

KANSAS CITY  
BUSINESS JOURNAL

# BOOK OF LISTS

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# KANSAS CITY BUSINESS JOURNAL

# TOP AREA FEE-BASED INVESTMENT ADVISERS

RANKED BY ASSETS UNDER MANAGEMENT

|    | Name / Prior rank (*unranked previously)<br>Website                          | Address,<br>Phone  | Local assets under management 2015 | Accounts managed locally | Year founded locally | Headquarters      | Top local executive(s)   |
|----|--|--|------------------------------------|--------------------------|----------------------|-------------------|--|
| 1  | <b>Creative Planning</b> ①<br>thinkingbeyond.com                             | 3400 College Blvd.,<br>Leawood, KS 66211<br>913-338-2727                       | \$16.09<br>billion                 | 11,478                   | 1983                 | Leawood           | Peter Mallouk, CEO   |
| 2  | <b>Mariner Wealth Advisors LLC</b> ③<br>marinerwealthadvisors.com            | 4200 W. 115th St.,<br>#100,<br>Leawood, KS 66211<br>913-647-9700               | \$14<br>billion                    | NA                       | 2006                 | Leawood           | Martin Bicknell, CEO   |
| 3  | <b>Kornitzer Capital Management Inc.</b> ②<br>kornitzercapitalmanagement.com | 5420 W. 61st Pl.,<br>Mission, KS 66205<br>913-677-7778                         | \$8.16<br>billion                  | 4,800                    | 1989                 | Mission           | Barry Koster, CFO<br>John Kornitzer, CEO   |
| 4  | <b>FCI Advisors</b> ⑤<br>fciadvisors.com                                     | 442 W. 47th St.,<br>Kansas City, MO 64112<br>816-329-1500                      | \$6.25<br>billion                  | 9,953                    | 1966                 | Kansas City       | William Koetler, CEO   |
| 5  | <b>Prairie Capital Management LLC</b> ⑥<br>prairiecapital.com                | 4900 Main St.,<br>#700,<br>Kansas City, MO 64112<br>816-531-1101               | \$3.56<br>billion                  | 235                      | 1995                 | Kansas City       | Andrew Klocke<br>Brian Kaufman<br>Curtis Krizek<br>Michael Gentry, Managing directors                        |
| 6  | <b>Vantage Investment Partners LLC</b> ⑩<br>vantageinvestmentpartners.com    | 4900 Main St.,<br>#310,<br>Kansas City, MO 64112<br>816-569-1373               | \$3.53<br>billion                  | 394                      | 2003                 | Kansas City       | John Woolway, President & co-founder   |
| 7  | <b>Bukaty Cos. Financial Services</b> ⑧<br>bukaty.com                        | 11221 Roe Ave.,<br>#200,<br>Leawood, KS 66211<br>913-338-5300                  | \$2.72<br>billion                  | 639                      | 2001                 | Leawood           | Vincent Morris, President  |
| 8  | <b>Lawing Financial</b> ⑦<br>lawingfinancial.com                             | 6201 College Blvd.,<br>#700,<br>Overland Park, KS 66211<br>913-491-6226        | \$2.43<br>billion                  | 2,078                    | 1985                 | Overland Park     | Kerry Lawing, CEO  |
| 9  | <b>CBIZ Retirement Plan Services</b> ⑨<br>retirement.cbiz.com                | 700 W. 47th St.,<br>#1100,<br>Kansas City, KS 64112<br>866-560-2431            | \$2.25<br>billion                  | 102                      | NA                   | Cleveland         | Robert Fischgrund, Executive VP<br>Jack Keller, VP   |
| 10 | <b>HighPointe Financial Group</b><br>highpointefinancial.com                 | 9401 Indian Creek<br>Pkwy., #450<br>Overland Park, KS<br>66210<br>913-234-0300 | \$1.5<br>billion                   | 22,796                   | 1888                 | Overland Park     | Mark Rodden,<br>CEO  |
| 11 | <b>Meritage Portfolio Management Inc.</b> ⑪<br>meritageportfolio.com         | 7500 College Blvd.,<br>#1212,<br>Overland Park, KS 66210<br>913-345-7000       | \$1.45<br>billion                  | 1,149                    | 1991                 | Overland Park     | Mark Eveans, President<br>James Klein, Senior portfolio manager  |
| 12 | <b>Waddell &amp; Reed Financial Inc.</b> *<br>waddell.com                    | 6300 Lamar Ave.,<br>Overland Park, KS 66202<br>913-236-2000                    | \$1.22<br>billion                  | 23,399                   | 1937                 | Overland Park     | Henry Herrmann, Chairman   |
