

LARGEST INVESTMENT ADVISERS

RANKED BY ASSETS UNDER MANAGEMENT LOCALLY⁽¹⁾

Rank	Company Address Phone/Web site	Total assets under management locally (millions)		% change	Total number of local accounts	Minimum individual account (thousands)	Portfolio analysts on staff	Compensation for services	Chief investment officer	Top local executive
		Dec. 31, 2010	Dec. 31, 2009							
1	Glenmede Trust Co. 25825 Science Park Drive, Suite 110, Beachwood 44122-7315 (216) 378-2900/www.glenmede.com	\$2,493.8	\$2,255.7	10.6%	1,788	\$3,000.0	6	Fee based on assets under management and strategies employed	Gordon B. Fowler Jr.	Frank I. Harding, III managing director, director of the Ohio office
2	Lincoln Financial Advisors/Sagemark Consulting 28601 Chagrin Blvd., Suite 300, Cleveland 44122 (216) 765-7400/www.lfa-sagemark.com	\$2,059.3	\$1,927.7	6.8%	4,218	NA	NA	Fee and commission	Tim Johnson Ben Huddle	John DiMonda managing director
3	Paragon Advisors Inc. 20820 Chagrin Blvd., Shaker Heights 44122 (216) 491-3990/www.paragonadvisors.net	\$2,000.0	\$2,500.0	-20.0%	30	\$15,000.0	10	Fee only	Terence C. Sullivan	NA
4	Stratos Wealth Partners 30575 Bainbridge Road, Suite 100, Solon 44139 (866) 553-9882/www.stratoswealthpartners.com	\$1,840.0	\$1,100.0	67.3%	22,354	\$1.0	3	Fee, commission, % of assets under management	Daniel Jacoby	Jeffrey Concepcion CEO
5	MAI Wealth Advisors LLC 1360 E. Ninth St., Suite 1100, Cleveland 44114 (216) 920-4800/www.maiwealth.com	\$1,647.0	\$1,321.5	24.6%	464	\$500.0	11	Fee only based on assets under management or set fee for non-investment services	Gerald H. Gray	Richard J. Buoncore managing partner
6	Cedar Brook Financial Partners 5885 Landerbrook Drive, Suite 200, Cleveland 44124 (440) 683-9200/www.cedarbrookfinancial.com	\$1,540.0	\$1,420.0	8.5%	NA	\$0.0	5	Negotiated	Randy Schneider Peter Franz	Azim Nakhooda managing principal
7	Rehmann Financial 1340 Depot St., Suite 205, Rocky River 44116 (440) 356-4520/www.rehmannfinancial.com	\$1,450.0	\$675.0	114.8%	4,200	\$250.0	6	Fee or commission	Jeffrey Phillips	Joseph P. Heider managing principal
8	CBIZ Financial Solutions, Inc. dba CBIZ Retirement Plan Services 6050 Oak Tree Blvd. S., Suite 500, Independence 44131 (216) 447-9000/www.cbiz.com	\$1,207.4	\$1,049.9	15.0%	141	\$1,000.0	NA	Fee, commission and percentage of assets under management	Brian Dean	Luke F. Baum president
9	NCA Financial Planners 6095 Parkland Blvd., Suite 210, Cleveland 44124 (440) 473-1115/www.ncafinancial.com	\$965.3	\$822.6	17.3%	2,500	\$250.0	14	Percentage	Dennis P. Lehman	Kevin H. Myeroff president, CEO
10	CM Wealth Advisors Inc. 30195 Chagrin Blvd., Suite 250, Pepper Pike 44124 (216) 831-9667/www.cmwealthadvisors.com	\$936.0	\$784.1	19.4%	72	\$2,000.0	NA	Percentage of assets under management, fixed fees	James W. Wert	James W. Wert president, CEO
11	Fairway Wealth Management LLC 6393 Oak Tree Blvd., Suite 108, Independence 44131-6958 (216) 573-7200/www.fairwaywealth.com	\$624.7	\$575.0	8.6%	100	\$2,000.0	4	Fee only, based on assets and/or scope of services	Mark S. Weiskind	Daniel R. Gaugler CEO, managing director
12	Beacon Financial Partners LLC 25800 Science Park, Suite 200, Beachwood 44122 (216) 910-1850/www.beaconplanners.com	\$503.0	\$420.0	19.8%	2,127	NA	1	Fee and commission	Dale Rubin	Gregory G. Randall managing partner
13	Sequoia Financial Group LLC 121 S. Main St., Suite 300, Akron 44314 (330) 375-9480/www.sequoia-financial.com	\$437.6	\$291.8	50.0%	1,500	\$0.0	2	Percentage of assets under management, fee and commission	Thomas A. Haught	Thomas A. Haught president
14	MGO Investment Advisors Inc. 1301 E. Ninth St., Suite 1400, Cleveland 44114 (216) 771-4242/www.mgo-inc.com	\$408.3	\$341.5	19.6%	1,920	\$15.0	3	Percentage of assets under management	Michael Bradford Moskal	Michael Moskal president
15	Inverness Holdings LLC One Chagrin Highlands, Suite 440, Beachwood 44122 (216) 839-5130/www.invernesswealth.com	\$400.0	\$350.0	14.3%	300	\$750.0	10	Fee and commission	Jeffrey van Fossen	Richard B. Renner principal
16	Cornerstone Capital Advisors 1507 Boettler Road, Suite G, Uniontown 44685 (330) 896-6250/www.ccadvisors.com	\$322.6	\$264.3	22.1%	930	\$100.0	2	Fee only	Mario C. Giganti	Mark W. Fearigo principal, trusted advisor
17	McDonald Partners LLC 959 W. Saint Clair Ave., Suite 300, Cleveland 44113 (216) 912-0567/www.tmpfa.com	\$282.1	\$110.2	156.0%	943	NA	2	Fee and commission	William Hegarty	Thomas McDonald president, CEO
18	Scott Snow (financial advisors) LLC 24601 Center Ridge Road, Suite 175, Westlake 44145 (440) 871-7669/www.s2fa.com	\$233.0	\$210.0	11.0%	55	\$1,000.0	2	Fee only	Scott P. Snow	Scott P. Snow managing director
19	Aurum Wealth Management Group LLC 6685 Beta Drive, Mayfield Village 44143 (440) 605-1900/www.aurumwealth.com	\$158.0	\$140.0	12.9%	86	\$1,000.0	1	Fee only	NA	Christopher D. Bart, Eric N. Wulff, managing directors, principals

Source: Information is supplied by the companies unless footnoted. Crain's Cleveland Business does not independently verify the information and there is no guarantee these listings are complete or accurate. We welcome all responses to our lists and will include omitted information or clarifications in coming issues. Individual lists and The Book of Lists are available to purchase at www.crainscleveland.com.

(1) Companies that are registered with the SEC as investment advisers but do not have full control over where their clients' money is invested are included in the Investment Advisers list. This criteria is in keeping with the standard used by our sister publication, Pensions & Investments.