

# TEAM 'BUILDERS'



BY NEVIN E. ADAMS, JD



n the pages that follow, we are pleased to unveil our first-ever list of Top DC Advisor Teams.

Since their inception, NAPA's various industry lists have been a valuable Who's Who of who matters in the world of retirement plans and plan advisors. Now we open another chapter — the NAPA Top DC Advisor Teams, ranked by self-reported DC assets under advisement.

Unlike other, similar lists, this one focuses on firms, or what may, in a wirehouse environment, be referred to as a team or office, and on defined contribution practices exclusively. While we used the terms "team" and "office" interchangeably during the development process and online promotion of the list, we have decided to embrace "teams" in the list's official name, since the term captures the essence of a group of individuals pulling together toward a common goal.

Every one of the 275 teams on our inaugural list has in excess of \$100 million in DC assets under advisement. Think about that for a second: It means a total of \$275 billion in DC assets guided by the teams listed on the following pages.

Sure, we know it's not just about the numbers — but the reality is that advisors are having a huge impact every single day, not only on the quality of retirement plan advice, but in building a more financially secure retirement for millions of Americans.

We appreciate the commitment and hard work of the teams acknowledged on the following pages — and we're proud to have the opportunity to share it here.

Advisor Team	Location	Year Est.	Total DC Plan Assets 12/31/16	Total DC Plans 12/31/16	Total DC Participants 12/31/16
<b>CAPTRUST</b> captrustadvisors.com	Raleigh, NC	1997	\$50,641,070,011	432	4,000,000
<b>CAPTRUST</b> captrustadvisors.com	Richmond, VA	2005	\$22,570,901,767	146	420,000
<b>CAPTRUST</b> captrustadvisors.com	Charlotte, NC	2003	\$18,020,792,966	89	201,000
<b>CAPTRUST</b> captrustadvisors.com	Eden Prairie, MN	1995	\$17,309,112,734	87	200,000
<b>Multnomah Group, Inc.</b> multnomahgroup.com	Portland, OR	2003	\$15,682,929,554	154	N/A
<b>NEXT Retirement Solutions</b> nextretirementsolutions.com	San Diego, CA	1994	\$15,000,000,000	200	450,000
<b>Centurion Group, LLC</b> centuriongroupllc.com	Plymouth Meeting, PA	2006	\$14,100,000,000	170	510,000
<b>Retirement Benefits Group</b> rbgnrp.com	San Diego, CA	2009	\$13,500,000,000	675	161,000
<b>Advanced Capital Group</b> acgbiz.com	Minneapolis, MN	1998	\$13,300,000,000	110	140,000
<b>CBIZ Retirement Plan Services</b> cbiz.com/retirement	Cleveland, OH	1998	\$12,422,338,490	850	230,893
<b>CAPTRUST</b> captrustadvisors.com	Doylestown, PA	2006	\$12,049,747,068	127	500,000
<b>Sheridan Road Financial, LLC</b> sheridanroad.com	Northbrook, IL	2005	\$12,000,000,000	300	550,000
<b>CAPTRUST</b> captrustadvisors.com	Portland, ME	2006	\$11,400,538,773	51	116,000
<b>FiduciaryVest</b> fiduciaryvest.com	Atlanta, GA	2005	\$11,007,000,000	47	161,566
<b>Marsh &amp; McLennan Agency</b> mmaretirement.com	San Diego, CA	2002	\$10,529,000,000	710	168,000
<b>Innovest Portfolio Solutions</b> innovestinc.com	Denver, CO	1996	\$10,300,000,000	117	193,000
<b>Newport Capital Group</b> newportcapitalgroup.com	Red Bank, NJ	2004	\$9,700,000,000	116	112,549
<b>Benefit Financial Services Group</b> bfsg.com	Irvine, CA	1990	\$9,000,000,000	127	Not Tracked
<b>MJM401k</b> mjm401k.com	Pasadena, CA	2005	\$8,495,455,511	78	88,901
<b>Investment Research &amp; Advisory Group</b> iragroup.com	Atlanta, GA	1992	\$8,400,000,000	108	127,880
<b>Westminster Consulting, LLC</b> westminster-consulting.com	Rochester, NY	2003	\$8,000,000,000	60	100,000
<b>CAPTRUST</b> captrustadvisors.com	Tampa, FL	1998	\$7,700,000,000	116	108,000
<b>The PFE Group</b> pfe-group.com	Newport Beach, CA	1996	\$7,200,000,000	160	1,100,000
<b>CAPTRUST</b> captrustadvisors.com	Atlanta, GA	2005	\$7,118,273,627	46	94,000

