

Top 10 Best Financial Advisors in Boston, MA | 2017 Ranking | Boston Area Wealth Management Firms

2017 RANKING & REVIEWS TOP RANKING BEST FINANCIAL ADVISORS IN BOSTON, MASSACHUSETTS

Finding the Top Financial Advisors in Boston, Massachusetts

Finding the right Boston wealth management firm, financial advisor, or financial planner is no easy task.

A metropolitan area like Boston, with its rich history in commerce, makes it a prime destination for financial advisors and investment management firms.

It doesn't matter what your specific financial goals are - a round-the-world trip, retirement savings, or funding a child's education - it helps to have a plan. Working with a financial advisor in Boston can guarantee that your money is working while you do, and that you can create a plan to live comfortably in retirement. A professional can also help you avoid being hit by astronomical taxes while you grow your wealth.



Award Emblem: Top 10 Best Financial Advisors in Boston, MA

AdvisoryHQ's List of the Top 10 Best Financial Advisors in Boston, MA

List is sorted alphabetically (click any of the names below to go directly to the detailed review section for that advisor)

- [**Birch Hill**](#)
- [**Boston Financial Management**](#)
- [**Boston Private Wealth**](#)
- [**Choate Investment Advisors**](#)
- [**Compass Planning Associates**](#)
- [**Congress Wealth Management**](#)
- [**Fiduciary Trust Company**](#)
- [**Lexington Wealth Management**](#)
- [**Modera Wealth Management**](#)

- [North American Management](#)

Top 10 Best Financial Advisors in Boston, Massachusetts | Brief Comparison

Top Wealth Management Firms in Boston	Highlighted Features
Birch Hill	Multigenerational clients
Boston Financial Management	BFM ResourceMap
Boston Private Wealth	Comprehensive Wealth Management
Choate Investment Advisor	SRI Investing
Compass Planning Associates	Financial Advice for Businesses
Congress Wealth Management	Core and Satellite Approach
Fiduciary Trust Company	Integrated Wealth Management Services
Lexington Wealth Management	Adoption of new technologies
Modera Wealth Management	Responsive financial planning process
North American Management	Comprehensive Resources

Table: Top 10 Best Financial Advisors in Boston | Above list is sorted alphabetically

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services, and products that are ranked on its various top rated lists?

Please click here “[AdvisoryHQ's Ranking Methodologies](#)” for a detailed review of AdvisoryHQ’s selection methodologies for ranking top rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Top Ranking Best Wealth Management Firms in Boston, Massachusetts

Below, please find the detailed review of each firm on our list of the best wealth management firms in Boston. We have highlighted some of the factors that allowed these financial advisors in Boston to score so high in our selection ranking.

See Also: [Best Financial Advisors in D.C., Maryland, & Virginia \(Tri-State\) | Ranking | D.C., MD & VA Wealth Managers](#)

Birch Hill Investment Advisors LLC Review

[Birch Hill Investment Advisors LLC](#) is a Boston wealth management firm founded in 2007. Despite only being in business for ten years, the firm is supported by a team of Principals who collectively bring more than 100 years to the table. Birch Hill’s primary focus is on individuals and families, but they also advise endowments, trusts, institutions, and foundations.

The firm is an SEC Registered Investment Advisor (RIA) that acts as a fiduciary to its clients, providing them with independent, unbiased advice and investment services on a fee-only basis.



Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Boston

Independence, Transparency, and Accountability

Birch Hill is an independent, [Registered Investment Advisor in Boston](#) that is completely owned by its Principals. This leaves this Boston wealth management firm free to put your best interests at the heart of what they do. They also work with an independent custodian who ensures that Birch Hill operates with complete transparency and accountability on all client portfolios.

Frequent Charitable Contributions

Birch Hill frequently gives back to its community in the form of [charitable contributions](#). But they don't stop at the greater Boston area. Instead, this Boston wealth management firm reaches out to charities throughout New England all the way to Maine. Some of the charity types to which they've donated include organizations that assist the homeless, help at-risk youth, and provide shelter and counseling to victims of domestic violence.

Generations of Trust

The Principals who founded Birch Hill have over 100 years of combined experience in financial planning and wealth management. This makes the Principals of Birch Hill one of the most experienced team of financial advisors in Boston, Massachusetts.

