

FINANCIAL ADVISOR



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# TOP 50 FASTEST-GROWING FIRMS

GROWTH RANK	FIRM NAME	LOCATION	YEAR END 2014 ASSETS (\$MM)	% GROWTH IN ASSETS 2013-2014	2014 CLIENTS	% GROWTH IN ASSETS PER CLIENT
1	Capital Wealth Advisors	Naples, Fla.	249.13	7,364.17	171	118.25
2	Keel Point	Huntsville, Ala.	1,429.88	358.54	800	186.59
3	Conrad Siegel Investment Advisors	Harrisburg, Pa.	2,828.30	245.63	139	168.55
4	AJ Wealth	New York, N.Y.	236.13	164.57	110	116.47
5	Frontier Wealth Management	Kansas City, Mo.	1,226.00	155.95	1,180	98.47
6	Millares Asset Management	Coral Gables, Fla.	227.94	145.12	44	55.99
7	LeafHouse Financial Advisors	Austin, Texas	721.10	128.99	125	183.95
8	Forbes Family Trust	New York, N.Y.	3,913.82	118.55	51	54.27
9	Larson Financial	Saint Louis, Mo.	792.62	110.17	2,400	31.36
10	Platinum Wealth Partners	Tampa, Fla.	405.00	102.50	1,000	102.50
11	Hemington Wealth Management	Tysons, Va.	340.00	100.00	200	20.00
12	Syntal Capital Partners	Midland, Texas	464.20	98.38	100	78.54
13	Sheaff Brock Investment Advisors	Indianapolis, Ind.	1,156.00	86.14	1,840	11.68
14	Park Place Capital Management	Milwaukee, Wis.	790.91	82.60	91	22.40
15	Wealth Health	Roseland, N.J.	385.46	79.72	200	-28.11
16	Claro Advisors	Boston, Mass.	169.98	77.06	200	32.80
17	Evensky & Katz / Foldes Financial Wealth Management	Coral Gables, Fla.	1,558.00	72.54	881	-25.78
18	Atlas Private Wealth Management	North Adams, Mass.	1,039.14	72.14	1,800	29.11
19	Innovest Portfolio Solutions	Denver, Colo.	8,862.58	61.58	233	49.10
20	Robertson, Grieger and Thoele	Dallas, Texas	3,754.41	60.65	505	28.84
21	Horter Investment Management	Cincinnati, Ohio	1,118.72	59.78	8,143	4.62
22	Timmons Wealth Management	Attleboro, Mass.	12.24	58.36	41	8.15
23	Creative Planning	Leawood, Kan.	14,330.72	57.39	8,500	24.06
24	Gradient Investments	Arden Hills, Minn.	696.72	55.75	4,676	6.59
25	CSA Financial Advisors	Cincinnati, Ohio	108.02	53.07	139	51.97
26	Aureus Asset Management	Boston, Mass.	1,335.00	52.57	70	30.78
27	Granite Financial Group	Brookfield, Wis.	74.60	52.24	380	-38.70
28	Advocacy Wealth Management	Atlanta, Ga.	415.00	50.91	500	20.73
29	Bridgewater Wealth & Financial Management	Bethesda, Md.	702.94	49.70	254	28.49
30	Mission Creek Capital Partners	San Francisco, Calif.	82.02	48.91	88	35.37
31	Confluence Wealth Management	Portland, Ore.	561.20	47.68	394	14.32
32	Van Hulzen Asset Management	El Dorado Hills, Calif.	575.00	45.20	370	29.50
33	Financial Management Strategies	Valley View, Ohio	298.32	45.11	639	-6.21
34	Palisade Investments	Stateline, Nev.	142.00	44.90	120	8.67
35	The Mather Group	Oakbrook Terrace, Ill.	625.74	43.65	450	14.92
36	Aveo Capital Partners	Greenwood Village, Colo.	435.78	43.08	684	-40.59
37	Covenant Wealth Advisors	Williamsburg, Va.	186.58	42.54	146	8.37
38	Parallel Advisors	San Francisco, Calif.	715.44	41.82	900	-5.45
39	Advisor Financial Services	Woodstock, Ga.	473.15	41.76	930	37.95
40	ARGI Financial Group	Louisville, Ky.	1,068.12	41.40	2,345	-8.17
41	Pinnacle Advisory Group	Columbia, Md.	1,400.00	40.00	900	30.82
42	Titleist Asset Management	San Antonio, Texas	210.00	40.00	400	31.25
43	Hartland & Co.	Cleveland, Ohio	2,264.16	38.26	532	-12.16
44	Advisors Capital Management	Ridgewood, N.J.	1,052.35	37.78	1,900	8.77
45	1st Portfolio Wealth Advisors	Fairfax, Va.	210.00	37.25	167	19.17
46	Dynasty Wealth Management	New York, N.Y.	1,848.85	36.28	40	12.43
47	First Republic Investment Management	San Francisco, Calif.	35,299.51	35.82	7,500	11.04
48	BBR Partners	New York, N.Y.	8,884.30	34.75	104	20.50
49	ARS Wealth Advisors	Saint Petersburg, Fla.	408.85	34.60	337	25.41
50	Anthony Smith Advisors	Atlanta, Ga.	297.94	34.27	155	15.21