

# Investment News<sup>TM</sup>

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## RIA Rundown 2013

### Largest RIA's Ranked by total AUM

Rank	Business Name	Avg. account AUM	Discretionary AUM	Non-discretionary AUM	Total AUM
25	Athena Capital Advisors	\$12,102,330	\$2,424,375,216	\$2,670,705,704	\$5,095,080,920
26	Reinhart Partners, Inc.	\$983,368	\$4,834,026,641	\$244,083,646	\$5,078,110,287
27	Ballentine Partners	\$1,589,428	\$2,268,298,424	\$2,509,522,609	\$4,777,821,033
28	Fiduciary Counselling Inc	\$3,689,365	\$2,208,957,087	\$2,424,885,264	\$4,633,842,351
29	Tiedemann Wealth Management	\$3,791,036	\$4,009,629,315	\$577,523,703	\$4,587,153,018
30	Banyan Partners	\$849,592	\$3,712,000,000	\$869,000,000	\$4,581,000,000
31	Gresham Partners	\$2,339,588	\$2,396,814,053	\$2,174,741,204	\$4,571,555,257
32	East End Advisors	\$186,421,433	\$596,945,985	\$3,877,168,402	\$4,474,114,387
33	Finaccess Advisors	\$17,476,814	\$0	\$4,072,097,743	\$4,072,097,743
<b>34</b>	<b>RMB Capital Management</b>	<b>\$383,870</b>	<b>\$2,959,295,301</b>	<b>\$1,018,367,641</b>	<b>\$3,977,662,942</b>
35	Halbert Hargrove	\$1,277,608	\$2,112,700,643	\$1,861,939,364	\$3,974,640,007
36	Welch & Forbes	\$1,625,616	\$3,593,810,855	\$354,809,530	\$3,948,620,385
37	Chilton Investment Services	\$4,246,718	\$3,913,822,366	\$5,898,520	\$3,919,720,886
38	Savant Capital Management	\$1,180,825	\$3,835,629,741	\$31,571,759	\$3,867,201,500
39	Symmetry Partners	\$173,740	\$3,840,000,000	\$0	\$3,840,000,000
40	Ferguson Wellman Capital Management, Inc.	\$1,808,656	\$3,834,350,668	\$0	\$3,834,350,668

# Largest RIA's by State: Illinois

*Ranked by Assets under Management*

Rank	Business Name	Avg. account AUM	Discretionary AUM	Non-discretionary AUM	Total AUM
1	Capital Strategies Investment Group	\$48,702,202	\$700,135,983	\$6,800,003,096	\$7,500,139,079
2	Gresham Partners	\$2,339,588	\$2,396,814,053	\$2,174,741,204	\$4,571,555,257
<b>3</b>	<b>RMB Capital Management</b>	<b>\$383,870</b>	<b>\$2,959,295,301</b>	<b>\$1,018,367,641</b>	<b>\$3,977,662,942</b>
4	Savant Capital Management	\$1,180,825	\$3,835,629,741	\$31,571,759	\$3,867,201,500
5	Alfair Advisers	\$7,801,333	\$670,160,959	\$3,058,876,342	\$3,729,037,301
6	Gofen and Glossberg	\$1,232,469	\$3,298,654,232	\$213,881,903	\$3,512,536,135
7	Balasa Dinverno Foltz	\$687,831	\$2,631,488,645	\$137,717,133	\$2,769,205,778
8	JMG Financial Group Ltd	\$826,149	\$1,630,751,000	\$72,768,000	\$1,703,519,000
9	Chesley, Taft & Associates	\$1,042,429	\$1,236,241,816	\$137,679,132	\$1,373,920,948
10	Strategic Wealth Partners, LLC	\$436,244	\$1,044,723,216	\$214,277,408	\$1,259,000,624
11	Whitnell & Co	\$824,627	\$968,263,000	\$177,968,000	\$1,146,231,000
12	Capstone Financial Advisors Inc	\$586,126	\$1,110,855,711	\$10,990,264	\$1,121,845,975
13	InterOcean Capital	\$920,511	\$449,408,059	\$436,123,422	\$885,531,481
14	Chicago Partners Investment Group	\$1,216,017	\$416,395,000	\$460,353,000	\$876,748,000
15	Huber Financial	\$207,762	\$784,923,684	\$0	\$784,923,684