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<b>CAPTRUST</b> captrustadvisors.com	Dallas, TX	2010	\$7,037,564,653	38	78,000
<b>Compass Financial Partners</b> CompassFP.com	Greensboro, NC	2002	\$7,000,000,000	125	93,000
<b>Blue Prairie Group</b> blueprairiegroup.com	Chicago, IL	2002	\$6,800,000,000	93	100,000
<b>CAPTRUST</b> captrustadvisors.com	Lake Mary, FL	2010	\$6,685,206,803	40	110,000
<b>Sentinel Benefits &amp; Financial Group, A Member Firm of GRP Advisor Alliance</b> sentinelgroup.com	Wakefield, MA	1987	\$6,600,000,000	1700	55,500
<b>CAPTRUST</b> captrustadvisors.com	Akron, OH	2001	\$6,456,052,511	82	100,000
<b>gladinggroup.com</b> gladinggroup.com	Montclair, NJ	2002	\$6,000,000,000	15	40,000
<b>Strategic Retirement Partners</b> srpretire.com	Shorewood, IL	2015	\$6,000,000,000	475	60,000
<b>Marsh &amp; McLennan Agency</b> mma-ne.com	Boston, MA	2008	\$5,846,692,169	260	23,000
<b>Resources Investment Advisors, Inc.</b> riaadvisor.com	Leawood, KS	1987	\$5,653,000,000	589	85,434
<b>CAPTRUST</b> captrustadvisors.com	Bethlehem, PA	2000	\$5,458,622,600	76	122,000
<b>WhartonHill Advisors, A Member Firm of GRP Advisor Alliance</b> whartonhill.com	Ft. Washington, PA	1990	\$5,366,193,602	220	65,588
<b>CAPTRUST</b> captrustadvisors.com	Westlake Village, CA	2009	\$5,008,332,762	68	185,800
<b>Graystone Consulting Los Angeles</b> msgraystone.com/losangeles	Westlake Village, CA	1998	\$4,669,864,144	42	100,000 plus
<b>NFP Corporate Services (SE)</b> nfp.com	Charlotte, NC	1991 (Southeast Region)	\$4,500,000,000	300	250,000
<b>Mesirow Financial</b> mesirowfinancial.com/markets/corporations/rpa	Chicago, IL	1937	\$4,300,000,000	255	120,000
<b>Ascende Wealth Advisers, Member Firm of GRP Advisor Alliance</b> ascende.com/Consulting-Capabilities/Retirement	Houston, TX	2011	\$4,200,000,000	119	150,000
<b>Cantor Fitzgerald Wealth Partners, Pittsburgh</b> CFWP.com	Pittsburgh, PA	2014	\$3,700,000,000	29	60,000
<b>Sentinel Pension Advisors, Inc.</b> sentinelgroup.com	Wakefield, MA	1987	\$3,634,688,886	432	44,759
<b>The Parks Group at Graystone Consulting</b> msgraystone.com/tomparks	Milwaukee, WI	1981	\$3,616,654,038	66	75000
<b>MRP</b> mrpretire.com	Denver, CO	2005	\$3,600,000,000	190	40,000
<b>Moneta Group Investment Advisors</b> monetagroup.com	St. Louis, MO	1869	\$3,407,093,992	290	20,000
<b>Mayflower Advisors, LLC</b> mayfloweradvisors.com	Boston, MA	2002	\$3,300,000,000	160	20,000

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<b>FiduciaryFirst</b> fiduciaryfirst.com	Orlando, FL	2006	\$3,200,000,000	60	30,000
<b>Precept Advisory Group LLC</b> preceptadvisory.com	Irvine, CA	1991	\$3,200,000,000	62	45,000
<b>Intelligents Investment Solutions, Inc.</b> intelligents.com	Albert Lea, MN	1974	\$3,000,000,000	200	40,000
<b>The Robertson Group at Graystone Consulting</b> morganstanleyfa.com/therobertsongroup	Columbus, OH	1994	\$1,800,000,000	30	18,000
<b>Pension Consultants, Inc.</b> pension-consultants.com	Springfield, MO	1994	\$2,922,207,634	162	260,313
<b>ProCourse Fiduciary Advisors</b> procourseadv.com	Carmel, IN	2012 <i>(Team in 1998)</i>	\$2,900,000,000	95	50,000
<b>Graystone Consulting   Boston North Shore</b> msgraystone.com/graystoneconsultingbos- ton-northshore/	Middleton, MA	1999	\$3,300,000,000	35	60,000
<b>Enterprise Retirement Solutions</b> amegybank.com/business/investment-services/ retirement-plan-services	Houston, TX	1995	\$2,660,000,000	212	28,000
<b>Baystate Fiduciary Advisors, A Member Firm of GRP Advisor Alliance</b> bfa401k.com	Boston, MA	2002	\$2,616,591,787	37	14,971
<b>Graystone Consulting - The Atlantic Group</b> msgraystone.com/theatlanticgroup/	Boca Raton, FL	2002	\$2,600,000,000	70	40,000
<b>CAPTRUST</b> captrustadvisors.com	Des Moines, IA	1998	\$2,535,977,202	103	60,000
<b>Pensionmark Financial Group, LLC</b> pensionmark.com	Santa Barbara, CA	1988	\$2,500,000,000	80	60,000
<b>SHA Retirement Group</b> SHAretirement.com	Auburn Hills, MI	2002	\$2,500,000,000	55	12,000
<b>StoneStreet Advisor Group</b> ssadvisorgroup.com	Pearl River, NY	1998	\$2,500,000,000	55	75,000
<b>White Oak Advisors, LLC</b> whiteoakadvisors.com	Indianapolis, IN	2004	\$2,420,000,000	48	51,500
<b>Conrad Siegel Actuaries</b> conradsiegel.com	Harrisburg, PA	1963	\$2,418,832,646	218	54,160
<b>401k Advisors Intermountain</b> 401kaim.com	Sandy, UT	1992	\$2,400,000,000	120	45,000
<b>Fiduciary Plan Advisors</b> htfpa.com	Owings Mills, MD	2014	\$2,400,000,000	105	30,000
<b>Graystone Consulting   Cincinnati</b> morganstanleygc.com/graystoneconsultingcincinnati/	Cincinnati, OH	N/A	\$2,400,000,000	63	>100,000
<b>Cafaro Greenleaf</b> CafaroGreenleaf.com	Red Bank, NJ	1981	\$2,200,000,000	125	70,000
<b>Graystone Consulting</b> msgraystone.com/thergroup	Columbus, OH	1994	\$2,200,000,000	20	21,000
<b>Bukaty Companies Financial Services</b> bukatyfs.com	Leawood, KS	2001	\$2,138,619,277	240	38,731
<b>The Kelliher Corbett Group at Morgan Stanley</b> KelliherCorbettGroup.com	Norwell, MA	1992	\$2,100,000,000	110	40,000

