



CPA **wealth**
PROVIDER

Wealth Magnets

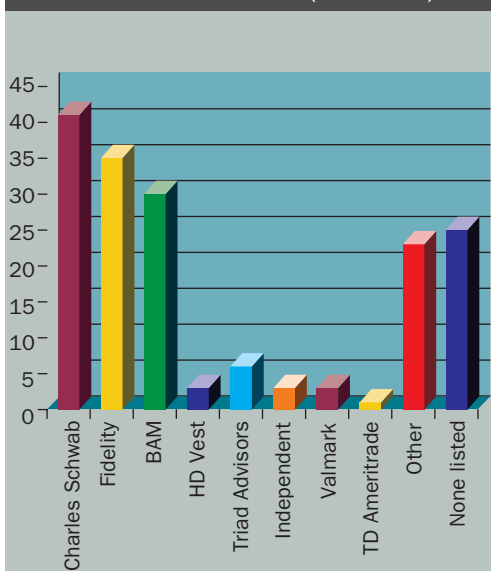
The 4th Annual
Ranking of CPAs
by AUM

TOP FIRMS BY AUM

| THE \$100+ MILLION CLUB | | | | | |
|-------------------------|---|--------------------------|---------|-------|-------------------------|
| AUM \$ | FIRM NAME | LOCATION | OFFICES | STAFF | MANAGING PARTNER |
| 748,859,750 | Truepoint | Cincinnati | 1 | 19 | Michael Chasnoff |
| 730,000,000 | Capital Performance Advisors | Walnut Creek, Calif. | | | Sherman Doll |
| 600,000,000 | CCR Wealth Management | Westborough, Mass. | 2 | 9 | David Borden |
| 580,000,000 | Schneider Downs Wealth Management Advisors | Pittsburgh | 2 | 11 | Don Linzer |
| 552,000,000 | Jackson Thornton Asset Management | Montgomery, Ala. | 5 | 12 | George Smith |
| 550,000,000 | Vista Wealth Management | San Francisco | 6 | 15 | Henry Pilger |
| 472,000,000 | Dopkins Wealth Management | Williamsville, N.Y. | | | Brian Cannon |
| 466,313,032 | Sequoia Financial Group | Cleveland | 3 | 22 | Thomas Haught |
| 452,100,038 | Mission Wealth Management | Santa Barbara, Calif. | 2 | 15 | Brad Stark |
| 446,000,000 | GHP Investment Advisors | Denver | 1 | 6 | Steven Levey |
| 410,000,000 | HA&W/Tegra Financial Partners | Atlanta | 2 | 30 | Nick Bhandari |
| 403,000,000 | Warren, Averett, Kimbrough & Marino Wealth Management | Birmingham, Ala. | 1 | 9 | James Warren |
| 400,000,000 | Anchin Wealth Management | New York City | 1 | 5 | Frank Schettino |
| 387,261,000 | Weaver Wealth Management | Dallas | 5 | 8 | David Sego |
| 385,000,000 | Dynasty Quest | Sedona, Ariz. | 2 | 2 | Steven Siegel |
| 323,000,000 | Corrigan Financial | Middletown, R.I. | 1 | 18 | Daniel Corrigan |
| 323,000,000 | LBMC Investment Advisors | Brentwood, Tenn. | 3 | 4 | Greg Herman |
| 313,526,444 | Beaird Harris Wealth Management | Dallas | 1 | 8 | Pat Beaird |
| 302,426,893 | Lassus Wherley | New Providence, N.J. | 2 | 25 | Clare Wherley |
| 300,000,000 | Caturano Wealth Management | Boston | 1 | 5 | Richard Caturano |
| 300,000,000 | Jackson Wealth Management | Heathrow, Fla. | 1 | 8 | George Jackson |
| 290,000,000 | ML&R Wealth Management | Austin, Texas | | | Steve Harvey |
| 287,700,000 | Orizon | Omaha, Neb. | 1 | 43 | Gene Garrelts |
| 267,000,000 | Wealthquest Financial Services | Norfolk, Va. | | | Jeff Chernitzer |
| 230,000,000 | Traphagen Investment Advisors | Oradell, N.J. | 1 | 3 | Peter Traphagen |
| 223,200,000 | Kemper Capital Management | Robinson, Ill. | 5 | 15 | Thomas Moore |
| 213,592,927 | CRA Financial | Northfield, N.J. | 1 | 5 | M. Reynolds/T. Reynolds |
| 207,000,000 | Boulay Financial Advisors | Minneapolis | 1 | 9 | Dave Bremer |
