

AMERICA'S TOP 100 FINANCIAL PLANNER RIAs

This year's list represents top independent registered investment advisories that primarily do retail fee-only financial planning, as ranked by assets. As in past years, we screened the SEC's Form ADV database (provided to us by FINRA) for RIAs who declared that at least half of their business was managing the portfolios and investments of retail clients, both mass affluent and high-net-worth. All advisors on this list provide financial planning services, portfolio management for individuals and ongoing financial planning advice. To make the cut, they had to be fee-based only, and not accept commissions. In addition, we removed fund managers and their subsidiaries. And to keep the list as tightly focused as possible, we screened out RIAs that also do business as broker/dealers. But we did allow RIAs with registered reps—as long as they acted in a fee-only capacity within the firm. The data was collected on June 1, 2010.

Primary Business Name	City	Web Site Address	No. of Employees Who Perform Advisory Functions	No. of Clients	Discretionary Assets (\$ml)	Nondiscretionary Assets (\$ml)	Total AUM (\$ml)	Total # of Accounts
Financial Engines Advisors L.L.C. #1	Palo Alto, Ca	www.financialengines.com	11-50	more than 500	25,766.9	0	25,766.9	431,337
		network.com						
4. Guided Choice Asset Management, Inc.	San Diego, CA	www.guidedchoice.com	11-50	more than 500	19,238.8	0	19,238.8	420,000
5. Stancorp Investment Advisers, Inc.	Portland, OR	www.stancorpinancial.com	11-50	more than 500	7,779.7	10,783.2	18,562.9	18,791
6. Genspring Family Offices, LLC	Palm Beach Gardens, FL	www.genspring.com	51-250	more than 500	10,929.6	5,999.3	16,928.9	5,249
7. Convergent Wealth Advisors, LLC	Rockville, MD	www.convergentwealth.com	51-250	more than 500	4,361.6	5,875.6	10,237.2	5,857
8. Brinker Capital Inc	Berwyn, PA	www.brinkercapital.com	11-50	more than 500	4,922.1	3,954.0	8,876.1	29,115
9. Silvercrest Asset Management Group LLC	New York, NY	www.silvercrestgroup.com	11-50	more than 500	5,384.1	3,204.3	8,588.4	3,456
10. Oxford Financial Group, Ltd	Carmel, IN	www.ofgltd.com	11-50	more than 500	372.0	8,066.5	8,438.5	4,844
11. SCS Capital Management LLC	Boston, MA	www.scsfinancial.com	11-50	101-250	6,705.0	0	6,705.0	124
12. Tag Associates LLC	New York, NY	www.tagassoc.com	11-50	101-250	506.5	5,983.6	6,490.1	958
13. Plante Moran Financial Advisors	Southfield, MI	www.pmfa.com	11-50	more than 500	2,604.2	2,507.6	5,111.8	1,966
14. Ronald Blue & Co. LLC	Roswell, GA	www.ronblue.com	51-250	more than 500	4,817.6	60.1	4,877.8	12,544



Financial Engines® and Retirement Help for Life® are registered trademarks or service marks of Financial Engines, Inc. Advisory services provided through Financial Engines Advisors L.L.C., a registered investment advisor and wholly owned subsidiary of Financial Engines, Inc. Financial Engines does not guarantee future results.