Perhaps more impressive, however, is the fact that some of Birch Hill's client families have been entrusting the Principals with their family wealth over successive generations. This speaks to the trust and stability that this Boston financial advisory firm has built with their client base through their 3 decades-plus of financial planning.

The Name Reflects Their Values

Birch Hill derives its name from a [small parcel of New England real estate owned by a Birch Hill client family](#).

Important to note is that this family has been entrusting Birch Hill with their financial advice and wealth management for quite a long time. Not only that, but the Principals of Birch Hill were inspired so much by this family's values, work ethic, and dedication that they named the firm in their honor.

The Birch Hill name has gone on to reflect the same core principles shared by many other Birch Hill clients since the firm's inception in 2007.

Focused on Your Long-Term Needs

As a fiduciary wealth management firm in Boston, Birch Hill is dedicated to each individual client's bottom line. These financial advisors in Boston [operate as fiduciaries](#), which means they are legally obligated to put their clients' interests and objectives first.

What's more, Birch Hill approaches each portfolio with a long-term view. The advisors on the Birch Hill team want to see you grow your portfolio through trusted, fundamentally sound principles that square with your risk tolerance. They prioritize long term value and stability over short-term, unsustainable gains.

Boston Financial Management Review

[Boston Financial Management](#) is a financial advisor in Boston that has grown since its founding four decades ago. This Boston wealth management firm's team of financial experts specialize in helping individuals and families achieve their investment goals. Their mission is to provide exceptional client satisfaction that results in continued business across generations.

Boston Financial Management is a fee-based wealth management firm in Boston, but we have included them on this list for the valuable services that they provide.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Boston

Accountable to Your Unique Needs

At Boston Financial, they define success as helping each individual client achieve their goals. No pushing unnecessary products or services onto the client because of quotas, commissions, or bragging rights. Client needs differ across the spectrum, and this wealth management firm in Boston will not shoehorn you into any preset or model. This guarantees you personal, customized attention.

BFM ResourceMap™

To aid in their financial planning service, Boston Financial developed a proprietary tool known as the [BFM ResourceMap™](#).

The ResourceMap™ helps BFM show the “big picture” of your financial future. Their Boston financial advisors start by evaluating your financial posture and comparing it to your goals.

Then, using the ResourceMap™, BFM advisors can prepare a clear, intuitive roadmap illustrating the steps necessary to reach your objectives. To accomplish this, the ResourceMap™ tackles a wide range of concerns, including:

- Confirming cash flow
- Identifying risk tolerance

- Clarifying existing and anticipated financial needs
- Evaluating possible consequences of your chosen investment plans
- Establishing guidelines for asset allocation
- Tax-efficiency
- Philanthropic goals
- Smooth and optimized transfer of wealth

Experience Combined with In-House Mentoring

Boston Financial Management is a Boston financial advisor that's been up and running for 40 years. Many of the advisors at BFM have been with the company for a considerable length of time. Newer members of the team have joined BFM from backgrounds at premier wealth management firms that honed and developed their expertise and skill sets.

But BFM is not a typical wealth manager in Boston that always seeks new help from the outside. Instead, this Boston wealth management firm has developed an in-house mentoring model that trains up existing team members. These internal candidates learn the ins and outs of BFM's processes and approach, qualifying them to one day step into a larger role.

In this way, BFM ensures that it has dedicated, professionally-trained advisors who are more than capable of carrying on the Boston Financial Management name.

Conflict-Free, Fiduciary, and Employee-Owned

Boston Financial Management eliminates conflict of interest from their operational philosophy, by operating [without accepting commission](#). With Boston Financial Management, you never have to worry about being pressured into purchasing unneeded services or products.

BFM operates under a [fee based system](#) based on AUM (assets under management). These fees are spelled out upfront to each client to avoid the appearance of hidden charges later on.

Furthermore, Boston Financial Management employees are only compensated when you are happy with your portfolio's performance.

Emphasize Quality in All Investments

Since their inception, Boston Financial has eschewed all other investments in favor of a top-down, quality-first asset selection. To make sure you are

investing in only the highest quality assets, this Boston wealth management firm employs a number of qualifying criteria, research, and analysis to weed out lesser investment opportunities.

Taking this approach allows Boston Financial Management to minimize your risk. In addition, their emphasis on quality increases the chance that your portfolio will experience regular, more productive returns compared to other investments.