| 201,000,000 | Herbein Wealth Management | Wyomissing, Pa. | | | William Morgan |
| 201,000,000 | SMF Financial Advisors | Clifton, N.J. | | | Michael Shenker |
| 200,000,000 | SS&G Wealth Management | Akron, Ohio | 1 | 9 | Carina Diamond |
| 196,000,000 | KEB Asset Management | Springfield, Ill. | | | Marc Carter |
| 189,000,000 | Zdenek Financial Planning | Flemington, N.J. | 2 | 16 | Albert Zdenek |
| 188,191,000 | Jack Oujo CPA | Wall, N.J. | 1 | 7 | Jack Oujo |
| 188,000,000 | WebsterRogers Investment Advisors | Florence, S.C. | | | Frank Rogers |
| 180,148,000 | Glass Jacobson Investment Advisors | Owings Mills, Md. | 1 | 8 | Jonathan Dinkins |
| 180,000,000 | Lauterbach Financial Advisors | El Paso, Texas | | | Jon Sonnen |
| 177,000,000 | A & F Financial Advisors | Charleston, W.Va. | | | Gary Swingle |
| 175,344,571 | Asset Strategies | Casper, Wyo. | 4 | 7 | Connie Brezik |
| 175,000,000 | Grant/GrossMendelsohn | Baltimore | 1 | 5 | Chris Grant |
| 175,000,000 | Weiser Capital Management | New York City | 4 | 8 | Doug Phillips |
| 168,000,000 | Pacific Investment Advisors | Portland, Ore. | 1 | 6 | Kathleen Kee |
| 163,000,000 | SC&H Group | Sparks, Md. | 3 | 270 | Ronald Causey |
| 160,257,434 | Tarpley & Underwood Financial Advisors | Atlanta | 1 | 4 | Roger Ward |
| 150,000,000 | CPFA | Greenwood Village, Colo. | 1 | 7 | Richard Rogers |
| 150,000,000 | KLR Wealth Management | Providence, R.I. | 1 | 3 | Peri Ann Aptaker |
| 150,000,000 | Mark Sheptoff Financial Planning | Glastonbury, Ct. | 1 | 2 | Mark Sheptoff |
| 142,000,000 | Nova Investment Group | Atlanta | | | Jeffrey Cohen |
| 141,798,445 | Arvai & Associates/Mutual Fund Management | Troy, Mich. | 1 | 4 | Frank Arvai |
| 139,000,000 | Mason Road Wealth Advisors | St. Louis | | | William Bender |
| 134,394,091 | KMH Wealth Management | Victoria, Texas | 1 | 4 | Lane Keller |
| 131,000,000 | Andrews Lucia Wealth Management | San Mateo, Calif. | | | Robert Lucia |
| 130,000,000 | KR Financial Services | Hollywood, Fla. | 1 | 4.5 | Jeffrey B. Koch |
| 122,000,000 | Witt Mares Financial Vision | Williamsburg, Va. | | | David Bush |
| 119,000,000 | FMF & E Wealth Management | Syracuse, N.Y. | | | Chris Gardner |
| 118,000,000 | LCV Wealth Management | Rockford, Ill. | | | Scot Roche |
| 117,000,000 | Wealth Management Group | Dover, Del. | | | Scott Brown |
| 115,000,000 | Blue Ocean Strategic Capital | Syracuse, N.Y. | 1 | 6 | Theodore Sarenski |
| 113,000,000 | AMD Financial Services | St. Louis | | | Stan Royer |
| 110,000,000 | FMRTD Financial Resources | Cranford, N.J. | 1 | 7 | Joseph Fazio |
| 105,000,000 | Kraft Asset Management | Nashville, Tenn. | | | Stephen High |