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<b>Pacific Portfolio Consulting</b> pacific-portfolio.com	Seattle, WA	1992	\$2,100,000,000	51	Estimate 15k
<b>Buckingham Strategic Wealth</b> buckinghamadvisor.com	St. Louis, MO	1994	\$2,080,997,108	786	17,116
<b>CAPTRUST</b> captrustadvisors.com	Birmingham, AL	2008	\$2,043,667,107	30	53,000
<b>The Wilshinsky Group at Morgan Stanley</b> morganstanleyfa.com/wilshinskygroupsb	New York, NY	1972	\$2,038,000,000	40	25,000
<b>Oswald Financial, Inc. Member Firm of GRP Advisor Alliance</b> oswaldfinancial.com	Cleveland, OH	1999	\$2,000,000,000	280	75,000
<b>Rogers Financial Pensionmark</b> pensionmark.com	Harrisonburg, VA	1994	\$2,000,000,000	40	25,000
<b>Handler Investment Consulting Group of Raymond James</b> handlerinvestmentconsultinggroup.com	Beverly Hills, CA	1991	\$1,900,000,000	55	45,000
<b>Alpha Pension Group, A Member Firm of GRP Advisor Alliance</b> alphapension.com	Lexington, MA	2003	\$1,800,000,000	405	44,000
<b>Avondale Partners, Member Firm of GRP Advisor Alliance</b> avondalepartnersllc.com/wealth-and-invest- ment-retirement-plans/	Nashville, TN	2001	\$1,800,000,000	36	45,000
<b>Bridgehaven Fiduciary Partners</b> bridgehavenfp.com	Warren, NJ	2006	\$1,800,000,000	50	20,000+
<b>Bronfman Rothschild Plan Advisors</b> belr.com	Rockville, MD	1997	\$1,800,000,000	91	40,000+
<b>CAPTRUST</b> captrustadvisors.com	Austin, TX	2010	\$1,800,000,000	31	35,000
<b>Heuer Wenzel &amp; Associates/ Merrill Lynch</b> fa.ml.com/HeuerWenzel	Houston, TX	2012	\$1,800,000,000	42	30,000
<b>GRP Financial</b> grpfinancial.com	San Juan Capistrano, CA	2014	\$1,700,000,000	70	40,000
<b>Sequoia Consulting Group</b> sequoia.com	San Mateo, CA	2001	\$1,700,000,000	335	60,000
<b>Hooker &amp; Holcombe Investment Advisors</b> hhconsultants.com	West Hartford, CT	1997	\$1,683,700,000	78	26,800
<b>ABG of Michigan, A Member Firm of GRP Advisor Alliance</b> abgmi.com	Bingham Farms, MI	1969	\$1,618,000,000	365	26,460
<b>Hickok &amp; Boardman Retirement Solutions</b> hbretirementsolutions.com	Burlington, VT	1983	\$1,600,000,000	65	25,000
<b>Johnson Sterling, Inc.</b> johnsonsterling.com	Birmingham, AL	1988	\$1,600,000,000	6	30,000
<b>Spectrum Investment Advisors, Inc.</b> spectruminvestor.com	Mequon, WI	1995	\$1,559,720,241	130	21,000
<b>401k Advisors Chicago</b> 401kadvisorschicago.com	Wilmette, IL	2001	\$1,500,000,000	120	56,000
<b>Clearview Advisory</b> clearviewadvisory.com	Atlanta, GA	2001	\$1,500,000,000	80	N/A

