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RIA
**SURVEY &
RANKING**
2024

FA's 2024 RIA RANKING

2023 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2023 ASSETS (\$MM)*	% GROWTH IN ASSETS 2022-2023	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
250	Blue Chip Partners	Farmington Hills, Mich.	1,279.74	21.65%	1.54	9.79%	10.80%
251	First Pacific Financial	Vancouver, Wash.	1,277.34	16.10%	1.15	13.17%	2.59%
252	BigSur Partners	Miami, Fla.	1,225.65	6.17%	53.29	-3.06%	9.52%
253	Delta Financial Group	Basking Ridge, N.J.	1,197.40	20.18%	1.46	9.32%	9.93%
254	Willis Johnson & Associates	Houston, Texas	1,167.58	30.57%	2.60	16.90%	11.69%
255	Regatta Capital Group	El Segundo, Calif.	1,162.61	24.82%	1.08	16.32%	7.31%
256	Benefit Financial Services Group	Irvine, Calif.	1,149.09	17.62%	1.39	12.35%	4.69%
257	Petersen Hastings Wealth Advisors	Kennewick, Wash.	1,123.54	21.19%	1.10	10.96%	9.22%
258	Straightline Group	Troy, Mich.	1,121.19	11.83%	0.45	8.97%	2.63%
259	CJM Wealth Advisors	Falls Church, Va.	1,117.62	1.12%	1.31	-2.19%	3.39%
260	RWV Wealth	Los Angeles, Calif.	1,113.38	15.86%	1.05	12.68%	2.82%
261	Janiczek Wealth Management	Denver, Colo.	1,109.94	17.97%	6.17	11.42%	5.88%
262	Retirement Investment Advisors	Oklahoma City, Okla.	1,109.66	19.34%	0.83	18.35%	0.83%
263	Isthmus Partners	Madison, Wis.	1,108.78	13.45%	3.20	10.17%	2.98%
264	Kowal Investment Group	Brookfield, Wis.	1,108.67	6.71%	0.80	8.02%	-1.22%
265	Destiny Wealth Partners #	Tavares, Fla.	1,101.00	18.01%	1.18	20.54%	-2.10%
266	Halpern Financial	Ashburn, Va.	1,098.49	32.53%	3.43	26.32%	4.92%
267	Agili, P.C.	Richmond, Va.	1,096.21	12.72%	3.12	12.07%	0.57%
268	Lynx Investment Advisory	Washington, D.C.	1,081.79	1.33%	4.92	-2.36%	3.77%
269	Palisade Asset Management	Minneapolis, Minn.	1,069.27	5.64%	3.75	-2.52%	8.37%
270	Abound Wealth Management	Franklin, Tenn.	1,065.31	33.15%	1.61	14.27%	16.52%
271	Rollins Financial Advisors	Atlanta, Ga.	1,063.38	25.35%	1.09	26.51%	-0.92%
272	Evermay Wealth Management ‡	Arlington, Va.	1,062.57	32.90%	2.08	8.50%	22.49%
273	MJP Wealth Advisors	Farmington, Conn.	1,056.63	22.24%	1.30	16.24%	5.16%
274	Total Wealth Planning	Blue Ash, Ohio	1,055.36	21.87%	1.48	9.93%	10.85%
275	Pinkerton Retirement Specialists	Coeur d'Alene, Idaho	1,033.38	9.28%	1.28	6.42%	2.68%
276	Delegate Advisors	Chapel Hill, N.C.	1,032.24	14.38%	27.16	29.43%	-11.63%
277	Moisand Fitzgerald Tamayo	Orlando, Fla.	1,028.56	14.10%	1.21	4.34%	9.36%
278	REDW Wealth	Albuquerque, N.M.	1,004.65	12.08%	2.29	10.54%	1.39%
279	Lake Street Private Wealth	Chicago, Ill.	1,000.80	25.67%	1.77	20.77%	4.06%

ASSET CATEGORY: \$500 MILLION TO < \$1 BILLION

280	Fermata Advisors	Sonoma, Calif.	973.85	32.71%	0.56	34.55%	-1.37%
281	Signet Financial Management	Parsippany, N.J.	949.40	13.07%	1.31	13.07%	0.00%
282	DiNuzzo Private Wealth	Beaver, Pa.	946.48	12.39%	1.17	13.64%	-1.10%
283	Verity Investment Partners	Beaufort, S.C.	938.78	11.75%	2.21	-1.14%	13.03%
284	Seasons of Advice Wealth Management	New York, N.Y.	931.81	18.06%	1.17	14.50%	3.10%
285	Rappaport Reiches Capital Management	Skokie, Ill.	928.00	21.47%	2.31	16.03%	4.69%
286	Financial Advisory Corporation	Grand Rapids, Mich.	913.27	14.77%	4.19	13.72%	0.93%
287	Buffington Mohr McNeal	Boise, Idaho	911.76	16.51%	1.47	10.68%	5.27%
288	SC&H Wealth	Sparks, Md.	908.92	23.25%	1.52	16.66%	5.64%
289	Hemington Wealth Management	Falls Church, Va.	894.45	4.16%	1.33	4.62%	-0.44%
290	Stage Harbor Financial	Needham, Mass.	876.60	13.08%	2.80	10.19%	2.62%

*Average assets per client relationship. **AUM is the combined totals for Evoke Advisors and Advanced Research Investment Solutions (merged as of 5/2020). †AUM based on fiscal year end 5/31/23. ‡AUM as of 2/24 as reported on latest ADV form. ††AUM as of 3/24 as reported on latest ADV form. †††AUM includes assets managed by Corient, and firms in which Corient has an investment. Not all assets are considered regulatory assets as defined in their Form ADV. \$AUM and client numbers are as of 12/31/23 for Wealthspire Advisors and its subsidiaries, separately registered investment advisors and subsidiary companies of NFP, an Aon company. §§Cary Street Partners Financial is the parent company to Cary Street Partners Investment Advisory. §§§Monument Capital Management doing business as Monument Wealth Management. # Destiny Wealth Partners' 2023 and 2022 AUM and Assets Per Client have been revised because of participant error. ## Certity Partners' Assets Per Client, % Growth In Assets Per Client and % Change In No. Of Clients have been revised because of participant error.

Opinions and estimates contained in this article are subject to change without notice, as are statements of financial market trends, which are based on current market conditions. This article originally appeared on *Financial Advisor* magazine's website on July/August 2024. All rights reserved. Charter Financial Publishing Network, Inc.