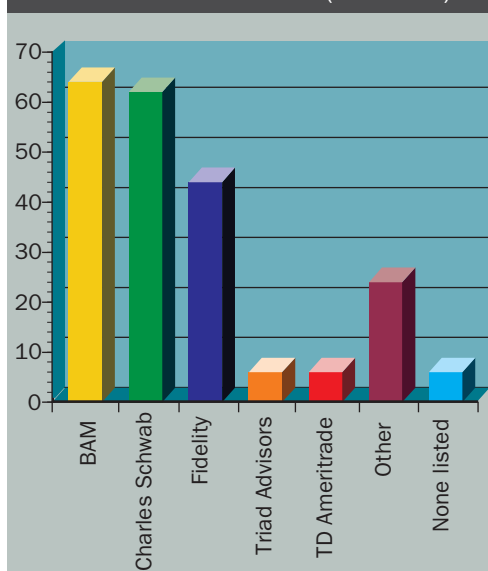
| THE \$50+ MILLION CLUB | | | | | | |
|------------------------|--------------------------------------|-------------------------|---------|-------|---------------------|--|
| AUM \$ | FIRM NAME | LOCATION | OFFICES | STAFF | MANAGING PARTNER | |
| 99,000,000 | RF&L Wealth Management | Boston | | | F. Neil Doherty | |
| 98,000,000 | HD Financial Services | Omaha, Neb. | | | Richard Homan | |
| 97,000,000 | AVL/Wealthcare | Gulfport, Miss. | | | Rodney Van Loon | |
| 96,000,000 | Kolb+Co. Financial Advisers | Brookfield, Wis. | 1 | 6 | Mark Miller | |
| 94,000,000 | Shinn Financial Group | Fort Collins, Colo. | 1 | 3 | Ralph Shinn | |
| 91,000,000 | PKS Investment Advisors | Ocean City, Md. | | | Winn Booth | |
| 89,000,000 | Great River Asset Management | Burlington, Iowa | | | Jim Walker | |
| 88,000,000 | BGEMD Capital Advisors | Richardson, Texas | | | John Garvey | |
| 86,000,000 | Financial Resource Group | Gaithersburg, Md. | | | Joseph Kilner | |
| 85,500,000 | ShankerValleau Wealth Advisors | Evanston, Ill. | 1 | 6 | Lawrence Shanker | |
| 84,750,000 | Sweeney Kovar | Danville, Calif. | 1 | 15 | K. Sweeney/J. Kovar | |
| 83,000,000 | JDH Wealth Management | Santa Rosa, Calif. | | | Tim Delaney | |
| 82,725,000 | Adam Smith Family Advisors | Minnetonka, Minn. | 1 | 7 | Kevin O'Connor | |
| 80,634,000 | Ronald P. Austin CPA/PFS | Lafayette, Ind. | 1 | 1 | Ronald Austin | |
| 77,282,546 | Hollis Huff Lewis Financial Services | Houston | 2 | 8 | Keith Huff | |
| 75,000,000 | Briggs Wealth Management | Glastonbury, Ct. | 1 | 3 | Mark Briggs | |
| 74,000,000 | Solutions for Wealth Management | Bourbonnais, Ill. | | | Mark Smith | |
| 73,000,000 | KB Investment Advisors | St. Louis | | | Nathan Rages | |
| 72,000,000 | ARK Financial Services | Bethesda, Md. | | | Andrew Kline | |
| 68,000,000 | Wasserman Wealth Management | Farmington Hills, Mich. | | | Bradley Wasserman | |
| 64,200,000 | Gunn & Co. Investment Management | Jacksonville, Fla. | 1 | 3 | Marshall Gunn | |
| 63,000,000 | WIN Advisor Group | Denver | | | Mark Autterson | |
| 60,000,000 | SFC Asset Management | State College, Pa. | | | James Karchner | |
| 59,000,000 | Shoreline Asset Management | New Castle, Ind. | | | Marion Shore | |
| 58,000,000 | Capital Asset Management | Jeffersonville, Ind. | | | Gregory Rogers | |
| 58,000,000 | Green Wealth Management | Salem, Ore. | | | Phil Green | |
| 58,000,000 | The Whitlock Co. | Springfield, Mo. | 2 | 32 | David Myers | |
| 55,000,000 | D3 Financial Counselors | Downers Grove, Ill. | 2 | 5 | Donald Duncan | |
| 54,000,000 | PBGH Financial Advisors | Fredricksburg, Va. | | | Daniel Bender | |
| 53,000,000 | Capstone Wealth Management | Tuscaloosa, Ala. | | | William Jessup | |
| 53,000,000 | Heartland Investment Advisors | Kansas City, Mo. | | | Douglas Hunt | |
| 51,000,000 | Squire Wealth Advisors | Orem, Utah | | | Tim Christensen | |
| 50,000,000 | Bishop Financial Advisors | Hudson, Ohio | 1 | 3 | Brian Bishop | |
| 50,000,000 | Peak Investment Solutions | Roseville, Calif. | | | Ken Pope | |