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<b>HB Retirement, A Member Firm of GRP Advisor Alliance</b> h Bretirement.com	Pittsburgh, PA	2005	\$1,500,000,000	245	100,000
<b>Lebel &amp; Harriman, LLP</b> lebelharriman.com	Falmouth, ME	1978	\$1,500,000,000	198	9,200
<b>The Noble Group</b> thenoblegroup.com	Sugar Land, TX	1996	\$1,500,000,000	125	30,000
<b>Plan Sponsor Consultants</b> plansponsorconsultants.com	Alpharetta, GA	2008	\$1,500,000,000	157	42,000
<b>WealthPlan Advisors</b> wealthplanadvisor.com	Scottsdale, AZ	2009	\$1,500,000,000	160	60,000
<b>Woodruff-Sawyer &amp; Co.</b> wsandco.com	San Francisco , CA	1918	\$1,500,000,000	94	23,000
<b>LeafHouse Financial Advisors</b> leafhousefinancial.com	Austin, TX	2009	\$1,489,677,662	360	45,000
<b>LAMCO Advisory Services, Inc.</b> lamcoadvisory.com	Lake Mary, FL	1990	\$1,450,000,000	57	28,000
<b>Associated Financial Group, LLC</b> associatedfinancialgroup.com	Minnetonka, MN	1984	\$1,320,000,000	230	29450
<b>The Kieckhefer Group</b> kieckhefergroup.com	Brookfield, WI	1999	\$1,317,532,810	42	12,000
<b>CAPTRUST</b> captrustadvisors.com	Clarkston, MI	1988	\$1,302,786,584	260	17,000
<b>Comperio Retirement Consulting, Inc.</b> comperiorc.com	Cary, NC	2006	\$1,300,000,000	30	15,000
<b>Cornerstone Advisors Asset Management, LLC</b> cornerstone-companies.com	Bethlehem, PA	N/A	\$1,300,000,000	19	12,400
<b>VisionPoint, Member Firm of GRP Advisor Alliance</b> vpadvisor.com	Dallas, TX	1981	\$1,300,000,000	88	57,000
<b>Montgomery Retirement Plan Advisors</b> m-rpa.com	Tampa, FL	2004	\$1,293,432,743	75	2,100
<b>AFS 401(k) Retirement Services, A Member Firm of GRP Advisor Alliance</b> afs401k.com	Bethesda, MD	2006	\$1,270,000,000	65	14,450
<b>Mariner Retirement Advisors</b> marinerretirement.com	Leawood, KS	2014	\$1,269,769,670	168	21,838
<b>TrueNorth, Inc.</b> truenorthcorp.com	Wichita, KS	1999	\$1,250,000,000	207	24,826
<b>Wintrust Retirement Plan Services</b> rps@wintrustwealth.com	Chicago, IL	200	\$1,250,000,000	130	35,000
<b>The Beacon Group at Morgan Stanley</b> morganstanleyfa.com/thebeacongrp	Jenkintown, PA	1997	\$1,200,000,000	105	10,000
<b>Chepenik Financial</b> chepenikfinancial.com	Winter Park, FL	1973	\$1,200,000,000	78	53,000
<b>Washington Financial Group</b> washfinancial.com	McLean, VA	1983	\$1,200,000,000	142	30,000
<b>StoneStreet Equity, LLC</b> stonestreetequity.com	White Plains, NY	N/A	\$1,150,000,000	30	30,000
<b>Graystone Consulting - Atlanta</b> msgraystone.com/graystoneatlanta	Atlanta, GA	1997	\$1,139,130,295	67	25,000

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<b>Channel Financial</b> channelfinancial.com	Golden Valley, MN	2002	\$1,100,000,000	170	16,500
<b>Paris International</b> parisint.com	Great Neck, NY	1970	\$1,100,000,000	200	100,000
<b>Renaissance Benefit Advisors Group, LLC</b> renaissanceba.com	Pearl River, NY	2008	\$1,100,000,000	28	16,000
<b>The Trust Company</b> thetrust.com	Knoxville, TN	1987	\$1,100,000,000	191	24,464
<b>The KNW Group</b> knwgroup.com	Minnetonka, MN	2002	\$1,066,870,462	108	20,000
<b>The SeaPort Group at Morgan Stanley</b> morganstanley.com	Portland , OR	2004	\$1,053,000,000	38	14,000
<b>The Mahoney Group</b> mahoneygroupadvisors.com	West Nyack, NY	1992	\$1,000,000,000	40	20,000
<b>Mercer DC Advisors</b> mercerc.com	Chicago, IL	N/A	\$1,000,000,000	35	25,000
<b>The Post Oak Group at Morgan Stanley</b> fa.morganstanleyindividual.com/thepostoakgroup	Houston, TX	1978	\$1,000,000,000	20	15,000
<b>Sapers &amp; Wallack</b> sapers-wallack.com	Newton, MA	1932	\$1,000,000,000	50	15,000
<b>The Messner Group of Graystone Consulting</b> morganstanley.com/Graystone	Birmingham, MI	1992	\$990,000,000	37	18,000
<b>Sikich Retirement Plan Services</b> sikich.com/advisory/retirement-plan-services	Naperville, IL	1982	\$951,000,000	44	9,500
<b>Peak Financial Group, LLC</b> peakfinancialgroup.net	Houston, TX	2002	\$950,000,000	75	15,000
<b>CAPTRUST</b> captrustadvisors.com	New York, NY	2012	\$ 932,252,225	27	20,000
<b>First Western Trust</b> myfw.com	Denver, CO	2002	\$905,000,000	76	45,000
<b>CAPTRUST</b> captrustadvisors.com	Santa Barbara, CA	1988	\$903,044,098	55	20,000
<b>Heritage Institutional Services</b> heritagetrust.com/institutional	Oklahoma City, OK	2008	\$900,000,000	24	23,758
<b>The Ratay Group at Morgan Stanley</b> fa.morganstanley.com/rataygroup/index.htm	Lisle, IL	1985	\$885,000,000	44	6,000
<b>Plexus Financial</b> plexusfs.com	Deer Park, IL	1/13/2010	\$880,000,000	83	20,919
<b>HORAN Retirement Advisors</b> horanretire.com	Cincinnati, OH	1948	\$874,303,161	61	15,000
<b>BerganKDV Wealth Management, LLC</b> bergankdv.com	Bloomington, MN	2007	\$866,480,620	105	17,000
<b>TriBridge Partners, LLC</b> TriBridgePartners.com	Bethesda, MD	N/A	\$850,000,000	87	4,357
<b>RMB Capital</b> rmbcap.com	Chicago, IL	2005	\$826,012,573	38	7857
<b>Aid-Otillio Retirement Group of Wells Fargo Advisors</b> home.wellsfargoadvisors.com/001_NL	Brentwood, TN	2015	\$810,000,000	43	120,000



