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# TOP 50 FASTEST-GROWING FIRMS<sup>\*</sup> With More Than \$500 Million In AUM

GROWTH RANK	FIRM NAME	LOCATION	2020 CLIENTS	YEAR END 2020 ASSETS (\$MM) <sup>+</sup>	% GROWTH IN ASSETS 2019-2020	% GROWTH IN ASSETS PER CLIENT
1	Brookstone Capital Management	Wheaton, Ill.	34,000	7,015.84	137.83%	22.41%
2	AlphaCore Capital	La Jolla, Calif.	764	998.27	136.01%	46.43%
3	Inspire Investing	Hollister, Calif.	472	1,314.26	107.10%	105.35%
4	Cresset	Chicago, Ill.	950	11,677.08	93.13%	-8.11%
5	Apella Capital	Glastonbury, Conn.	2,004	1,662.00	91.25%	72.84%
6	Pathstone	Boston, Mass.	1,000	19,577.07	90.97%	-42.90%
7	R W Investment Management	Boise, Idaho	818	1,246.72	87.80%	9.28%
8	Modera Wealth Management	Westwood, N.J.	1,909	4,957.47	80.52%	32.67%
9	Diversified Lifelong Advisors	Wilmington, Del.	993	914.78	80.10%	24.60%
10	Wealth Enhancement Group	Plymouth, Minn.	23,594	24,264.06	75.55%	25.51%
11	Foundations Investment Advisors	Phoenix, Ariz.	8,096	1,744.12	69.67%	8.24%
12	CIBC Private Wealth, US	Atlanta, Ga.	8,270	45,888.99	69.51%	61.72%
13	Cary Street Partners Investment Advisory	Richmond, Va.	3,093	3,254.68	67.69%	N/A
14	Signature Estate & Investment Advisors	Los Angeles, Calif.	9,391	13,632.02	65.52%	46.38%
15	Axxcess Wealth Management	Carlsbad, Calif.	6,382	2,096.68	62.95%	-47.91%
16	Lake Street Advisors	Portsmouth, N.H.	55	2,910.53	57.26%	48.68%
17	Aveo Capital Partners	Greenwood Village, Colo.	1,102	1,027.75	55.72%	40.74%
18	EP Wealth Advisors	Torrance, Calif.	8,300	10,751.30	55.14%	2.80%
19	Titleist Asset Management	San Antonio, Texas	1,023	831.19	54.79%	31.64%
20	Peavine Capital	Reno, Nev.	23	538.00	53.71%	153.96%
21	Bordeaux Wealth Advisors	Menlo Park, Calif.	159	3,470.10	52.47%	21.78%
22	Resource Management	Metairie, La.	550	1,750.00	51.80%	44.90%
23	Abound Wealth Management	Franklin, Tenn.	347	501.39	50.09%	15.48%
24	Greenwich Wealth Management	Greenwich, Conn.	178	2,197.15	49.95%	37.32%
25	Fiducient Advisors	Chicago, Ill.	592	28,304.26	48.04%	11.28%
26	AE Wealth Management	Topeka, Kan.	52,453	12,637.10	47.22%	19.22%
27	Mirador Capital Partners	Pleasanton, Calif.	500	536.00	46.45%	34.73%
28	Capital Wealth Planning	Naples, Fla.	4,889	2,610.57	46.41%	7.27%
29	True North Advisors	Dallas, Texas	584	2,338.10	46.01%	38.51%
30	Annex Wealth Management	Elm Grove, Wis.	5,306	3,785.32	46.00%	26.99%
31	Cabana Asset Management	Fayetteville, Ark.	7,272	1,481.53	45.76%	4.05%
32	Creative Planning	Overland Park, Kan.	40,979	69,482.47	45.00%	8.21%
33	Mission Wealth Management	Santa Barbara, Calif.	1,638	3,725.61	44.64%	8.62%
34	HoyleCohen††	San Diego, Calif.	1,200	2,766.23	42.85%	39.28%
35	McKinley Carter Wealth Services	Wheeling, W.Va.	1,694	1,814.68	42.62%	-20.36%
36	Quadrant Private Wealth	Bethlehem, Pa.	630	991.91	42.47%	-14.07%
37	Robertson Stephens Wealth Management	San Francisco, Calif.	346	1,707.54	42.43%	3.32%
38	Lido Advisors	Los Angeles, Calif.	2,820	7,692.39	42.36%	2.88%
39	One Capital Management	Westlake Village, Calif.	1,359	2,285.78	42.15%	4.60%
40	Frazier Financial Advisors	Dublin, Ohio	335	510.00	41.67%	31.09%
41	Rollins Financial	Atlanta, Ga.	893	953.82	41.38%	31.24%
42	Covington Capital Management	Los Angeles, Calif.	431	3,584.28	40.19%	59.38%
43	Regatta Capital Group	El Segundo, Calif.	800	682.41	40.09%	18.20%
44	Ritholtz Wealth Management	New York, N.Y.	1,458	1,806.28	39.09%	6.27%
45	Ensemble Capital Management	Burlingame, Calif.	245	1,399.26	38.44%	14.14%
46	PDS Planning	Dublin, Ohio	588	941.73	38.04%	27.95%
47	Abacus Wealth Partners	Santa Monica, Calif.	1,670	3,750.00	37.56%	29.33%
48	AJ Wealth	New York, N.Y.	241	2,037.00	37.36%	24.25%
49	Paragon Capital Management	Denver, Colo.	149	1,115.93	36.65%	40.31%
50	Miracle Mile Advisors	Los Angeles, Calif.	695	2,012.82	36.41%	11.68%

††Correction to 2019 AUM due to reporting error by firm.

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