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Top Advisors

Growth Surge

Halah Touryalai, 01.13.11, 06:00 PM EST

The top 50 fastest-growing Registered Investment Advisors.

While the economic downturn was a harsh reality for much of the financial world, these RIAs managed to grow their firms at rapid rates during the recession. The RIAs on this list added the most net new assets to their firms since 2008. The source of the new assets: Wall Street brokers who joined them and brought along clients, investors who left their old financial advisors on Wall Street and acquisitions of other RIAs.

RANK ▲	COMPANY ◆	DISCRETIONARY ASSETS (\$MIL) ◆	ASSET GROWTH* (\$MIL) ◆	HEADQUARTERS ◆	EXECUTIVE ◆
1	Genspring Family Offices	10,973.9	16,807.7	Palm Beach Gardens, FL	Maria Elena Lagomasino
2	SCS Capital Management	6,705.0	6,705.0	Boston, MA	Peter Mattoon
3	Evercore Wealth Management	1,960.0	2,012.0	New York, NY	Jeffrey Maurer
4	Ballentine Partners	1,650.0	2,890.0	Wolfeboro, NH	Roy Ballentine
5	Luminous Capital	2,818.7	3,145.2	Los Angeles, CA	Mark Sear
6	Miller/Russell & Associates	889.4	1,100.0	Phoenix, AZ	Dennis Miller
7	Reinhart Partners	2,770.3	2,770.3	Mequon, WI	James Reinhart
8	Covenant Multi-family Offices	776.0	776.0	San Antonio, TX	John Eadie
9	Gibson Capital	752.3	844.3	Wexford, PA	Brenda Gibson
10	Signature Financial Management	1,504.9	2,088.3	Norfolk, VA	Anne Shumadine
11	Dimeo Schneider &	882.3	3,328.9	Chicago, IL	Robert DiMeo

Associates					
12	Joel Isaacson & Co.	599.8	1,582.5	New York, NY	Joel Isaacson
13	Pathstone Family Office	596.1	596.1	Englewood, NJ	Steve Braverman
14	Meditron Asset Management	1,000.0	1,000.0	New York, NY	Walter Gerasimowicz
15	Retirement Income Solutions	568.5	568.5	Ann Arbor, MI	Griffith McDonald
16	Offit Capital Advisors	724.9	4,236.3	New York, NY	Morris Offit
17	BBR Partners	3,735.0	4,098.9	New York, NY	Cary Klivan
18	ParenteBeard Wealth Management	520.7	528.8	York, PA	Robert Ciaruffoli
19	Creative Planning	1,020.9	1,322.5	Overland Park, KS	Peter Mallouk
20	Northwest Capital Management	1,297.0	1,654.0	Portland, OR	Frederick Payne
21	Granite Investment Advisors	480.1	484.0	Concord, NH	Timothy Lesko
22	Globe Wealth Advisors	474.6	474.6	Deerfield, IL	George Getz
23	Mill Creek Capital Advisors	1,304.1	1,499.6	Conshohocken, PA	Richard Stevens
24	Relyea Zuckerberg Hanson	422.0	422.0	Stamford, CT	Dana Hanson
25	Silver Bridge	1,573.3	1,629.8	Boston, MA	Stephen Prozano
26	Endurance Wealth Management	409.0	409.0	Providence, RI	Michael Costello
27	Pampel & Associates	439.2	439.2	Monticello, IN	Larry Pampel
28	Oxford Financial Group	372.0	8,438.5	Carmel, IN	Jeffrey Thomasson
29	Financial Planning Unlimited	373.1	373.1	Las Vegas, NV	Patrick Valenty
30	Eton Advisors	366.6	582.5	Chapel Hill, NC	Robert Mallernee
31	Hewins Financial Advisors	700.0	2,016.0	San Mateo, CA	Roger Hewins
32	Myvest Corporation	403.7	408.6	San Francisco, CA	Chuck Lewis
33	The Harbor Group	379.7	603.7	Bedford, NH	Timothy Riley
34	Botty Investors	347.0	380.0	Chicago, IL	Alfredo Botty
35	Total Investment Management	470.2	470.2	Scottsdale, AZ	John Foster
36	Alesco Advisors	1,018.2	1,018.2	Pittsford, NY	James Gould
37	Briaud Financial Advisors	340.5	457.0	Bryan, TX	Janet Briaud
38	Edge Wealth Management	380.0	380.0	New York, NY	Matthew Weinberg

39	Daintree Advisors	314.0	314.0	Boston, MA	David Beatty
40	Glassman Wealth Services	309.8	309.8	Mclean, VA	Barry Glassman
41	Nuverse Advisors	817.7	822.8	New York, NY	Dov Schlein
42	Congress Wealth Management	300.0	300.0	Boston, MA	Paul Lonergan
43	Spruce Private Investors	436.4	2,505.9	Stamford, CT	John Bailey
44	Independence Advisors	287.2	329.2	Wayne, PA	Charles Boinske
45	Trinity Portfolio Advisors	283.9	283.9	Fort Worth, TX	Dee Cullum
46	Cliffwater	275.9	275.9	Marina Del Rey, CA	Stephen Nesbitt
47	Filament	502.7	785.9	Seattle, WA	John Goodwin
48	Hillview Capital Advisors	1,090.4	1,090.4	Radnor, PA	David Spungen
49	Adviser Investments	1,140.0	1,140.0	Newton, MA	Daniel Wiener
50	Capital Investment Counsel	1,622.0	1,622.0	Denver, CO	Chris Johnson

*Growth of discretionary assets under management, Dec. 31, 2008, to Sept. 30, 2010.

Source: [RIA Database](#).

Methodology: [Top 50 Financial Advisors](#)