

RIA LEADERS 2022: TOP 150 FEE-ONLY RIA FIRMS

RIA in a Box compiled the below rankings of fee-only registered investment advisors that provide financial planning services from SEC Form ADV filings this summer using criteria designed by Financial Planning.

RANK	FIRM NAME	LOCATION	AUM	CLIENT ACCOUNTS	ADVISORS	EMPLOYEES
1	Chevy Chase Trust Company	Bethesda, MD	\$39,184,723,679	4529	34	96
2	Moneta Group Investment Advisors	St. Louis, MO	\$32,888,762,887	33261	163	395
3	Cresset Asset Management	Chicago, IL	\$22,967,857,515	13727	135	298
4	Pathstone	Englewood, NJ	\$22,604,852,072	12921	67	211
5	Capital Strategies Investment Group	Oakbrook Terrace, IL	\$20,374,972,272	878	6	22
6	Bahl & Gaynor	Cincinnati, OH	\$17,565,552,525	2536	0	35
7	Aspiriant	Los Angeles, CA	\$15,477,032,000	10471	69	203
8	Advanced Research Investment Solutions	Los Angeles, CA	\$15,003,061,146	343	3	7
9	Ep Wealth Advisors	Torrance, CA	\$14,670,000,000	18365	62	257
10	Fci Advisors	Overland Park, KS	\$14,471,827,462	13107	40	61
11	Wealthspire Advisors	New York, NY	\$14,321,155,536	4586	110	184
12	We Family Offices	Miami, FL	\$13,382,462,057	96	32	53
13	Savant Wealth Management	Rockford, IL	\$13,130,277,826	7818	117	250
14	Loring, Wolcott & Coolidge Fiduciary Advisors	Boston, MA	\$12,619,340,883	3202	12	99
15	Fiduciary Counselling	St Paul, MN	\$11,435,637,725	1648	18	78
16	Clearstead; Hartland & Co.	Cleveland, OH	\$11,225,683,077	4576	9	91
17	Homrich Berg	Atlanta, GA	\$11,082,920,997	10198	51	146
18	Ballentine Partners	Waltham, MA	\$10,519,787,346	5251	63	79
19	Ira Group	Atlanta, GA	\$9,847,736,267	532	12	15
20	Mill Creek Capital Advisors	Conshohocken, PA	\$9,436,962,965	372	22	37
21	Cv Advisors	Aventura, FL	\$9,406,618,249	1639	0	51
22	The Mather Group	Chicago, IL	\$8,579,759,071	12561	78	128
23	Ferguson Wellman Capital Management	Portland, OR	\$8,200,257,802	3585	24	57
24	Heber Fuger Wendin	Bloomfield, MI	\$7,940,915,588	281	8	11
25	Conrad Siegel Investment Advisors	Harrisburg, PA	\$7,888,019,145	761	25	25

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26	Pinnacle Associates	New York, NY	\$7,746,705,571	5133	19	61
27	Ropes Wealth Advisors	Boston, MA	\$7,502,868,640	3332	9	37
28	Valeo Financial Advisors	Carmel, IN	\$7,277,845,068	14264	71	120
29	Wetherby Asset Management	San Francisco, CA	\$7,272,831,284	3525	26	79
30	Modera Wealth Management	Westwood, NJ	\$6,950,534,211	8913	56	87
31	Seven Post Investment Office	San Francisco, CA	\$6,937,029,448	183	12	20
32	East End Advisors	New York, NY	\$6,920,578,903	36	0	18
33	R M Davis	Portland, ME	\$6,804,970,153	5755	19	50
34	H.M. Payson	Portland, ME	\$6,751,331,883	3376	15	32
35	Altair Advisers	Chicago, IL	\$6,683,259,970	808	0	60
36	Heck Capital Advisors	Rhineland, WI	\$6,674,670,715	3376	16	19
37	Coho Partners	Berwyn, PA	\$6,660,600,000	1234	2	33
38	Guided Choice Asset Management	Reno, NV	\$6,653,568,432	105439	0	21
39	Orgel Wealth Management	Altoona, WI	\$6,606,699,000	9064	25	67
40	Clear Investment Research	Alpharetta, GA	\$6,584,884,189	187	3	5
41	Northwest Capital Management	Lake Oswego, OR	\$6,487,085,957	1266	8	17
42	Gofen And Glossberg	Chicago, IL	\$6,479,223,660	3573	15	37
43	Arlington Partners	Birmingham, AL	\$6,427,792,177	928	13	39
44	Congress Wealth Management	Boston, MA	\$6,320,377,508	10073	36	77
45	Regentatlantic	Morristown, NJ	\$6,205,189,466	2131	44	71
46	Greenspring Advisors	Towson, MD	\$6,126,230,881	2276	17	25
47	Bradley Foster & Sargent	Hartford, CT	\$6,124,652,315	3640	9	48
48	Dowling & Yahnke	San Diego, CA	\$6,113,330,197	4834	25	56
49	Plancorp	Saint Louis, MO	\$6,077,964,861	6116	30	68
50	Columbia Pacific Wealth Management	Seattle, WA	\$6,062,687,271	4850	30	39