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<b>EPIC Retirement Services Consulting, LLC, A Member Firm of GRP Advisor Alliance</b> epicretirellc.com	New York, NY	1999	\$800,000,000	39	300,000
<b>The Kraematon Group, Inc.</b> kraematon.com	Wellesley, MA	1982	\$771,000,000	43	10,280
<b>Beacon Pointe Advisors</b> bpadvisors.com	Newport Beach, CA	2002	\$750,000,000	75	12,500
<b>Gordon Asset Management, LLC</b> wealthqb.com	Durham, NC	2001	\$750,000,000	160	12,000
<b>Lakeside Wealth Management</b> lakesidewealth.com	Chesterton, IN	2004	\$750,000,000	134	20,000
<b>CoBiz Retirement Advisory Services</b> cobizretirementadvisoryservices.com	Denver, CO	2010	\$730,000,000	70	12,000
<b>A.P. Lubrano &amp; Company, Inc.</b> aplubrano.com	Paoli, PA	1989	\$725,000,000	33	60,000
<b>Rehmann Financial</b> rehmann.com	Troy, MI	1941	\$725,000,000	269	13,681
<b>SLW Retirement Plan Advisors</b> slwadvisors.com	Lafayette, CA	2007	\$712,000,000	97	13,295
<b>E&amp;M Consulting</b> emrja.com	Strongsville, OH	1991	\$705,256,790	40	40,000
<b>Karpiak-Dupee Investment Group at Janney Montgomery Scott</b> KarpiakDupee.com	Philadelphia, PA	Firm: 1832 / Practice 1989	\$700,000,000	19	12,000
<b>Retirement Resources</b> RetireWithMore.com	Peabody, MA	1990	\$700,000,000	35	15,000
<b>MRA Associates</b> mraassociates.com	Phoenix, AZ	1991	\$684,000,000	49	18,000
<b>Assurance Financial Services (AFS)</b> assuranceagency.com/solutions/financial-services	Schaumburg, IL	2006	\$675,000,000	110	17,000
<b>Atlanta Retirement Partners</b> atlantaretirementpartners.com	Atlanta, GA	1998	\$675,000,000	70	10,210
<b>PPS Retirement Advisors, A Member Firm of GRP Advisor Alliance</b> ppspensions.net	Williamsville, NY	2017	\$670,000,000	270	12,450
<b>Valley Forge Financial Group</b> vffg.com	King of Prussia, PA	1967	\$653,000,000	145	9,800
<b>Shepherd Financial</b> shepherdfin.com	Carmel, IN	2015	\$646,240,892	120	12,398
<b>Guidance Point Retirement Services</b> guidancepointrs.com	Portland, ME	2012	\$643,159,753	55	12,863
<b>Fund Direct Advisors, Inc.</b> funddirectadvisors.com	Greensboro, NC	2010	\$600,000,000	125	17,000
<b>Graystone Consulting</b> morganstanleygc.com/graystoneconsultingpitcle	Hudson, OH	2012	\$600,000,000	60	18,000
<b>ISC Advisors, Inc.</b> iscgroup.com	Dallas, TX	1989	\$600,000,000	90	20,000
<b>RSG Advisory, A Member Firm of GRP Advisor Alliance</b> retirementsolutiongroup.com	Portsmouth, NH		\$584,331,543	180	7,359

