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Monday, September 27, 2010

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Special Report
The Top RIAs

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The Up-and-Comers

Top fee-only emerging firms ranked by growth in discretionary AUM

Click firm name for company profile and contact info

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Rank	Firm name	Company website	Growth in discretionary assets, 2010 vs. 2008(\$)	% change in discretionary assets 2008-2010	Discretionary assets 2010	Discretionary assets 2008	Discretionary accounts	Total accounts
1	Pathstone Family Office LLC	pathstone.com	\$490.11M	N/A	\$490.11M		273	273
2	Granite Investment Advisors Inc.	graniteinvestmentadvisors.com	\$480.12M	N/A	\$480.12M		455	460
3	Globe Wealth Advisors	No website	\$474.58M	N/A	\$474.58M		46	46
4	Endurance Wealth Management Inc.	endurancewealth.com	\$409.00M	N/A	\$409.00M		638	638
5	Oxford Financial Group Ltd.	ofg ltd.com	\$371.98M	N/A	\$371.98M		814	4,844
6	Eton Advisors LP	etonadvisors.com	\$366.61M	N/A	\$366.61M		58	198
7	The Harbor Group Inc.	harbargroup.com	\$360.88M	N/A	\$379.73M	\$18.85M	430	529
8	Daintree Advisors LLC	daintreadvisors.com	\$314.00M	N/A	\$314.00M		11	11
9	Glassman Wealth Services LLC	glassmanwealth.com	\$309.77M	N/A	\$309.77M		470	470
10	Congress Wealth Management LLC	congresswealth.com	\$300.00M	N/A	\$300.00M		330	330
11	Trinity Portfolio Advisors LLC	trinityportfolio.com	\$283.92M	N/A	\$283.92M		1,170	1,170
12	Yeske Buie Inc.	live-big.us	\$265.35M	N/A	\$265.35M		693	750
13	Camden Capital Management LLC	camdencapital.com	\$250.00M	N/A	\$500.00M	\$250.00M	399	404
14	Lyons Wealth Management	lyonswealth.com	\$242.52M	N/A	\$242.52M		597	597
15	Massey Quick & Co. LLC	masseyquick.com	\$239.93M	N/A	\$275.06M	\$35.13M	79	256
16	Stillwater Capital Advisors LLC	stillwateradv.com	\$220.00M	N/A	\$220.00M		540	990
17	Carnegie Investment Counsel	carnegie-capital.com	\$213.23M	N/A	\$213.23M		851	851
18	HM Capital Management LLC	hmcapitalmanagement.com	\$209.29M	N/A	\$441.49M	\$232.20M	546	557

19	Deerfield Financial Advisors Inc.	deerfieldfa.com	\$207.64M	N/A	\$289.19M	\$81.55M	632	784
20	Barrington Financial Advisors Inc.	barringtonfinancial.com	\$200.00M	N/A	\$200.00M		N/A	1,665
21	Evermay Wealth Management LLC	evermaywealth.com	\$198.56M	N/A	\$198.56M		N/A	472
22	Fineware, Inc. (d.b.a. Wealthcare Capital Management)	wealthcarecapital.com	\$197.41M	N/A	\$254.03M	\$56.62M	N/A	1,541
23	Timber Creek Capital Management LLC	timbercreek-capital.com	\$196.68M	N/A	\$229.68M	\$33.00M	N/A	126
24	Keats Connelly & Associates LLC	keatsconnelly.com	\$191.80M	N/A	\$191.80M		N/A	321
25	CKW Financial Group LLC	No Website	\$190.00M	N/A	\$190.00M		N/A	119
26	Capital Advisory Group	thecapgroup.com	\$184.61M	N/A	\$240.92M	\$56.31M	N/A	331
27	All Star Financial Inc.	allstarfinancial.com	\$167.00M	N/A	\$457.00M	\$290.00M	N/A	436
28	Patriot Investment Management Group Inc.	patriotinvestment.com	\$166.17M	N/A	\$344.59M	\$178.43M	N/A	3,158
29	Ruedi Holder & Associates Inc.	No Website	\$165.73M	N/A	\$165.73M		N/A	833
30	Schiavi & Dattani	sdfinancialadvisors.com	\$165.14M	N/A	\$165.14M		N/A	124
31	Roundview Capital LLC	roundviewcapital.com	\$163.04M	N/A	\$164.30M	\$1.27M	N/A	585
32	Stack Financial Management Inc.	stackfinancialmanagement.com	\$162.66M	N/A	\$498.80M	\$336.13M	N/A	743
33	Willow Creek Financial Services Inc.	wcfsinc.com	\$158.52M	N/A	\$427.09M	\$268.57M	N/A	1,045
34	Garde Capital Inc.	gardecapital.com	\$156.73M	N/A	\$156.73M		N/A	172
35	Trovena LLC	trovena.com	\$155.01M	N/A	\$305.01M	\$150.00M	N/A	884
36	Glenmore Advisors LLC	glenmoreadvisors.com	\$150.00M	N/A	\$150.00M		N/A	14
37	TJT Capital Group LLC	tjtcapital.com	\$147.29M	N/A	\$147.29M		N/A	645
38	Azimuth Capital Management LLC	azimuthcap.com	\$147.15M	N/A	\$457.48M	\$310.32M	N/A	467
39	Certified Planners Inc.	certifiedplannersinc.com	\$146.94M	N/A	\$146.94M		N/A	1,134
40	C5 Wealth Management LLC	c5wm.com	\$142.42M	N/A	\$142.42M		N/A	983
41	Clearview Investment Partners LLC	cviewip.com	\$140.54M	N/A	\$140.54M		N/A	552
42	Ferguson Capital Management Inc.	fergusoncapital.com	\$139.53M	N/A	\$296.00M	\$156.47M	N/A	370
43	AFW Wealth Advisors	afw.com	\$136.97M	N/A	\$136.97M		N/A	714
44	Smith Shellnut Wilson	ssw1776.com	\$136.36M	N/A	\$497.62M	\$361.27M	N/A	353
45	Prosper Advisors LLC	prosperadv.com	\$135.49M	N/A	\$196.88M	\$61.40M	N/A	334
46	Argos Wealth Advisors LLC	argoswealth.com	\$135.19M	N/A	\$479.90M	\$344.71M	N/A	1,197
47	Johnson Lyman Wealth Advisors	jwealth.com	\$133.82M	N/A	\$133.82M		N/A	119
48	The Insight Group Inc.	insightgroup.com	\$132.60M	N/A	\$132.60M		N/A	731


49	Cooper/Haims Advisors LLC	cooperhaims.com	\$132.29M	N/A	\$312.29M	\$180.00M	N/A	225
50	Timonier Family Office Ltd.	timonier.com	\$128	N/A	\$128.00M		N/A	110

Methodology

RIA Database RIA firms based on the following criteria:


1. Less than \$500 million in discretionary assets under management as of June 30, 2010.
2. Growth in discretionary assets under management from December 31, 2008 to June 30, 2010 as reported to and defined by the Security and Exchange Commission.
3. Greater than 50% of their business must serve the retail marketplace.
4. They must provide financial planning services, portfolio management for individuals, or conduct due diligence on third party advisers.
5. They must not be doing business as a broker/dealer, bank or insurance company.
6. They must not charge commissions, or have registered representative employees at the firm.
7. A dominant portion of their business must not be invested in proprietary products.

Source: RIADatabase.com



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