

FINANCIAL ADVISOR



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TOP 50

FASTEST-GROWING FIRMS

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GROWTH RANK	FIRM NAME	LOCATION	2021 CLIENTS	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	% GROWTH IN ASSETS PER CLIENT
1	Wealth Enhancement Advisory Services	Plymouth, Minn.	39,243	52,608.71	116.82%	30.45%
2	Marcum Wealth	Cleveland, Ohio	2,433	2,171.46	110.40%	22.97%
3	Cresset Capital	Chicago, Ill.	1,602	22,967.86	96.69%	16.64%
4	SteelPeak Wealth	Woodland Hills, Calif.	1,576	2,163.66	96.01%	79.22%
5	Creative Planning	Overland Park, Kan.	48,198	133,830.63	92.61%	63.76%
6	Beacon Pointe Advisors	Newport Beach, Calif.	12,483	23,674.54	90.28%	-10.07%
7	Robertson Stephens Wealth Management	San Francisco, Calif.	631	3,930.99	87.53%	24.82%
8	Sequoia Financial Group	Akron, Ohio	5,546	10,090.92	81.90%	22.14%
9	F3 Financial Advisors	Indianapolis, Ind.	156	606.19	79.96%	134.18%
10	XML Financial Group	Rockville, Md.	2,022	2,257.74	77.54%	24.50%
11	Lake Street	Chicago, Ill.	525	880.78	72.78%	14.20%
12	Mercer Global Advisors	Denver, Colo.	23,620	34,011.52	71.17%	23.17%
13	Axxcess Wealth Management	Carlsbad, Calif.	4,581	3,588.52	71.15%	138.44%
14	Foundations Investment Advisors	Phoenix, Ariz.	12,186	3,177.66	70.84%	17.77%
15	Cabana Asset Management	Fayetteville, Ark.	370	2,487.88	67.93%	3200.43%
16	Cerity Partners	New York, N.Y.	5,713	44,670.53	67.25%	11.62%
17	Coldstream Wealth Management	Bellevue, Wash.	2,372	7,219.30	67.02%	6.89%
18	JFG Wealth Management**	Denver, Colo.	116	2,750.62	66.81%	39.48%
19	CIBC Private Wealth Advisors	Atlanta, Ga.	8,916	73,775.46	60.77%	49.12%
20	BerganKDV Wealth Management	Bloomington, Minn.	970	2,142.63	59.55%	39.81%
21	Mariner Wealth Advisors	Overland Park, Kan.	30,099	55,432.64	58.55%	20.50%
22	The Mather Group	Chicago, Ill.	3,126	8,579.76	58.17%	9.34%
23	Abound Wealth Management	Franklin, Tenn.	432	791.40	57.84%	26.78%
24	Clearstead Advisors	Cleveland, Ohio	1,095	11,225.68	56.72%	17.65%
25	IPI Wealth Management	Decatur, Ill.	8,258	1,883.81	55.71%	24.05%
26	MAI Capital Management	Cleveland, Ohio	4,719	14,386.11	55.55%	-14.47%
27	AE Wealth Management	Topeka, Kan.	67,496	19,640.09	55.42%	58.92%
28	Kingsview Partners	Grants Pass, Ore.	4,761	3,479.62	54.26%	15.57%
29	Virtue Capital Management	Brentwood, Tenn.	6,634	1,071.52	53.00%	84.21%
30	Miracle Mile Advisors	Los Angeles, Calif.	1,000	3,067.35	52.39%	-43.62%
31	Inspire Investing	Meridian, Idaho	2,186	1,984.84	51.02%	9.57%
32	Constellation Wealth Advisors	Cincinnati, Ohio	257	3,018.11	50.48%	66.87%
33	Elser Financial Planning	Indianapolis, Ind.	296	1,579.10	48.58%	25.49%
34	Bogart Wealth	McLean, Va.	1,032	1,925.11	46.76%	22.44%
35	Savant Wealth Management	Rockford, Ill.	7,819	13,130.28	46.63%	20.94%
36	CAPTRUST	Raleigh, N.C.	22,341	655,054.29	45.30%	-6.80%
37	Relative Value Partners	Northbrook, Ill.	320	2,309.02	45.20%	18.88%
38	Gratus Capital	Atlanta, Ga.	881	3,499.40	45.16%	17.81%
39	Spectrum Investment Advisors	Mequon, Wis.	336	667.52	44.73%	34.39%
40	Red Door Wealth Management	Memphis, Tenn.	591	1,187.95	44.11%	3.39%
41	The High Net Worth Advisory Group	Naples, Fla.	325	581.00	44.04%	-0.28%
42	Parallel Advisors	San Francisco, Calif.	2,732	5,443.16	42.81%	25.92%
43	The Colony Group	Boston, Mass.	5,654	18,638.72	42.78%	16.57%
44	Investmark Advisory Group	Shelton, Conn.	583	653.48	42.29%	35.21%
45	Quadrant Private Wealth	Bethlehem, Pa.	665	1,410.01	42.15%	36.81%
46	Beacon Capital Management	Dayton, Ohio	10,138	4,744.09	41.92%	33.69%
47	Apella Capital	Glastonbury, Conn.	2,432	2,357.00	41.82%	16.86%
48	Wescott Financial Advisory Group	Philadelphia, Pa.	757	3,452.85	41.48%	-3.56%
49	Aveo Capital Partners	Englewood, Colo.	1,102	1,453.32	41.41%	63.48%
50	MJP Wealth Advisors	Farmington, Conn.	697	967.28	40.56%	30.48%

**AUM is for JFG Wealth Management and Johnson Financial Group. JFG Wealth Management is owned 100% by Johnson Financial Group and Johnson Financial Group employees.