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<b>True North Retirement Partners of Raymond James</b> TrueNorthRetirementPartners.com	Chicago, IL	2001	\$550,000,000	32	5,500
<b>CAPTRUST</b> captrustadvisors.com	Boston, MA	2012	\$537,433,427	20	45,000
<b>The MKP Group at Morgan Stanley</b> morganstanleyfa.com/themkpgroup	Indianapolis, IN	2012	\$525,000,000	36	12,000
<b>CAPTRUST</b> captrustadvisors.com	Port Washington, NY	2007	\$518,153,689	13	21,000
<b>Vita Planning Group</b> thevitacompanies.com	Mountain View, CA	1979	\$502,338,938	69	8,867
<b>AssuredPartners Colorado</b> assuredpartnerscolorado.com/services/retirement	Denver, CO	1997	\$500,000,000	58	10,000
<b>Level Four Wealth Management</b> levelfouradvisors.com	Plano, TX	2001	\$500,000,000	150	2,500
<b>Principled Advisors</b> principled.com	Staten Island, NY	2004	\$500,000,000	100+	5,000+
<b>Raffa Retirement Services, A Member Firm of GRP Advisor Alliance</b> raffaretirement.com	Rockville, MD	1999	\$500,000,000	130	5,200
<b>Rouleau Bevans Corleto Investment Consulting Group of Wells Fargo Advisors</b> rb-icg.com	Eugene, OR	1999	\$500,000,000	100	10,000
<b>LHD Retirement</b> lhdretirement.com	Indianapolis, IN	2004	\$475,000,000	103	9,200
<b>Cornerstone Institutional Investors, LLC</b> cornerstone-companies.com	Bethlehem, PA	N/A	\$470,000,000	71	19,600
<b>The RG Group</b> fa.ml.com/the_rg_group	Yardley, PA	2006	\$465,000,000	49	5,150
<b>Paradigm Group Retirement Services</b> paradigmgroupretirementservices.net	Nashville, TN	2007	\$460,000,000	28	7,100
<b>Aegis Retirement Group</b> aegisretirementgroup.com	Memphis, TN	1998	\$450,000,000	81	7,500
<b>AssuredPartners Colorado</b> assuredpartnerscolorado.com	Denver, CO	N/A	\$450,000,000	45	2,500
<b>BCI Group a Hub International Company</b> bcigroup.com	Portland, OR	1996	\$450,000,000	70	5,225
<b>Blueway Financial Partners of Raymond James</b> bluewayfinancial.com	Grand Rapids, MI	2000	\$450,000,000	9	6,000
<b>CCR Wealth Management, LLC</b> crwealth.com	Westborough, MA	1998	\$450,000,000	325	3,500
<b>CFS Investment Advisory Services, L.L.C.</b> cfsias.com	Totowa, NJ	1993	\$450,000,000	102	5000+
<b>Geringer, Laub &amp; Associates</b> fa.ml.com/geringerandlaub	Wichita, KS	1993	\$450,000,000	55	4,000
<b>PWMG 401(k) Advisors</b> pwmg401k.com	Worcester, MA	2010	\$450,000,000	369	5,000
<b>Aldrich Wealth LP</b> aldrichadvisors.com/wealth-management	Lake Oswego, OR	1998	\$445,000,000	70	7,475

Advisor Team	Location	Year Est.	Total DC Plan Assets 12/31/16	Total DC Plans 12/31/16	Total DC Participants 12/31/16
<b>Boulay Donnelly &amp; Supovitz Consulting Group, Inc.</b> bdsconsultinggroup.com	Worcester, MA	1969	\$440,000,000	129	6,500
<b>Kainos Partners, Inc. Pensionmark</b> kainos-partners.com	Jersey Village, TX	2011	\$425,000,000	66	6,600
<b>Silicon Valley Retirement Services</b> svretirementservices.com	San Jose, CA	2010	\$425,000,000	52	8,500
<b>Evergreen Consulting, Inc.</b> evergreenci.com	Chattanooga, TN	1990	\$410,000,000	42	41,000
<b>Kidder Advisers, LLC, Member Firm of GRP Advisor Alliance</b> kidderadvisers.com	West Des Moines, IA	1996	\$405,000,000	130	4,900
<b>Fiduciary Retirement Advisory Group, LLC</b> fiduciaryretirementadvisorygroup.com	Aliso Viejo, CA	2017	\$400,800,000	36 <i>(as of 6/30/17)</i>	5,400 <i>(as of 6/30/17)</i>
<b>CSI Advisory Services, A Member Firm of GRP Advisor Alliance</b> csiadvisoryservices.com	Indianapolis, IN	1971	\$400,000,000	225	17,000
<b>Flynn Benefits Group</b> flynnbenefits.com/Retirement-Services.4.htm	Troy, MI	1986	\$400,000,000	27	3,500
<b>The HF Retirement Group</b> thehfgroup.wfadv.com	Los Angeles, CA	2006	\$400,000,000	60	10,000
<b>JKJ Retirement Services</b> jkj.com	Newtown, PA	1956	\$400,000,000	45	4,000
<b>Titan Retirement Advisors LLC</b> titan-advisors.com	Houston, TX	2012	\$400,000,000	300	8,000
<b>Latus Group, Ltd.</b> latus-group.com	Las Vegas, NV	2009	\$398,000,000	57	13,500
<b>Westgate Capital Consultants</b> westgatecapital.com	Tacoma, WA	1988	\$390,000,000	110	6,250
<b>RTD Financial</b> rtdfinancial.com	Philadelphia, PA	1983	\$382,940,310	51	5,240
<b>Signature Estate &amp; Investment Advisors</b> seia.com	Los Angeles, CA	1997	\$380,000,000	55	4,380
<b>Trutina Financial</b> trutinafinancial.com	Bellevue, WA	2005	\$380,000,000	135	8,500
<b>RDH Investment Group</b> rdhinvestmentgroup.com	Spokane Valley, WA	2011	\$371,720,971	26	10,000
<b>The Bearing Group at Morgan Stanley</b> fa.morganstanley.com/thebearinggroup/index.htm	Chicago, IL	1992	\$367,200,000	33	6,735
<b>The Brice Group - Graystone Consulting</b> msgraystone.com/thebricegroup	Birmingham, MI	1967	\$366,681,735	27	7,300
<b>Capital Benefits, LLC</b> capitalbenefitsinc.com	Fairfield, NJ	2006	\$350,000,000	76	3,000
<b>JMB Wealth Management, Inc.</b> jmbwealthmanagement.com	Torrance, CA	2006	\$350,000,000	60	15,000
<b>MidAtlantic Retirement Planning Specialists</b> maretirementps.com	Wilmington, DE	1998	\$350,000,000	135	10,000+
<b>RCM&amp;D</b> rcmd.com	Towson, MD	1885	\$350,000,000	30	2,000
<b>Stark Miller Financial Benefits Group</b> starkmillerfbg.com	Lafayette, CA	1969	\$350,000,000	65	7,500

