

Nick Murray

Ask Better Questions

▶ Andy Gluck

The Legal Brawl For Albridge

▶ The Name Game

When Rebranding Makes Sense

Knowledge for the Sophisticated Advisor

FINANCIAL ADVISOR

July 2006

The Golden Age
of
Growth

Our inaugural ranking
of leading RIA firms.

www.fa-mag.com

Asset Category: \$300 Million To \$500 Million

Growth Rank In Category	#	FIRM NAME	LOCATION	Growth in Assets	Year-end 2005	Assets Per Client	Growth In Assets Per	Rank In
				2004-2005	2005	Relationship	Relationship	Assets Per Relationship
				%	Assets (\$MM)	(\$MM)	%	OVERALL
	1	Glenn Woody Financial Consultants Inc.	Costa Mesa, Calif.	148.96	318.41	1.13	149.84	165
	2	Creative Planning	Overland Park, Kan.	123.45	342.00	1.25	196.03	141
	3	Golub Group, LLC	San Mateo, Calif.	53.49	418.26	1.82	160.27	83
	4	Fairway Wealth Management LLC	Westlake, Ohio	49.25	300.00	6.00	76.12	19
	5	Jackson Financial Management	Newport Beach, Calif.	44.12	361.44	1.56	54.06	106
	6	CFS Investment Advisory Services	Totowa, N.J.	43.51	411.49	1.27	52.34	138
	7	WMS Partners, LLC	Baltimore, Md.	38.87	308.94	1.87	41.39	79
	8	Gemmer Asset Management LLC	Walnut Creek, Calif.	34.79	351.73	0.89	49.05	211
	9	Capital Performance Advisors, Inc.	Walnut Creek, Calif.	31.27	456.46	0.85	44.44	221
	10	Brightworth, LLC	Norcross, Ga.	26.88	497.70	2.65	40.38	50
	11	Obermeyer Asset Mgt. Company	Aspen, Colo.	26.69	455.00	1.60	44.92	102
	12	Spero-Smith Investment Advisers, Inc.	Cleveland, Ohio	24.65	303.22	1.14	28.40	161
	13	Rowland Carmichael Advisors, Inc.	Scottsdale, Ariz.	22.21	359.33	2.29	28.43	60
	14	Summit Financial Strategies, Inc.	Columbus, Ohio	22.16	332.13	1.15	40.70	160
	15	The Harbor Group, Inc.	Bedford, N.H.	22.07	455.21	0.80	28.07	237
	16	Sierra Investment Management, Inc.	Santa Monica, Calif.	21.33	455.00	0.76	31.44	251
	17	Shine Investment Advisory Services Inc.	Lone Tree, Colo.	20.82	365.16	2.10	27.07	69
	18	First Capital Equities	Great Neck, N.Y.	20.27	350.00	1.29	50.90	136
	19	The Welch Group, LLC	Birmingham, Ala.	19.33	306.81	1.15	29.65	158
	20	Petersen Hastings Investment Mgt.	Kennewick, Wash.	18.80	308.50	0.65	25.29	275
	21	Strategic Wealth Management Group	Columbia, Md.	18.34	432.27	0.82	24.41	232
	22	L.J. Altfest & Co., Inc.	New York, N.Y.	17.41	350.00	1.35	35.09	125
	23	Truepoint Capital	Cincinnati, Ohio	16.43	497.17	2.02	34.89	71
	24	Sigma Investment Counselors, Inc.	Southfield, Mich.	15.93	444.00	1.04	22.75	183
	25	Charles D. Haines, LLC	Birmingham, Ala.	14.05	440.02	2.19	22.00	64
	26	Modern Portfolio Management, Inc.	Maumee, Ohio	12.96	305.00	0.16	12.96	366
	27	Foster & Motley, Inc.	Cincinnati, Ohio	12.90	455.00	2.05	41.89	70
	28	Legacy Wealth Management, Inc.	Memphis, Tenn.	12.90	382.10	1.01	12.30	191
	29	Blankinship & Foster	Solana Beach, Calif.	12.76	303.17	1.20	21.67	152
	30	Briaud Financial Planning, Inc.	Bryan, Texas	12.09	349.06	1.44	9.32	118
	31	Evensky & Katz	Coral Gables, Fla.	10.89	474.50	2.37	21.98	57
	32	Sadoff Investment Management LLC	Milwaukee, Wis.	10.31	386.40	0.86	12.76	218
	33	The Monitor Group, Inc.	McLean, Va.	9.06	341.37	1.60	-1.13	103
	34	John E. Sestina and Company	Columbus, Ohio	9.02	447.00	1.63	28.85	99
	35	M.J. Smith and Associates	Englewood, Colo.	8.64	440.00	0.77	0.52	245
	36	Henssler Asset Management, LLC	Kennesaw, Ga.	6.16	305.75	3.12	19.16	41
	37	Arthur M. Cohen & Associates LLC	Northbrook, Ill.	4.88	430.00	3.74	14.00	33
	38	Fieldstone Financial Mgt. Group	Boston, Mass.	2.83	436.00	2.97	7.03	45
	39	Braver Wealth Management	Newton, Mass.	2.53	334.40	1.03	4.42	186
	40	Highland Capital Management LLC	Seattle, Wash.	1.49	330.07	6.35	-0.46	18
	41	American Economic Planning Group Inc.	Watchung, N.J.	-11.55	486.50	1.10	-10.15	174

Asset Category: \$100 Million To \$300 Million

Growth Rank In Category	#	FIRM NAME	LOCATION	Growth in Assets	Year-end 2005	Assets Per Client	Growth In Assets Per	Rank
				2004-2005	2005	Relationship	Relationship	Assets Per Relationship
				%	Assets (\$MM)	(\$MM)	%	OVERALL
	1	Centara Capital	San Diego, Calif.	400.00	125.00	0.21	983.33	359
	2	Investors Capital Management	Menlo Park, Calif.	212.46	105.30	0.66	358.93	272
	3	Baron Financial Group	Fair Lawn, N.J.	212.20	128.00	1.07	420.33	176
	4	JWA Financial Group, Inc.	Dallas, Texas	122.25	171.01	1.45	318.14	117
	5	Crestwood Advisors LLC	Boston, Mass.	98.77	161.00	4.88	285.48	25
	6	Patriot Wealth Management, Inc.	Houston, Texas	96.07	274.50	3.87	220.34	32
	7	Pinnacle Fund Management, Inc.	Chicago, Ill.	71.67	103.00	0.09	128.89	374
	8	The Financial Network Group, Ltd.	Cincinnati, Ohio	70.37	278.56	0.07	103.49	376
	9	Wealth Care Group Asset Management	Lafayette, La.	66.67	100.00	1.00	150.00	194
	10	Demicell Wealth Managers, Inc.	Pueblo, Colo.	65.26	109.80	2.61	112.48	52
	11	Warren, Averett, Kimbrough, & Marino	Birmingham, Ala.	58.92	225.79	1.79	89.19	87
	12	Proctor Financial, Inc.	Wellesley, Mass.	57.43	124.25	0.88	128.38	212
	13	Everhart Financial Group Inc.	Dublin, Ohio	54.55	170.00	0.42	93.18	316
	14	The Lasecke Weil Wealth Advisory Group	Palo Alto, Calif.	54.43	142.00	1.05	20.11	181
	15	Sovereign Wealth Management, Inc.	Memphis, Tenn.	54.37	172.99	2.01	83.09	73
	16	Meg Green & Associates	North Miami Beach, Fla.	52.94	130.00	0.52	83.53	300