Little Client Turnover and Generational Trust

Staying true to focus on your long-term needs, BFM seeks a high level of client satisfaction. By keeping you highly satisfied, these Boston financial advisors aim to earn not only your trust but the trust of your children, spouse, partner, and other members of your family. They don't just want a quick, one-and-done relationship. They want to help you even more by helping those you love most.

As a result of this single-minded focus, Boston Financial has enjoyed very low client turnover. The individuals and families working with them know they can trust them. With this top Boston wealth management firm, you gain an ally who's in it with you through the many ups and downs of the market.

Educating Clients

BFM does one better than many other Boston financial planners. Rather than simply advising clients on investment strategies, Boston Financial provides opportunities for clients to educate themselves on a range of pertinent investment topics.

Some examples include holding luncheons with well-known speakers both from within and outside of the wealth management sphere. BFM will also post helpful, informative articles and commentaries by team members under the

News & Events page on their website.

[Don't Miss: Best Financial Advisors in Oklahoma City & Tulsa, OK | Ranking | Oklahoma City & Tulsa Wealth Managers](#)

Boston Private Wealth Review

[Boston Private Wealth](#) is a Registered Investment Advisor in Boston that serves affluent individuals, family businesses, entrepreneurs, business owners, professionals, nonprofits, and private partnerships.

Boston Private Wealth has dedicated itself to becoming one of the elite financial planning and wealth management firms in the country. This Boston wealth management firm operates under the umbrella of Boston Private Bank & Trust. Their [Boston Private](#) and [Boston Private Wealth](#) websites recently consolidated into one site.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Boston

Large Firm with Low Client-Advisor Ratios

Boston Private Wealth is a large firm. In fact, it's one of the largest wealth managers in Boston. For this reason, Boston Private is able to service a larger number of clients compared to other Boston financial planners.

However, Boston Private's size does not mean your financial advisor will treat you like a number. They are structured to keep their client-to-advisor numbers low and manageable. This gives you peace of mind knowing that Boston Private will always be there to meet with you and hear your concerns.

Experienced and Credentialed

Another great factor that we liked about Boston Private Wealth is their rich experience.

These Boston financial planners have extensive backgrounds in a range of assets such as fixed incomes, international equities, and domestic equities. This plus their years of experience makes Boston Private one of the most experienced Boston wealth management firms.

As a Registered Investment Advisor in Boston, they boast several professional credentials. Included among these are:

- Certified Financial Planner
- Chartered Financial Analyst
- Master of Business Administration
- Certified Investment Management Analyst

- Juris Doctor

Keeping Communication Open

Boston Private does not simply take your money, invest it, and send out your quarterly report. Their financial advisors in Boston contact you regularly to help analyze your investment performance and recommend changes or ways to enhance your portfolio.

This Boston financial advisory firm also seeks to educate clients through various means. One way they do this is their quarterly newsletter, *Economic & Market Perspective*. They make available exclusive informational client events, such as seminars and webcasts.

Utilizing External Resources

Boston Private Wealth builds client portfolios in two ways: 1) By utilizing in-house managers and strategies, and 2) by utilizing external managers that complement Boston Private's investment approach. In this way, this Boston wealth management firm maximizes your investments across asset classes, minimizes your risk, and pairs you with experts within specialized investment areas.

They are not content to select just any external manager, however. Boston Private performs due diligence by putting all external managers through rigorous analysis. You can rest assured [that Boston Private has vetted these managers](#), guaranteeing that they are working solely in your best interests.

A Range of Services

Boston Private Wealth can help you with a variety of financial and investment concerns. In addition to consulting with you on investment management strategies, these Boston financial planners also provide wealth management services. Included within these wealth management services is estate planning, insurance consultation, and planning for business succession.

This wealth management firm in Boston offers services to high net-worth individuals and families seeking to streamline generational wealth transfer. In addition, Boston Private Wealth can help with tax-efficiency, bill pay management, cash flow and budgeting, among other services.

Choate Investment Advisors Review

[Choate Investment Advisors](#) is a wealth management advisory firm in Boston. They specialize in what they call “[SRI investments](#)”, which stands for Sustainable, Responsible, and Impact investing.

SRI is a unique, socially responsible strategy that provides ethical and socially progressive guidelines for advising clients on planning and wealth management. This includes strict criteria for eliminating certain companies that do not match Choate Investment’s ideals.