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<b>Infinitas Coordinated Wealth Management</b> infinitaswc.com	Overland Park, KS	1990	\$343,726,000	112	8,900
<b>Eukles Wealth Management</b> eukleswm.com	Cincinnati, OH	2011	\$341,325,000	38	7,050
<b>CAPTRUST</b> captrustadvisors.com	Houston, TX	2009	\$335,373,832	18	15,000
<b>CSG Capital Partners of Janney Montgomery Scott</b> csgcapitalpartners.com	Washington, DC	1998	\$320,000,000	26	4,500
<b>CAPTRUST</b> captrustadvisors.com	Greenwich, CT	2013	\$316,295,345	6	4,000
<b>Steidle Pension Solutions, LLC</b> sps401k.com	Lebanon, NJ	1991	\$315,000,000	340	1,890
<b>Tycor Benefit Administrators, Inc.</b> tycorbenefit.com	Berwyn, PA	1987	\$305,134,200	150	4,500
<b>The Corpening Group</b> alex-brown.com/corpeninggroup	Winston-Salem, NC	1993	\$305,000,000	18	3,000
<b>Emmett G. Dupas III, Northwestern Mutual</b> emmettdupasiii.com	Metairie, LA	2003	\$305,000,000	126	7,500
<b>Boston Partners Financial group, LLC</b> bostonpartnersfinancialgroup.com	Andover, MA	2002	\$300,000,000	57	10,000
<b>The Caves-Wiese Group</b> morganstanleyfa.com/thecaveswiesegroup	Los Angeles, CA	2012	\$300,000,000	55	10,000
<b>Chapman and Chapman, Inc.</b> chapmanandchapman.com	Twinsburg, OH	1886	\$300,000,000	60	8,500
<b>CoSource Financial Group, LLC</b> cosourcefinancial.com	Lafayette, LA	2001	\$300,000,000	160	7,500
<b>Douglas R. Peete &amp; Associates, Member Firm of GRP Advisor Alliance</b> peete.com	Overland Park, KS	1980	\$300,000,000	195	5,000
<b>MAGIS Financial Partners</b> magis.pro	Horsham, PA	1976	\$300,000,000	140	2,000
<b>Mary Anne Forrester of Janney Montgomery Scott LLC</b> advisor.janney.com/maryanneforrester	Washington, DC	2001	\$300,000,000	27	4,000
<b>Pensionmark Financial Group</b> pensionmark.com	Garden Ridge, TX	2010	\$300,000,000	120	20,000
<b>Retirement Plan Fiduciaries</b> rpftx.com	Austin, TX	2012	\$300,000,000	55	7,000
<b>CG Financial</b> mycgfinancial.com	Haslett, MI	1999	\$290,000,000	111	10000
<b>Decker Retirement Consulting Group at RBC Wealth Management</b> rbcwmfa.com/john.decker	Glastonbury, CT	1858 (RBC Wealth Management formally in 2008)	\$289,043,280	32	10,000
<b>Oakeson Steiner Wealth &amp; Retirement</b> oakesonsteiner.com	Hastings, NE	1994	\$283,026,122	56	3,320
<b>Acropolis Investment Management, LLC</b> acrinvm.com	St. Louis, MO	2002	\$282,000,000	32	3,800
<b>Morgan Stanley</b> fa.morganstanley.com/thetrcgroup	New York, NY	N/A	\$279,959,149	89	5,000
<b>Bonheur Scott Traino Group at Morgan Stanley</b> morganstanleyfa.com/bstgroup	Middleton, MA	1999	\$360,000,000	97	10,000