The \$100+ Million Dollar Club
Broker-dealer affiliations (% of firms)



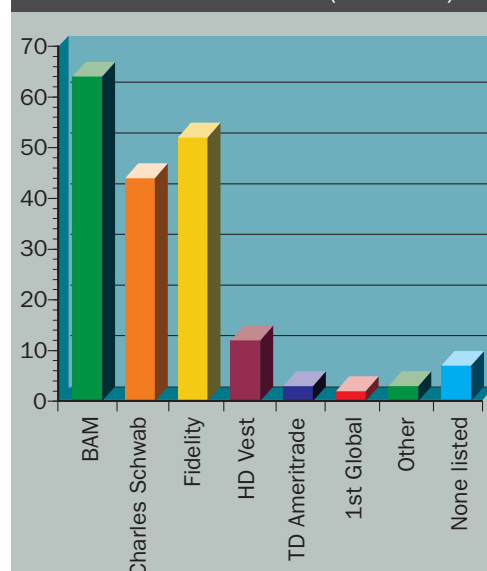
Note: Some firms reported more than one affiliation

The \$50+ Million Club
Broker-dealer affiliations (% of firms)



Note: Some firms reported more than one affiliation

The Rising Stars
Broker-dealer affiliations (% of firms)



Note: Some firms reported more than one affiliation

TOP FIRMS BY AUM

| THE RISING STARS | | | | | |
|------------------|--------------------------------------|--------------------------|---------|-------|-----------------------|
| AUM \$ | FIRM NAME | LOCATION | OFFICES | STAFF | MANAGING PARTNER |
| 48,713,000 | Coventry Financial Group | Quitman, Texas | 1 | 4 | Larry Coventry |
| 47,631,000 | Dexter Ward & Associates | Denison, Texas | 2 | 3 | Dexter Ward |
| 44,000,000 | Klane Wealth Management | St. Paul, Minn. | 1 | 1 | Steven Klane |
| 44,000,000 | Salem Asset Management | Salem, Ore. | | | Joanne Humphrey |
| 41,000,000 | Cynthia L. Conger CPA | Little Rock, Ark. | 1 | 2 | Cynthia Conger |
| 41,000,000 | Focus Asset Management | Virginia Beach, Va. | | | Lawton Baker |
| 40,000,000 | Cornerstone Wealth Advisors | Overland Park, Kan. | | | David Imhoff |
| 40,000,000 | Scafa Financial Services | Princeton Junction, N.J. | 2 | 2 | Elizabeth Scafa |
| 39,000,000 | Horne Wealth Advisors | Ridgeland, Miss. | | | Stan Purvis |
| 38,679,727 | TDC Capital Advisors | Bryan, Texas | 1 | 3 | Ronnie Craig |
| 38,000,000 | Bullock Capital Alliance | Colorado Springs, Colo. | 1 | 1 | David Bullock |
| 38,000,000 | Onyx Financial Advisors | Idaho Falls, Idaho | 1 | 4 | Partner group |
| 37,000,000 | Krouse Kern Wealth Management | Ft. Wayne, Ind. | | | Anthony Stureman |
| 37,000,000 | Strategic Investment Advisors | Cape Girardeau, Mo. | | | James Hillin |
| 35,500,000 | M.J. Baker & Associates | Avon Lake, Ohio | 1 | 9 | Michael Baker |
| 35,000,000 | Dental Wealth Advisors | Kirkland, Wash. | | | Sam Martin |
| 35,000,000 | GAF Financial Group | New York City | 1 | 6 | Bill Huie |
| 31,000,000 | CLM Capital Management | Sanford, Maine | | | Bruce McNamee |
| 31,000,000 | Financial Advocates | Costa Mesa, Calif. | | | James Pickett |
| 31,000,000 | LGC&D Wealth Management | Providence, R.I. | | | Jerrold Dorfman |
| 31,000,000 | Poinciana Advisors Group | Palm Beach, Fla. | | | Karyl Neal |
| 31,000,000 | William MacDonald CPA/CFP | Portsmouth, N.H. | 2 | 2 | William MacDonald |
| 30,000,000 | Portland Financial Advisors | Beaverton, Ore. | 1 | 3 | Russell Francis |
| 29,000,000 | Siena Capital Management | Grand Ledge, Mich. | | | S. Hicks/R. Millbrook |
| 28,000,000 | HBE Investment Advisors | Lincoln, Neb. | | | John Hanigan |
| 27,000,000 | Capital Wealthcare | Wichita, Kan. | | | Kedre Mellor |
