker/dealer or investment company.