Choate Investment Advisors [is a subsidiary](#) of Choate Hall & Stewart, a law firm based in Boston, Massachusetts.

It is unclear whether Choate is a fee-only wealth management firm in Boston. While there is some past news coverage referring to them as a fee-only firm, there is no reference to being “fee-only” on their website or in recent news coverage.

We have included them on our list because of the range of services they provide and their focus on socially conscious investing. That said, we advise clients to verify their fee structure during their consultation.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Boston

Awards and Recognition

Choate Investment Advisor is a financial planner in Boston that has received several acclaimed industry rankings over the past year.

Choate Investment has been named to *Forbes* Magazine’s list of Top 100 Wealth Managers for 2015. It has also made the list for *Financial Times*’s “300 Top Registered Investment Advisors” in 2015.

In addition, Choate’s managing director, Todd Millay, was included on *Barron’s* 2013 list of “America’s Top 100 Independent Financial Advisors.” He also received *Financial Planning* magazine’s Influencer Award in 2011 in recognition of his innovation within the financial planning industry.

Unique, Socially Responsible Approach

Choate Investment Advisor is unique among Boston financial advisors for their [socially responsible approach](#). This investment strategy has also been called socially conscious investing, or environmental, social, and governance investing, among other designations.

The crux of this Boston wealth management firm's approach focuses on long-term, sustainable investments that consciously and positively impact society. They target client investments toward socially responsible arenas, including issues of diversity and clean energy, among others.

They also highlight companies that issue “Green Bonds,” which are bonds whose proceeds are earmarked for positive environmental impact.

Going further to that end, Choate excludes assets when companies manufacture such things as:

- Tobacco
- Alcohol
- Firearms and other weapons
- Nuclear power
- Gambling

When it comes to affecting the marketplace, Choate also takes an activist role. They dialogue with companies to influence them toward more socially conscious decision-making. They also strive to invest in both private and underserved markets.

A Focus on Community Impact Investing

Choate Investment Advisors focus on investments in companies that give back to their communities in specific ways. Particular areas of concern include child care, education, job creation, and companies with a good environmental track record. In this way, this top Boston wealth management firm helps clients positively influence their communities while growing their portfolios.

Some companies Choate continues to recommend for client portfolios include RSF Social Investment Fund, Boston Community Capital, Root Capital, and Calvert Foundation Community Investment Note.

Involvement in the Community

Choate Investment does more than merely suggest socially conscious investment opportunities to their clients. Instead, they are one of the best financial advisors in Boston because they actively participate in community outreach.

Some examples of community organizations Choate supports [include](#):

- Political Asylum Immigration Project (PAIR), which assists detainees and those seeking asylum from African countries
- Charles Hamilton Houston Initiative for Race & Justice at Harvard Law School, an organization that encourages at-risk students who struggle with learning disabilities to remain in school and avoid getting involved in crime
- Massachusetts Clean Energy Center, a state organization that advances clean energy initiatives for Massachusetts citizens who pay energy rates
- InnerCity Weightlifting, an organization whose goal is to socially and economically mobilize inner-city youth

Independent Structure

While they are a subsidiary of Choate Hall & Stewart, Choate Investment Advisors was built with an [independent structure](#). This means that they do not answer to anyone but themselves when making investment decisions on your behalf. They provide objective, unbiased advice by evaluating all asset managers and looking out for their clients' best interests.

[Related: Best Financial Advisors in Philadelphia, PA | Ranking | Greater Philadelphia Area Wealth Managers](#)

Compass Planning Associates

[Compass Planning Associates](#) is a wealth management firm in Boston and Wellesley Hill. Their team of Boston financial planners offers personalized, one-to-one support to guide clients towards meeting their financial goals.

They value providing an accessible, stress free environment that cultivates open communication with clients.

Compass Planning Associates is an independent, [fee only](#) wealth management firm in Boston.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Boston

Financial Advice for Individuals and Families

Both individuals and families require financial guidance. Individuals may need guidance on how to grow and preserve their wealth, but that financial guidance may also take place within the context of their family's needs. A Boston financial advisor at Compass can help you with life goals like establishing a plan for retirement or saving up funds for your child's college tuition.

This Boston wealth management firm can also help families establish a plan for passing along wealth to ensure their heirs and the family fortune does not get hit with an inordinate amount of taxes or penalty fees.