| 27,000,000 | Focused Financial Management | Baton Rouge, La. | | | Brent Salter |
| 25,000,000 | Carey & Hanna | Ventura, Calif. | 1 | 6 | Davin Carey |
| 25,000,000 | Michelle Miller CPA/CFP | Austin, Texas | | | Michelle Miller |
| 25,000,000 | Naarden Financial Group | Pocatello, Idaho | | | Alan Van Orden |
| 25,000,000 | RNM Financial Management | Soldotna, Alaska | | | Bob Mikunda |
| 25,000,000 | Walpole Financial Advisors | Goleta, Calif. | | | Jean-Luc Bourdon |
| 24,500,000 | Allied Financial Partners | Victor, N.Y. | 3 | 10 | T. Tette/K. Ingersoll |
| 24,477,725 | Kuhl Financial Services | Lake Bluff, Ill. | 1 | 1 | Larry Kuhl |
| 24,000,000 | Maze Financial Planning | Chapel Hill, N.C. | | | Bill Bunch |
| 23,000,000 | Meridian Wealth Advisors | Albuquerque, N.M. | | | Scott Floersheim |
| 22,500,000 | Hutchins & Haake | Overland Park, Kansas | 1 | 14 | Dan Hutchins |
| 21,978,663 | Financial Life Advisors | San Antonio | 1 | 3 | Jim Oliver |
| 20,000,000 | Willeford CPA Wealth Advisors | Roswell, Ga. | | | Rick Willeford |
| 19,000,000 | Lake Travis Financial Advisors | Austin, Texas | | | John Brodnax |
| 17,000,000 | Credo Investment Advisors | Bozeman, Mont. | | | Tom Shea |
| 17,000,000 | FR Financial Advisors | Coral Springs, Fla. | | | Allen Forrest |
| 17,000,000 | Millares Asset Management | Coral Gables, Fla. | | | Ruben Millares |
| 16,000,000 | Forest Asset Management | Berwyn, Ill. | | | JoAnne May |
| 16,000,000 | Pritchard Osborne Financial Services | St. Louis | | | Steve Dumstorff |
| 16,000,000 | RJ Pohl Advisor Services | Evansville, Ind. | | | Ron Pohl |
| 15,000,000 | Colleen Weber CPA | Chanhassen, Minn. | 1 | 2 | Colleen Weber |
| 15,000,000 | GLC Advisory Services | Maitland, Fla. | | | Paula Taylor |
| 15,000,000 | Mayfield Advisors | Palo Alto, Calif. | | | Bert Torres |
| 14,500,000 | Fitzgerald Financial Partners | Houston | 1 | 1 | Michael Fitzgerald |
| 13,000,000 | D & T Financial Advisors | Concord, Calif. | | | Gary Downs |
| 13,000,000 | Innovative Financial | Lakewood, Colo. | 1 | 2 | DeDe Jones |
| 12,000,000 | Madison Wealth Advisors | Kansas City, Mo. | | | Doug Clark |

The rankings are based upon the assets under management or administration information received via survey by CPA Wealth Provider of 181 CPA firms that have a financial planning practice. To be included, a financial professional in the office must hold a CPA credential. Some of the figures listed are based on calendar-year, fiscal-year or current figures as reported by the firms. CPA Wealth Provider is an independent, unaffiliated third party. The rankings are not indicative of an advisor's performance and are not representative of any client's experience. The numbers contained herein are deemed reliable but accuracy cannot be guaranteed.