Advisor Team	Location	Year Est.	Total DC Plan Assets 12/31/16	Total DC Plans 12/31/16	Total DC Participants 12/31/16
<b>Financial Management Network</b> fmncc.com	Mission Viejo, CA	1993	\$266,028,000	134	7,500
<b>McLaughlin Asset Management</b> mclaughlinassetmgmt.com	Haddonfield, NJ	1990	\$265,000,000	33	2,500
<b>The Okby Group at Morgan Stanley</b> morganstanleyfa.com/theokbygroup	Saratoga Springs, NY	1997	\$259,300,000	25	8,400
<b>The E.W.S. Group at Morgan Stanley</b> morganstanleyfa.com/theewsgroup	Rochester, NY	2003	\$254,000,000	25	5,725
<b>Trust Company of Illinois / TC Wealth Partners</b> tcwealthpartners.com	Downers Grove, IL	1993	\$245,000,000	85	3,500
<b>Tsukazaki &amp; Associates, LLC</b> tsukazaki-associates.com	Honolulu, HI	2004	\$236,000,000	86	4,900
<b>ABG Consultants</b> consultabg.com	Salt Lake City, UT	2004	\$213,000,000	99	4,427
<b>Retirement Advisors, LLC</b> retirementadvisorsllc.com	Dallas, TX	2008	\$208,390,389	22	5,378
<b>Centinel Financial Group</b> centinelfinancialgroup.com	Needham, MA	1967	\$200,000,000	50	5,000
<b>Financial Technology, Inc.</b> financialtec.com	East Lansing, MI	1980	\$200,000,000	70	1,200
<b>QP Consulting LLC</b> qp-consulting.com	Takoma Park, MD	2002	\$200,000,000	36	2,346
<b>Tutton Financial</b> pensionmark.com	Santa Ana, CA	2008	\$200,000,000	120	10,000+
<b>www.arcwoodfinancial.com</b> arcwoodfinancial.com	Phoenix, AZ	2002	\$200,000,000	75	15,000
<b>ML&amp;R Wealth Management LLC</b> mlrwm.com	Austin, TX	1997	\$197,390,624	36	2,740.00
<b>Morgan Stanley</b> fa.morganstanleyindividual.com/theswansonjohn- songroup	Portland, OR	2004	\$193,000,000	44	2,629
<b>Blueprint Financial</b> blueprint1.net	Cleveland, OH	2007	\$185,000,000	23	3,800
<b>Eidlin-Kilmer &amp; Associates</b> fa.ml.com/new-york/pittsford/eidlin_kilmer	Pittsford , NY	1992	\$183,623,735	57	1,750
<b>Manhattan Ridge Advisors</b> manhattanridge.com	New York, NY	2006	\$180,000,000	48	1,750
<b>Aurum Wealth Management Group</b> aurumwealth.com	Mayfield Village, OH	1996	\$175,000,000	50	3,800
<b>Connor &amp; Gallagher OneSource, Member Firm of GRP Advisor Alliance</b> gocgo.com/employer-sponsored- retirement-programs	Lisle, IL	1997	\$175,000,000	30	9,000
<b>Sharkeym Howes &amp; Javer, Inc.</b> SHWJ.com	Denver , CO	1990	\$170,000,000	51	2,100

<b>Advisor Team</b>	<b>Location</b>	<b>Year Est.</b>	<b>Total DC Plan Assets 12/31/16</b>	<b>Total DC Plans 12/31/16</b>	<b>Total DC Participants 12/31/16</b>
<b>The Fowler Group of Raymond James</b> fowlerwealthmanagement.com	Nashville, TN	2002	\$168,000,000	27	3,650
<b>Pensionmark Financial Group</b> pensionmark.com	Bakersfield, CA	2007	\$165,000,000	72	5,200
<b>Bishop Wealth Management Group</b> bishopwealthmanagementgroup.com	Pittsburgh, PA	1984	\$164,000,000	50	1,700
<b>Mid-Atlantic Planning Services</b> midatlanticplanning.com	Allentown, PA	2006	\$160,000,000	70	3,000
<b>Stonebridge Financial Group</b> stonebridgefg.com	Wormleysburg, PA	2002	\$155,000,000	65	2,200
<b>N W Kaye Private Investment Management, LLC</b> nwkayepim.com	New Orleans, LA	2015	\$152,000,000	3	2,550
<b>Grinkmeyer Leonard Financial</b> grinkmeyerleonard.com	Birmingham, AL	2005	\$150,000,000	26	3,100
<b>Jbara and Rogers Financial Management Group</b> fa.morganstanley.com/jbaraandrogers	Farmington Hills, MI	1985	\$150,000,000	21	1,300
<b>Fisher Investments 401(k) Solutions</b> fisher401k.com	Camas, WA	2014	\$141,322,314	74	2,314
<b>L.R. Webber Associates, Inc.</b> lrwebber.com	Duncansville, PA	1976	\$140,000,000	20	6,500
<b>Kirby Wealth Management Group</b> justin-kirby.com	Champaign, IL	1995	\$125,000,000	61	3,000
<b>Prosperifi, LLC</b> prosperifi.com	Rosemont, IL	2015	\$125,000,000	60	1,200
<b>Twelve Points Retirement Advisors</b> twelvepointsretirement.com	Boston, MA	2014	\$123,683,942	41	2,460
<b>S C Asset Advisors of Janney Montgomery Scott LLC</b> scassetadvisorsjanney.com	Columbia , SC	1997	\$122,000,000	33	2,200
<b>Beltz Ianni &amp; Associates, LLC</b> beltz-ianni.com	Rochester, NY	2001	\$120,315,750	68	2,226
<b>Horizon Wealth Management</b> horizonfg.com	Baton Rouge, LA	1999	\$120,000,000	60	2,300
<b>Zak Wealth Management Group of Wells Fargo Advisors</b> zakwmg.com	Greenville, DE	1992	\$120,000,000	15	560
<b>The Burns/Marchiano Group at Morgan Stanley</b> morganstanley.com/fa/burnsmarchiano	Morristown, NJ	N/A	\$130,000,000	64	2,000
<b>Investors Brokerage of Texas, Ltd.</b> investorsbrokerage.com	Waco, TX	1982	\$102,000,000	42	2,100