Financial Advice for Businesses

People don't just require financial guidance in their personal lives - they seek it in their business endeavours as well.

A Boston wealth management firm can help businesses in a number of areas. Business owners sometimes seek guidance about whether it's a good time to buy new equipment and where they can cut costs.

Business owners also look for professional advice when it comes to meeting their obligations as a fiduciary if they offer retirement benefits to their employees. Additionally, business owners themselves need to set up succession plans so that they can live comfortably if they choose to retire.

Compass Planning can help business owners with their portfolio management, including their retirement plans. This wealth management firm in Boston also provides what they call [Compass MoneyWise Seminars](#), which are purely for educational purposes and do not include any product sales.

Jennifer's Compass

Compass Planning's founder, Jennifer Lane, runs a blog called [Jennifer's Compass](#). This blog provides clients and non-clients with a friendly, informative resource about wealth management. Whether someone has a Boston financial advisor or not, they can educate themselves about financial principles by reading the articles on this blog and review tips on how to effectively manage their money.

Congress Wealth Management Review

[Congress Wealth Management](#) is a mid-size, independent wealth management firm in Boston registered with the SEC. They primarily service high net-worth clients and their families, endowments, and foundations. They also partake in a [strategic partnership with Congress Asset Management](#) to maximize the resources available to Congress Wealth clients.

Congress does not explicitly say that they are a "fee-only" wealth management firm in Boston, however, they [explain](#) that they "charge a management fee based upon a percentage of the total value of the assets [they] manage."

They go on to state that they "do not receive commissions on transactions and [they] accept no other forms of compensation from investment product providers or financial institutions."

We have included them on this list of the top wealth management firms in Boston due to the services they provide as well as this explanation. As always, we recommend that prospective clients confirm the fee structure.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Boston

A "Financial Integrator"

Congress fancies itself as a "financial integrator." This represents this Boston wealth management firm's holistic and comprehensive approach to wealth management.

Congress's financial integration makes them a "one-stop shop" of financial planning services. Their financial planners in Boston can assist you in everything from investment strategies, financial planning, tax efficiency, philanthropic giving, and real estate planning, among other services.

With Congress Wealth Management, you have the resources at your disposal to fully synergize every aspect of your finances.

Ethics and Transparency

Congress Wealth Management is a wealth management firm in Boston that is completely [independent](#). As such, they are committed to operating with 100% transparency in growing and preserving your wealth.

One thing that makes Congress one of the top financial advisors in Boston is that they will never attempt to hide their relationships. Their motives are made clear from the outset, and they disclose all fees upfront to avoid surprising clients with hidden fees or undisclosed partnerships.

In keeping with this philosophy, Congress Wealth Management believes in maintaining frequent and open communication with you. Their Boston financial planners will regularly consult with you regarding your investment performance, suggest changes for improvement, and gladly address any concerns you may have.

Accountability

Congress Wealth Management is [registered with the SEC](#), which obliges them to do what is best for their clients. They are committed to helping you build a successful investment portfolio that meets your needs and reaches your goals.

To help accomplish this, the Congress Wealth team of financial advisors keeps current on a range of professional designations and certifications. They maintain professional memberships with the [following organizations](#):

- Boston Security Analysts Society
- National Financial Planning Association
- CFA Institute
- Boston Economic Club

Partnering with the Community

One of the things we liked best about Congress Wealth Management was their broad range of community involvement. To this end, employees at this wealth management firm in Boston are encouraged to actively participate in local charitable organizations.

Some of these organizations [include](#):

- Boston Symphony Orchestra
- Mayor Marty Walsh Inner-City Scholarship
- National Kidney Foundation
- Vincent Club for Women
- Patrons of the Arts in the Vatican Museums
- Victim Rights Law Center
- West End House Boys and Girls Clubs

Three-Tiered Process

Congress Wealth Management offers [three tiers of financial planning and wealth management](#).

