

BARRON'S

MonetaSM Ranked No. 4 in the Nation Among Independent Registered Investment Advisors

SEPTEMBER 2018—In their ranking decision, Barron's weighs "dozens of qualitative and quantitative components, including assets managed, the size and experience of teams and the regulatory records of the advisors and firms."

This year, the ranking expanded from a top 30 list in 2017, to a top 40 list in 2018 to make room for the explosive growth of firms. As the list of contenders gets longer, Moneta continues to rise to the top, ranked #7 in 2017 and up to #4 in 2018.

"We do not consider ourselves 'Aggregators' of other Registered Investment Advisors (RIAs)," says Eric Kittner, Managing Partner of Moneta. "We believe we are growing because our turn-key business management platform, proven paths to succession planning and a strong, trusted Midwest work ethic are an exceptional value to our clients. We are a 'client first' organization and it shows."

Rank '18	Rank '17	Firm	Location	Top Executives	Clients	Advisors	Offices	States
1	3	Edelman Financial Service	Fairfax, VA.	Ryan Parker, RicEdelman	37,351	163	43	16
2	4	United Capital Financial Advisors	Newport Beach, CA	Joe Duran, Edward Kummer, Gary Roth	21,021	221	85	29
3	2	Mariner Wealth Advisor	Overland Park, KS	Marty Bicknell, Cheryl Bicknell, Katrina Scott	14,890	205	25	18
4	7	Moneta Group Investment Advisors	Clayton, MO	Eric Kittner, Keith Bowles, Nathan Howard	4,395	95	2	1
5	5	Silvercrest Asset Mgmt Group	New York	Richar Hough III, David Campbell, Scott Gerard	722	27	7	4