

## TOP FIRMS BY ASSETS UNDER MANAGEMENT

### SEARCHING FOR BETTER RETURNS

Leading CPA financial planners are focused on finding new tools to serve their clients' needs — and new staff, as well

#### THE \$100 MILLION-PLUS CLUB

AUM \$	FIRM NAME	LOCATION	STAFF	MANAGING PARTNER
9,725,451,439	Plante Moran Financial Advisors	Southfield, Mich.	126	John Lesser
6,459,404,930	myCIO Wealth Partners	Philadelphia	35	David Lees
<b>5,000,000,000</b>	<b>McGladrey Wealth Management</b>	<b>Minneapolis</b>	<b>82</b>	<b>Randy Matz</b>
3,730,692,863	CliftonLarsonAllen Wealth Advisors	Minneapolis	89	Tony Hallada
3,632,469,656	Savant Capital Management	Rockford, Ill.	93	Brent Brodeski
3,300,000,000	Wipfli	Milwaukee	51	Rick Dreher
3,108,261,214	Gilman Ciocia Inc.	Poughkeepsie, N.Y.	181	Michael Ryan
2,520,153,535	Joel Isaacson & Co.	New York City	38	Joel Isaacson
2,377,754,744	Rehmann Financial †	Lansing, Mich.	46	Fred Schaad
2,356,028,133	BKD Wealth Advisors	Springfield, Mo.	55	Jack Thurman
2,247,890,210	SignatureFD	Atlanta	46	Jeff Peller
1,836,973,960	Warren Averett Asset Management †	Birmingham, Ala.	30	Josh Reidinger
1,734,000,000	Honkamp Krueger Financial Services Inc.	Dubuque, Iowa	59	John Darrah
1,686,358,494	HBKS Wealth Advisors	Erie, Pa.	48	Christopher Allegretti
1,615,617,000	Forum Financial Management	Lombard, Ill.	45	N. Mindel / A. Hamburger
1,615,000,000	Truepoint Wealth Counsel	Cincinnati	34	Michael Chasnoff
1,600,000,000	Berkowitz Pollack Brant/Provenance Wealth	Miami	24	Richard Berkowitz
1,599,582,261	Moss Adams Wealth Advisors	Seattle	39	Rebecca Pomeroy
1,249,930,651	Dixon Hughes Wealth Advisors †	Asheville, N.C.	17	NA
1,195,491,422	SVA Plumb Wealth Management †	Madison, Wis.	37	Thomas Plumb
1,100,000,000	RubinBrown Advisors	St. Louis	481	John Herber
1,100,000,000	Citrin Cooperman Wealth Management	New York City	7	David Bruckman
1,006,637,423	Thomas Wirig Doll	Walnut Creek, Calif.		Steve Leininger



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