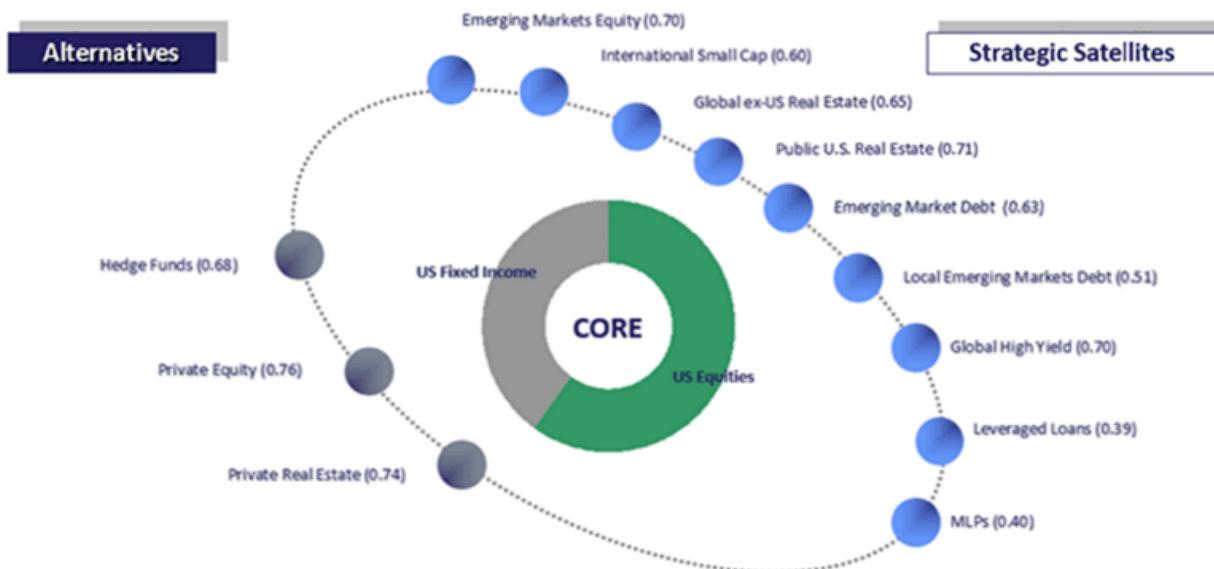
- Tier 1: Portfolio Management. A detailed, customized investment plan is drawn up that reflects the client's financial health and future goals. An account administrator is assigned to each client and serves as the primary contact when discussing the client's portfolio.
- Tier 2: Wealth Management. This is the stage when clients work one-on-one with a Congress financial advisor in Boston. A holistic financial plan is presented to clients and their families. Areas of concern at this tier include trust planning, estate planning, tax efficiency, financial planning, and endowment and foundation services.
- Tier 3: Family Office Services. At this phase, Congress financial advisors guide you and your family through the many investment decisions needed to meet your family-related goals. Some of these goals include children's education, wealth transfer, and charitable giving.



Core and Satellite Approach

Congress Wealth Management applies a two-pronged system to maximize your investments while minimizing your risks. It is called the [Core and Satellite Approach](#), and it represents this Boston financial advisory firm's attempts to diversify your investments and maintain a balanced portfolio.

Core investments include U.S. fixed income, U.S. stocks, and developed market international equities. This core approach is then complemented by satellite investments. Satellite investments are comprised of real estate securities, emerging markets, and high yield bonds.



By implementing this two-pronged approach, Congress Wealth Management can compartmentalize risk in order to better manage it. From there, their financial planners in Boston can supplement and strengthen your portfolio with additional investments. In the end, the Core and Satellites Approach helps Congress financial advisors to restructure and rebalance your portfolio to accelerate progress toward your goals.

[Popular Article: Best Financial Advisors in Cincinnati, OH | Ranking | Cincinnati Wealth Managers](#)

Fiduciary Trust Company Review

[Fiduciary Trust Company](#) is one of the oldest financial advisors in Boston. They were originally [founded in 1885](#) as a family office, but now they operate completely independently and are privately owned. They currently manage assets for high net-worth individuals, families, and philanthropic organizations.

It is unclear whether Fiduciary Trust is a fee-only or fee based wealth management firm in Boston. We encourage any prospective clients of this firm to verify its compensation structure.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Boston

Privately Owned

One feature that makes Fiduciary one of the best wealth management firms in Boston is their ownership. They are privately owned by Fiduciary directors, employees, and founding families.

This, along with their independent status, enables Fiduciary Trust Company to provide unbiased advice. They are not overseen by a parent company that dictates products, services, or affiliate relationships.

Open Architecture

Fiduciary operates according to an open architecture. With this kind of structure, each client has access to the same resources, including top-level financial planning managers with expertise across a wide variety of asset classes.

