

FINANCIAL ADVISOR

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### **Facing Down the Talent Crisis**

Our biggest human capital challenge  
May still be ahead of us.

### **The Real Impact of ESG**

As critics start to hover over the  
ESG space, we ask what  
the real pros and cons are.



# FA's RIA Survey & Ranking 2022

### **How to us LinkedIn**

Susan Theder answers 10  
Advisor questions about  
how to use the popular site.

# FA's 2022 RIA RANKING

2021 TOTAL ASSETS RANK	FIRM NAME	LOCATION	YEAR END 2021 ASSETS (\$MM)*	% GROWTH IN ASSETS 2020-2021	ASSETS PER CLIENT (\$MM)**	% GROWTH IN ASSETS PER CLIENT	% CHANGE IN NO. OF CLIENTS
<b>ASSET CATEGORY: \$1 BILLION AND OVER</b>							
305	<b>StraightLine Group</b>	Troy, Mich.	1,179.19	11.58%	0.45	-14.20%	30.04%
306	<b>Intelligence Driven Advisers</b>	Carlsbad, Calif.	1,169.50	10.29%	1.00	-5.75%	17.02%
307	<b>Traphagen Investment Advisors</b>	Oradell, N.J.	1,161.12	25.90%	0.76	16.79%	7.79%
308	<b>Wealthstream Advisors</b>	New York, N.Y.	1,157.00	19.43%	3.01	11.96%	6.67%
309	<b>Financial Synergies Wealth Advisors</b>	Houston, Texas	1,155.37	19.00%	1.71	8.77%	9.40%
310	<b>BigSur Partners</b>	Miami, Fla.	1,153.34	13.71%	60.70	19.70%	-5.00%
311	<b>SPC Financial</b>	Rockville, Md.	1,145.12	19.89%	0.94	9.58%	9.41%
312	<b>Cahaba Wealth Management</b>	Atlanta, Ga.	1,142.78	20.30%	1.65	1.20%	18.87%
313	<b>Retirement Investment Advisors</b>	Oklahoma City, Okla.	1,131.46	17.87%	0.91	27.92%	-7.86%
314	<b>PDS Planning</b>	Dublin, Ohio	1,131.18	20.12%	1.90	18.70%	1.19%
315	<b>The Advisory Group San Francisco</b>	San Francisco, Calif.	1,114.73	5.00%	7.01	5.66%	-0.63%
316	<b>BFSG</b>	Irvine, Calif.	1,104.64	16.17%	1.48	9.93%	5.67%
317	<b>Blue Chip Partners</b>	Farmington Hills, Mich.	1,098.78	27.46%	1.64	0.11%	27.32%
318	<b>Corrigan Financial</b>	Middletown, R.I.	1,086.61	15.11%	1.04	10.04%	4.60%
319	<b>Delta Financial Group</b>	Basking Ridge, N.J.	1,076.24	18.07%	1.76	36.43%	-13.46%
320	<b>Mayflower Advisors</b>	Boston, Mass.	1,074.74	19.20%	1.35	-10.15%	32.67%
321	<b>Virtue Capital Management</b>	Brentwood, Tenn.	1,071.52	53.00%	0.16	84.21%	-16.94%
322	<b>Agiii</b>	Richmond, Va.	1,066.54	20.57%	3.31	17.57%	2.55%
323	<b>Christopher Weil &amp; Company</b>	San Diego, Calif.	1,062.28	19.02%	2.05	25.47%	-5.14%
324	<b>Titleist Asset Management</b>	San Antonio, Texas	1,059.17	27.43%	0.84	3.87%	22.68%
325	<b>NEIRG Wealth Management</b>	North Andover, Mass.	1,027.57	34.15%	1.22	21.53%	10.38%
326	<b>Beacon Financial Group</b>	Dallas, Texas	1,020.14	17.81%	1.23	12.68%	4.55%
327	<b>Pinkerton Retirement Specialists</b>	Coeur D'Alene, Idaho	1,020.00	14.29%	1.30	9.77%	4.11%
328	<b>Petersen Hastings Investment Management</b>	Kennewick, Wash.	1,011.69	20.73%	1.16	6.48%	13.38%
329	<b>Nilsine Partners</b>	Greenwood Village, Colo.	1,009.27	N/A†	2.82	N/A†	N/A†
330	<b>Apriem Advisors</b>	Irvine, Calif.	1,007.89	15.07%	1.41	7.51%	7.03%
331	<b>Financial Planning &amp; Information Services</b>	De Pere, Wis.	1,007.52	15.23%	0.92	8.14%	6.55%
<b>ASSET CATEGORY: \$500 MILLION TO &lt; \$1 BILLION</b>							
332	<b>Janiczek Wealth Management</b>	Denver, Colo.	985.25	26.29%	6.16	6.56%	18.52%
333	<b>Spectrum Wealth Management</b>	Indianapolis, Ind.	977.12	37.37%	4.23	32.02%	4.05%
334	<b>MJP Wealth Advisors</b>	Farmington, Conn.	967.28	40.56%	1.39	30.48%	7.73%
335	<b>Kowal Investment Group</b>	Waukesha, Wis.	960.97	1.16%	0.80	-7.27%	9.09%
336	<b>REDW Wealth</b>	Albuquerque, N.M.	955.10	16.07%	2.49	6.40%	9.09%
337	<b>Seasons of Advice Wealth Management</b>	New York, N.Y.	944.11	17.07%	1.26	10.53%	5.92%
338	<b>Hemington Wealth Management</b>	Falls Church, Va.	934.28	23.60%	4.56	6.11%	16.48%
339	<b>Total Wealth Planning</b>	Cincinnati, Ohio	932.51	27.19%	1.82	11.79%	13.78%
340	<b>Destiny Wealth Partners</b>	Tavares, Fla.	931.15	37.14%	1.04	22.00%	12.41%
341	<b>DiNuzzo Private Wealth</b>	Beaver, Pa.	929.49	16.92%	1.13	7.01%	9.26%
342	<b>Vintage Financial Services</b>	Ann Arbor, Mich.	923.41	18.50%	1.74	16.27%	1.92%
343	<b>Moisand Fitzgerald Tamayo</b>	Orlando, Fla.	921.97	24.13%	1.26	4.21%	19.12%
344	<b>Willis Johnson &amp; Associates</b>	Houston, Texas	914.87	26.72%	2.46	13.44%	11.71%
345	<b>WPWealth</b>	Fort Worth, Texas	914.56	25.97%	2.09	16.75%	7.90%

\*Discretionary and nondiscretionary AUM can be found in FA's online version and Form ADV. \*\*Average assets per client relationship. †Firm started in 2021. ††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. ‡ AUM is for NorthCoast Asset Management, a dba of, and investment advisory services offered through, Connecticut Wealth. ††Pan Global Advisers is a wholly owned RIA by Tax Efficient Asset Management Solution ("TEAMS"), and is the sub-advisor to TEAMS. †††C2P Capital Advisor Group dba Prosperity Capital Advisors.



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