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51	Aureus Asset Management	Boston, MA	5,995,213,074	745	3	13
52	Nextcapital Advisers	Chicago, IL	5,952,847,460	48261	5	22
53	Balasa Dinverno Foltz	Itasca, IL	5,917,746,495	6756	45	47
54	Rgt Wealth Advisors	Dallas, TX	5,751,140,026	4575	25	68
55	Hm Capital Management	Clayton, MO	5,693,648,672	616	6	9
56	Wms Partners	Towson, MD	5,674,250,389	648	32	76
57	Portola Partners	Menlo Park, CA	5,571,108,837	1719	17	27
58	The Bollard Group	Boston, MA	5,453,735,112	498	1	28
59	Iron Capital Advisers	Atlanta, GA	5,452,190,824	175	2	6
60	Parallel Advisers	San Francisco, CA	5,443,156,513	10244	37	74
61	Brightworth	Atlanta, GA	5,364,746,988	7498	29	79
62	Marcuard Family Office	Zurich, NA	5,308,329,500	356	0	31
63	Soltis Investment Advisers	St. George, UT	5,199,963,238	2624	24	40
64	Kore Private Wealth	New York, NY	5,121,738,954	5836	13	27
65	Evanson Asset Management	Na, NA	5,085,141,616	4509	6	6
66	Index Fund Advisers	Irvine, CA	4,937,682,218	6355	16	48
67	Laird Norton Wealth Management	Seattle, WA	4,869,125,652	2060	37	90
68	Mission Wealth Management	Santa Barbara, CA	4,815,109,612	6591	40	76
69	Zhang Financial	Portage, MI	4,784,376,786	5045	15	35
70	Jmg Financial Group	Downers Grove, IL	4,715,950,000	4262	32	56
71	Truepoint	Cincinnati, OH	4,642,982,542	7095	30	75
72	Balentine	Atlanta, GA	4,598,455,973	2897	1	43
73	F L Putnam Investment Management	Wellesley, MA	4,547,177,967	3635	31	63
74	Northeast Financial	Westport, CT	4,524,576,000	1527	2	8
75	Camden Capital	North Palm Beach, FL	4,504,003,393	4327	21	35

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76	Winthrop Capital Management	Carmel, IN	\$4,474,430,179	772	3	24
77	Inverness Counsel	New York, NY	\$4,468,951,722	1,037	10	28
78	R.H. Bluestein & Co	Birmingham, MI	\$4,449,016,828	1,846	9	28
79	Alesco Advisors	Pittsford, NY	\$4,403,996,823	1,397	13	21
80	Exencial Wealth Advisors	Oklahoma City, OK	\$4,360,545,533	4,065	45	99
81	Becker Capital Management	Portland, OR	\$4,356,284,397	1,583	16	30
82	Advus Financial Partners	Lake Mary, FL	\$4,355,688,612	743	7	13
83	Brownson, Rehms & Foxworth	Chicago, IL	\$4,298,880,780	3,325	16	21
84	Parsec Financial	Asheville, NC	\$4,226,304,258	6,171	31	73
85	Resolute Partners Group	San Francisco, CA	\$4,226,274,364	169	4	5
86	Covington Capital Management	Los Angeles, CA	\$4,204,188,593	1,716	0	25
87	Clifford Swan Investment Counselors	Pasadena, CA	\$4,186,718,533	2,527	12	30
88	Crestone Asset Management	Boulder, CO	\$4,174,504,233	665	23	54
89	Waldron Private Wealth	Bridgeville, PA	\$4,137,857,410	2,463	32	35
90	Pure Financial Advisors	San Diego, CA	\$4,084,060,108	3,471	39	102
91	Prio Wealth	Boston, MA	\$4,081,461,007	1,679	11	32
92	Stonegate Investment Group	Birmingham, AL	\$4,078,616,982	2,262	12	14
93	Advance Capital Management	Southfield, MI	\$4,069,536,806	12,532	29	54
94	Carnegie Investment Counsel	Pepper Pike, OH	\$3,981,844,794	6,217	34	53
95	Veratis Advisors	Cary, NC	\$3,981,673,216	400	3	7
96	Evergreen Capital Management	Bellevue, WA	\$3,934,659,838	2,335	17	30
97	Mccutchen Group	Seattle, WA	\$3,909,225,169	1,186	0	21
98	Reynders, Mcveigh Capital Management	Boston, MA	\$3,904,642,023	822	22	34
99	Mainstay Capital Management	Grand Blanc, MI	\$3,858,741,129	3,838	19	29
100	Westmount Asset Management	Los Angeles, CA	\$3,837,485,441	4,164	20	33