Fiduciary investment advisors in Boston endeavor to provide objective financial planning and wealth management advice to each client. They consider themselves successful when their clients' goals are met. They do not recommend products or services out of self-interest or due to external pressures.

Well-Rounded, Integrated Services

Fiduciary Trust Company does more than engage clients in investment advice. Their Boston financial planners also assist in estate planning, trust planning, family office services, charitable giving, and tax efficiency.

More than that, however, Fiduciary advisors want to integrate other aspects of your finances into your overall wealth management plan. To that end, this Boston wealth management firm encourages open communication and planning with the other counselors in your life.

Fiduciary Trust advisors are willing to work with your legal counsel, your accountant, your existing family office, your insurance consultants, and more. Their desire is to help maximize your entire financial health and outlook, not just the investment strategies that you entrust to them.

Lexington Wealth Management Review

[Lexington Wealth Management](#) is a financial advisor in Boston that services high net-worth individuals. Their goal is to take the complex, messy, emotional business of financial planning and turn it into a breezier, strategic process.

Lexington is a [fee-only](#) wealth management firm in Boston.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Boston

Independent and Fee-Only Firm

Lexington Wealth Management has positioned itself as a top wealth management firm in Boston thanks to their scaled, fee-only payment platform. They will not charge you hidden fees or slot you into a predetermined model portfolio. Nor do they take commission for additional products and services sold or rendered.

They can make these claims because of their [independent structure](#). Lexington Wealth Management does not answer to a parent company or compensated affiliate. They can make the best decisions for you and your portfolio without having to consider external opinion or undue influence.

Wealth of Service Options

Lexington offers a host of services in the event you want to do more than just invest your money. This Boston wealth management firm provides wealth management services, wealth counseling, lending and mortgage planning, family office services, and financial planning, among others.

Well-Rounded Investment Plan

When Lexington collects information on your finances and goals, they focus on your dreams and processes. They take a 360 degree look at your multidimensional financial picture.

By understanding what motivates you as well as how you structure your finances, Lexington financial advisors get a clearer picture of your life and relationships. They are then able to integrate and synergize this information into a robust plan designed to meet both your financial and personal goals.

Embrace of New Technologies

Technology is changing the composition of several industries, and the financial industry is no exception. This Boston wealth management firm recognizes the importance of staying up to date with the latest advancements in financial technology.

Lexington Wealth Management embraces these new technologies so that you are benefiting from the latest tools to improve and optimize your portfolio. This [includes](#) assistance with asset allocation and asset location, consolidated performance reporting, Monte Carlo Simulation Analysis, tax strategies, concentrated wealth strategies, and more.

[Read More: Best Financial Advisors in Charlotte & Asheville, NC | Ranking | Top Wealth Managers](#)

Modera Wealth Management Review

[Modera Wealth Management](#) is a wealth management firm in Boston, Massachusetts with offices in Georgia, Florida, and New Jersey as well. They put their clients' interests above all by cultivating a relationship that is respectful, educational, transparent, and collaborative.

Directing clients towards the attainment of their financial goals and aspirations is the underlying motivation for Modera's work as a Boston financial advisory firm.

Modera is a [fee-only](#), independent wealth management firm in Boston.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Boston

Wealth Management

The Boston financial planners at Modera offer comprehensive wealth management services for their clients. Because no two clients are alike, no two plans are alike either.

Modera's Boston financial advisors will analyze a client's existing financial situation and have an in-depth conversation with them about their goals for their money. They can help clients plan for any life events whether it's retirement, buying a second home, or planning an extended trip.

Modera clients benefit with integrated coordination when they seek wealth management services from this Boston financial advisory firm. This firm's wealth management services [include](#):

- Investment management
- Cash flow analysis
- Retirement income planning
- Tax planning
- Education funding
- Estate planning
- Insurance analysis
- Strategic goal planning

Modera's team of financial planners in Boston will also collaborate with any financial or legal professionals you are currently working with to provide a well-rounded approach to your wealth management.

