

Nick Murray

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# FINANCIAL ADVISOR

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## Asset Category: \$300 Million To \$500 Million

Growth Rank In Category	#	FIRM NAME	LOCATION	Growth in Assets 2004-2005 %	Year-end 2005 Assets (\$MM)	Assets Per Client Relationship (\$MM)	Growth In Assets Per Relationship %	Rank In Assets Per Relationship OVERALL
1	1	Glenn Woody Financial Consultants Inc.	Costa Mesa, Calif.	148.96	318.41	1.13	149.84	165
2	2	Creative Planning	Overland Park, Kan.	123.45	342.00	1.25	196.03	141
3	3	Golub Group, LLC	San Mateo, Calif.	53.49	418.26	1.82	160.27	83
4	4	Fairway Wealth Management LLC	Westlake, Ohio	49.25	300.00	6.00	76.12	19
5	5	Jackson Financial Management	Newport Beach, Calif.	44.12	361.44	1.56	54.06	106
6	6	CFS Investment Advisory Services	Totowa, N.J.	43.51	411.49	1.27	52.34	138
7	7	WMS Partners, LLC	Baltimore, Md.	38.87	308.94	1.87	41.39	79
8	8	Gemmer Asset Management LLC	Walnut Creek, Calif.	34.79	351.73	0.89	49.05	211
9	9	Capital Performance Advisors, Inc.	Walnut Creek, Calif.	31.27	456.46	0.85	44.44	221
10	10	Brightworth, LLC	Norcross, Ga.	26.88	497.70	2.65	40.38	50
11	11	Obermeyer Asset Mgt. Company	Aspen, Colo.	26.69	455.00	1.60	44.92	102
12	12	Spero-Smith Investment Advisers, Inc.	Cleveland, Ohio	24.65	303.22	1.14	28.40	161
13	13	Rowland Carmichael Advisors, Inc.	Scottsdale, Ariz.	22.21	359.33	2.29	28.43	60
14	14	Summit Financial Strategies, Inc.	Columbus, Ohio	22.16	332.13	1.15	40.70	160
15	15	The Harbor Group, Inc.	Bedford, N.H.	22.07	455.21	0.80	28.07	237
16	16	Sierra Investment Management, Inc.	Santa Monica, Calif.	21.33	455.00	0.76	31.44	251
17	17	Shine Investment Advisory Services Inc.	Lone Tree, Colo.	20.82	365.16	2.10	27.07	69
18	18	First Capital Equities	Great Neck, N.Y.	20.27	350.00	1.29	50.90	136
19	19	The Welch Group, LLC	Birmingham, Ala.	19.33	306.81	1.15	29.65	158
20	20	Petersen Hastings Investment Mgt.	Kennewick, Wash.	18.80	308.50	0.65	25.29	275
21	21	Strategic Wealth Management Group	Columbia, Md.	18.34	432.27	0.82	24.41	232
22	22	L.J. Altfest & Co., Inc.	New York, N.Y.	17.41	350.00	1.35	35.09	125
23	23	Truepoint Capital	Cincinnati, Ohio	16.43	497.17	2.02	34.89	71
24	24	Sigma Investment Counselors, Inc.	Southfield, Mich.	15.93	444.00	1.04	22.75	183
25	25	Charles D. Haines, LLC	Birmingham, Ala.	14.05	440.02	2.19	22.00	64
26	26	Modern Portfolio Management, Inc.	Maumee, Ohio	12.96	305.00	0.16	12.96	366
27	27	Foster & Motley, Inc.	Cincinnati, Ohio	12.90	455.00	2.05	41.89	70
28	28	Legacy Wealth Management, Inc.	Memphis, Tenn.	12.90	382.10	1.01	12.30	191
29	29	Blankinship & Foster	Solana Beach, Calif.	12.76	303.17	1.20	21.67	152
30	30	Briaud Financial Planning, Inc.	Bryan, Texas	12.09	349.06	1.44	9.32	118
31	31	Evensky & Katz	Coral Gables, Fla.	10.89	474.50	2.37	21.98	57
32	32	Sadoff Investment Management LLC	Milwaukee, Wis.	10.31	386.40	0.86	12.76	218
33	33	The Monitor Group, Inc.	McLean, Va.	9.06	341.37	1.60	-1.13	103
34	34	John E. Sestina and Company	Columbus, Ohio	9.02	447.00	1.63	28.85	99
35	35	M.J. Smith and Associates	Englewood, Colo.	8.64	440.00	0.77	0.52	245
36	36	Henssler Asset Management, LLC	Kennesaw, Ga.	6.16	305.75	3.12	19.16	41
37	37	Arthur M. Cohen & Associates LLC	Northbrook, Ill.	4.88	430.00	3.74	14.00	33
38	38	Fieldstone Financial Mgt. Group	Boston, Mass.	2.83	436.00	2.97	7.03	45
39	39	Braver Wealth Management	Newton, Mass.	2.53	334.40	1.03	4.42	186
40	40	Highland Capital Management LLC	Seattle, Wash.	1.49	330.07	6.35	-0.46	18
41	41	American Economic Planning Group Inc.	Watchung, N.J.	-11.55	486.50	1.10	-10.15	174

## Asset Category: \$100 Million To \$300 Million

Growth Rank In Category	#	FIRM NAME	LOCATION	Growth in Assets 2004-2005 %	Year-end 2005 Assets (\$MM)	Assets Per Client Relationship (\$MM)	Growth In Assets Per Relationship %	Rank Assets Per Relationship OVERALL
1	1	Centara Capital	San Diego, Calif.	400.00	125.00	0.21	983.33	359
2	2	Investors Capital Management	Menlo Park, Calif.	212.46	105.30	0.66	358.93	272
3	3	Baron Financial Group	Fair Lawn, N.J.	212.20	128.00	1.07	420.33	176
4	4	JWA Financial Group, Inc.	Dallas, Texas	122.25	171.01	1.45	318.14	117
5	5	Crestwood Advisors LLC	Boston, Mass.	98.77	161.00	4.88	285.48	25
6	6	Patriot Wealth Management, Inc.	Houston, Texas	96.07	274.50	3.87	220.34	32
7	7	Pinnacle Fund Management, Inc.	Chicago, Ill.	71.67	103.00	0.09	128.89	374
8	8	The Financial Network Group, Ltd.	Cincinnati, Ohio	70.37	278.56	0.07	103.49	376
9	9	Wealth Care Group Asset Management	Lafayette, La.	66.67	100.00	1.00	150.00	194
10	10	Demicell Wealth Managers, Inc.	Pueblo, Colo.	65.26	109.80	2.61	112.48	52
11	11	Warren, Averett, Kimbrough, & Marino	Birmingham, Ala.	58.92	225.79	1.79	89.19	87
12	12	Proctor Financial, Inc.	Wellesley, Mass.	57.43	124.25	0.88	128.38	212
13	13	Everhart Financial Group Inc.	Dublin, Ohio	54.55	170.00	0.42	93.18	316
14	14	The Lasecke Weil Wealth Advisory Group	Palo Alto, Calif.	54.43	142.00	1.05	20.11	181
15	15	Sovereign Wealth Management, Inc.	Memphis, Tenn.	54.37	172.99	2.01	83.09	73
16	16	Meg Green & Associates	North Miami Beach, Fla.	52.94	130.00	0.52	83.53	300