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101	Destination Wealth Management	Walnut Creek, CA	\$3,809,515,164	5,275	30	50
102	Boston Financial Management	Boston, MA	\$3,792,904,255	2,277	20	45
103	Tci Wealth Advisors	Tucson, AZ	\$3,764,466,869	8,741	24	55
104	Buckhead Capital Management	Atlanta, GA	\$3,718,219,981	233	9	12
105	Sym Financial Advisors	Winona Lake, IN	\$3,706,905,162	4,163	24	62
106	Andersen	Mclean, VA	\$3,696,945,000	331	11	1148
107	Southeast Asset Advisors	Thomasville, GA	\$3,689,542,420	1,246	9	13
108	Hamilton Capital	Columbus, OH	\$3,634,513,893	7,210	44	62
109	Heritage Investors Management Corp	Bethesda, MD	\$3,615,921,442	1,342	6	16
110	Willis Investment Counsel	Gainesville, GA	\$3,610,051,787	421	4	11
111	Sand Hill Global Advisors	Palo Alto, CA	\$3,604,693,870	1,742	14	31
112	Tfo Phoenix	Phoenix, AZ	\$3,575,981,952	1,536	23	53
113	Moss Adams Wealth Advisors	Seattle, WA	\$3,561,560,865	3,859	19	62
114	Cm Wealth Advisors	Beachwood, OH	\$3,533,968,481	552	4	21
115	Salem Investment Counselors	Winston Salem, NC	\$3,500,685,568	2,244	7	18
116	Dyson Capital Advisors	Alexandria, VA	\$3,495,363,598	71	3	28
117	Wescott Financial Advisory Group	Philadelphia, PA	\$3,452,848,520	3,212	28	51
118	Twin Focus Capital Partners	Boston, MA	\$3,443,575,867	124	22	37
119	The Clarius Group	Seattle, WA	\$3,443,504,567	809	13	32
120	Roosevelt Investments	New York, NY	\$3,437,886,584	4,704	11	33
121	Abacus Wealth Partners	Santa Monica, CA	\$3,430,572,600	5,467	52	65
122	Circle Wealth Management	Summit, NJ	\$3,420,602,235	1,178	7	14
123	Anchor Capital Advisors	Boston, MA	\$3,415,082,456	3,684	17	47
124	Matter Family Office	Clayton, MO	\$3,402,186,839	210	15	41
125	Foster Group	West Des Moines, IA	\$3,393,383,529	4,626	36	65

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126	Accredited Investors Wealth Management	Edina, MN	\$3,383,260,611	4,416	4	49
127	Palladium Registered Investment Advisors	Norfolk, VA	\$3,370,776,796	2,579	11	31
128	Paul Comstock Partners	Houston, TX	\$3,365,393,181	111	9	14
129	Heritage Wealth Advisors	Richmond, VA	\$3,325,396,139	1,297	13	26
130	Dynamic Wealth Advisors	Phoenix, AZ	\$3,305,081,643	10,578	70	116
131	Cardea Capital Group	Atlanta, GA	\$3,250,444,951	123	3	5
132	Zwj Investment Counsel	Atlanta, GA	\$3,216,846,062	1,995	11	17
133	Mozaic	Beverly Hills, CA	\$3,202,559,896	75	0	14
134	Chicago Capital	Chicago, IL	\$3,154,505,579	1,452	6	10
135	Envoi	Minneapolis, MN	\$3,121,409,851	1,407	8	13
136	Halbert Hargrove	Long Beach, CA	\$3,030,982,898	4,099	34	44
137	Beaumont Financial Partners	Needham, MA	\$3,027,042,866	3,616	13	24
138	Constellation Wealth Advisors	Cincinnati, OH	\$3,018,105,133	1,827	17	25
139	Sage Financial Group	West Conshohocken, PA	\$3,015,929,198	3,500	14	26
140	Sentry Advisors	San Francisco, CA	\$2,965,491,132	527	4	4
141	Barrett Asset Management	New York, NY	\$2,937,336,469	738	0	18
142	Graypoint	Albany, NY	\$2,900,542,418	450	23	46
143	True North Advisors	Dallas, TX	\$2,871,743,854	3,331	15	37
144	Verdence Capital Advisors	Hunt Valley, MD	\$2,837,780,043	4,790	21	38
145	Cardinal Capital Management	Winnipeg, NA	\$2,836,149,020	6,605	1	34
146	Private Ocean	San Rafael, CA	\$2,832,184,409	3,655	23	41
147	Radnor Financial Advisors	Wayne, PA	\$2,814,388,473	2,588	11	23
148	Steele Capital Management	Dubuque, IA	\$2,811,200,716	3,800	10	13
149	Kunath Karren Rinne & Atkin	Seattle, WA	\$2,763,108,238	521	3	7
150	Performance Wealth	Hinsdale, IL	\$2,755,132,246	1,675	8	10