Comprehensive and Responsive Financial Planning Process

Modera's financial planners follow a streamlined methodology established by this Boston wealth management firm. This process provides organization as well as providing transparency in the client-advisor relationships. Clients don't have to feel lost or uncertain about the process. Their [streamlined methodology](#) works as follows:

1. Identify, understand, and prioritize personal goals
2. Gather plan for financial data
3. Analyze and develop financial plan and investment strategy
4. Implement recommendations
5. Monitor strategies
6. Communicate and update changes

Comprehensive and Responsive Investment Process

Modera also offers a clearly outlined investment process for their clients. It is particularly helpful that they do this for their investment services, because this is often the area where clients feel the most uneasiness. This wealth management firm in Boston ensures clients understand what is happening with their money and why their advisor is making the decisions that they do.

Their investment planning process involves the [following steps](#):

1. Evaluate current goals and objectives
2. Develop investment policy
3. Implement portfolio design
4. Manage portfolio
5. Measure and report results

This way, even after the portfolio has been implemented, clients can rest assured that their Boston financial advisor is keeping tabs on its progress and is ready to act if changes need to be made. They can also make adjustments if a client's personal situation changes.

North American Management Review

[North American Management](#) is a wealth management firm in Boston, with offices in St. Louis, Missouri as well. The firm was established in 1928 as a family office and has since grown into a Boston financial advisory firm that serves clients nationwide.

This Boston wealth management firm has been registered with the SEC since 1969. Currently, this independent firm has [over \\$1 billion in assets under management](#).

North American Management is a [fee-only](#) wealth management firm in Boston, Massachusetts.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Boston

Dynamic Wealth Planning

Effective wealth planning involves an understanding of how dynamic and ever-changing the markets and people's lives are. This wealth management firm in Boston stays up to date with changes in the financial sector, monitors legal decisions, and stays aware of probate actions so that they are always providing their clients with the best possible advice.

Additionally, client's lives change or unexpected events like death or divorce crop up. These life events can alter a person's financial situation, and if their Boston financial advisor isn't adaptive, there can be dramatic implications. The Boston financial planners at North American Management also keep track of changes to tax law to ensure their clients' plans are kept on track.

Investment Management

Investing is a vital part of growing your money for the future and to reach specific financial goals.

When you invest in the market with a level head and a proper understanding of your chosen assets, you can make your existing money work as hard as you do. And if you do not have this skill set, a financial advisor in Boston can be tremendously helpful.

North American Management's financial planners in Boston can help their clients with asset allocation, security research and manager selection, and portfolio construction and monitoring.

Factors your Boston financial planner will take into consideration when allocating your assets [include](#):

- Economic and secular trends
- Monetary and fiscal policy
- Global interest rates
- Capital flows

When it comes to the security of your investments, this Boston wealth management firm prioritizes value creating assets. Their team of researchers also analyze potential investments before recommending them to clients.

A client's Boston financial planner constructs their portfolio with the following factors in mind:

- Risk tolerance
- Time horizon
- Sources of risk and return
- Investment objectives

Comprehensive Resources

There are so many variables that can impact a client's financial plan and portfolio. While the Boston financial planners at North American Management keep up to date and keep their clients informed, the firm as a whole provide a terrific [resources page](#) for clients who want to do some learning and stay up to date themselves.

Clients can find news as well as financial notes about pertinent topics like potential changes to the tax code.

[Related: Top Financial Advisors in Tampa & St. Petersburg, FL | Ranking | Tampa & St. Petersburg Wealth Managers](#)

Conclusion - Top 10 Best Financial Advisors in Boston, Massachusetts

Our list of financial planners and wealth managers in Boston features a wide variety of firms.

It lists financial advisors in Boston who have been operating for nearly 100 years. It highlights a Boston wealth management firm whose focus is innovative, socially responsible investing. And it presents firms that “pay it forward” through generous involvement in their communities and to charity organizations throughout New England.

But one thing they all have in common is the desire to secure your wealth ahead of an uncertain future.

It is that very uncertainty that drives the Boston wealth management firms on our list to help you better your chances of reaching your life goals. Whether your goals include funding your children's college educations, enjoying early retirement, or transferring your estate to family members without a hitch, the firms on this list can do it all.

Most importantly, they can help you start right now.

Initial consultations are usually free. Best of all, most of these companies utilize a transparent, open architecture. This translates into the peace of mind that comes with knowing they will operate in a way that puts your interests first.

Image sources:

- <https://www.bigstockphoto.com/image-59251715/stock-photo-boston%2C-massachusetts-at-the-public-garden-in-the-spring-time>
- https://www.congresswealth.com/services/service_offerings.html
- <https://www.congresswealth.com/portfolio/framework.html>

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