| 13 | <b>Alliance Benefit Group of Kansas City Inc.</b> *<br>abgfs.com             | 13401 Mission Rd.,<br>#201,<br>Leawood, KS 66209<br>913-214-3700               | \$950<br>million                   | 40                       | 1998                 | Albert Lea, Minn. |  |
| 13 | <b>Financial Advisory Service Inc.</b> ⑬<br>faskc.com                        | 4747 W. 135th St.,<br>Leawood, KS 66224<br>913-239-2300                        | \$950<br>million                   | NA                       | 1979                 | Leawood           | Max Greer, President   |
| 15 | <b>BKD Wealth Advisors</b> ○<br>bkdwa.com                                    | 1201 Walnut,<br>#1700,<br>Kansas City, MO 64106<br>816-842-1935                | \$725<br>million                   | 320                      | 1998                 | Springfield       |  |
| 16 | <b>Dean Capital Management</b> ⑯<br>deancapgmt.com                           | 7450 W. 130th St.,<br>#150,<br>Overland Park, KS 66213<br>913-944-4444         | \$656<br>million                   | NA                       | 2008                 | Overland Park     | Patrick Krumm, Director of institutional sales<br>Douglas Leach, Portfolio manager, chief compliance officer |
| 17 | <b>Mitchell Capital Management Co.</b> ⑰<br>mitchcap.com                     | 11460 Tomahawk Creek Pkwy.,<br>#410,<br>Leawood, KS 66211<br>800-486-6468      | \$620<br>million                   | 205                      | 1987                 | Leawood           | Kenneth Green, President   |
| 18 | <b>Atwood &amp; Palmer Inc.</b> ⑱<br>atwoodpalmer.com                        | 4520 Madison Ave.,<br>#200,<br>Kansas City, MO 64111<br>816-931-2266           | \$608.34<br>million                | 158                      | 1990                 | Kansas City       | Steven Palmer, President   |
| 19 | <b>Two West Capital Advisors LLC</b> ⑲<br>twowestadvisors.com                | 4551 W. 107th St.,<br>3rd Fl.,<br>Overland Park, KS 66207<br>913-825-1722      | \$576.5<br>million                 | 183                      | 2010                 | Overland Park     | Marko Ungashick, CEO   |
| 20 | <b>Paragon Capital Management LLC</b> ⑳<br>paragoncap.com                    | 9200 Indian Creek Pkwy.,<br>#230,<br>Overland Park, KS 66210<br>913-451-2254   | \$465<br>million                   | 335                      | 1998                 | Overland Park     | Craig Novorr, President<br>Howard Jacobson, Principal<br>Ward Williams, Principal                            |
| 21 | <b>Wealth Management Advisors Inc.</b> ㉑<br>wealthmgt.com                    | 4000 W. 114th St.,<br>#160,<br>Leawood, KS 66211<br>913-661-1650               | \$464.26<br>million                | 364                      | 1993                 | Leawood           | Kevin McGrew, President<br>Paul Watkins, Chief compliance officer  |
| 22 | <b>Sunrise Advisors</b> *<br>sunriseadvisors.com                             | 3710 W. 135th St.,<br>Leawood, KS 66224<br>913-681-0215                        | \$425<br>million                   | 386                      | 1993                 | Leawood           | Samuel Scott, President<br>David Scott, Chairman   |
| 23 | <b>Kavar Capital Partners LLC</b> *<br>kavarcapital.com                      | 11460 Tomahawk Creek Pkwy.,<br>#420,<br>Leawood, KS 66211<br>913-428-3300      | \$415<br>million                   | NA                       | 2011                 | Leawood           | Douglas Ciocca, CEO<br>Tom Boling, EVP   |
| 24 | <b>Buttonwood Financial Group LLC</b> *<br>buttonwoodfg.com                  | 3013 Main St.,<br>Kansas City, MO 64108<br>816-285-9000                        | \$365<br>million                   | 280                      | 2002                 | Kansas City       | Jon McGraw, President  |
| 25 | <b>Cognios Capital</b> *<br>cognios.com                                      | 11250 Tomahawk Creek Pkwy.,<br>Leawood, KS 66211<br>913-214-5000               | \$326.05<br>million                | 154                      | 2008                 | Leawood           | John Brandmeyer, CEO<br>Steven Braun, CFO<br>Jonathan Angrist, President & chief                             |