

Top 10 Best Financial Advisors in Chicago, Illinois (2016 Ranking)

2016 RANKING OF THE TOP WEALTH ADVISORS IN CHICAGO

Finding the Top Financial Advisors in Chicago, Illinois (2016)

Why is now the right time to search for financial planners in Chicago? The turbulent nature of the economy over the last eight years has resulted in scores of people losing money in their investments. While these losses have often been significant, the impact has reached far beyond dollar amounts on a spreadsheet.

People have put retirements on hold, taken up second income streams, and even turned over their homes to foreclosures. The unpredictability of the market has proven that there is no better time than the present for Chicagoans to begin their search for financial advisors in Chicago.

The good news is that most of the best financial planners in Chicago have been around for the past decade or longer. They are proven, tested, and have stood the test of time to continue serving as elite wealth management firms in Chicago.

The bad news is that there are so many wealth managers in Chicago that it can be frustrating to try to sort through them all just to find even a few that you can trust. After all, how can you find a financial advisor in Chicago that specializes in tax-efficient portfolios? Or how will you know if you're getting a financial advisor that is also a Registered Investment Advisor? In Chicago, the options can feel endless, and the search can quickly grow disheartening.

However, before you take even one step toward your goal of finding reputable financial planners in Chicago, you need to know what to look for. It's easy for anyone to happen upon a professional-looking website for a wealth management firm in Chicago and become swayed by the nice graphics and trendy design.

However, it's what financial advisors in Chicago tell you about their processes, fee structures, and levels of transparency, among other things, that matter most.

How do you go about finding the best financial planners and wealth management firms in Chicago? What are the criteria that will help you sort out the top financial advisors in Chicago from the rest?



AdvisoryHQ's List of the Best Financial Advisors in Chicago (2016 Ranking)

- **CastleArk Management LLC**
- **D3 Financial**
- **DeRose Financial Planning Group**
- **Financial Solutions**
- **FourStar Wealth Advisors LLC**
- **FSN**
- **Savant Capital Management**
- **The Mosaic Financial Group**

- **Timothy Financial Counsel**
- **Wheaton Wealth Partners**

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

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Top 10 Financial Advisors in Chicago, IL

(List is sorted alphabetically)

No.	Firm	Location
1	CastleArk Management LLC	Chicago
2	D3 Financial Counselors	Chicago
3	DEROSE Financial Planning Group	Chicago
4	Financial Solutions	Chicago
5	FourStar Wealth Advisors LLC	Chicago
6	FSN	Wheaton
7	Savant Capital Management	Chicago
8	The Mosaic Financial Group	Chicago
9	Timothy Financial Counsel, Inc.	Chicago
10	Wheaton Wealth Partners	Wheaton

Methodology | 2016 Ranking of Top Financial Advisors – Chicago, Illinois

What methodology did we use in selecting this list of best 2016 Chicago financial advisors and top wealth managers in Chicago?

Using publicly available sources, AdvisoryHQ identified a wide range of financial advisors, asset and wealth managers, and financial planners that provide services in Chicago and the surrounding areas.

We then applied AdvisoryHQ's [Breakthrough Selection Methodology](#) to identify the final list of top advisors that provide services to communities in and around Chicago, Illinois.

Detailed Review – Top 2016 Ranking Financial Advisors in Chicago, Illinois

Below, please find a detailed review of each firm on our list of top advisors and financial planners in Chicago. We have highlighted some of the factors that allowed these Chicago financial advisory firms to score so high in our selection ranking.

CastleArk Management, LLC Review

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CastleArk Management is a Registered Investment Advisor in Chicago that caters to businesses and high-net-worth investors. It was founded in 1999 by Jerome A. Castellini. Castellini amassed two decades of experience in the financial world prior to founding CastleArk, and he has managed to grow the company into one of the best financial advisors in Chicago.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Three Basic Strategies:

CastleArk customizes its client portfolios according to one of three strategies: [Large and MID Cap Growth](#), [Small and SMID Cap Growth](#), and [Energy equities](#). Each strategy branches off further into specific niches consisting of a guiding philosophy, a detailed process, and the team of CastleArk investors dedicated to each niche. These investor teams are based

upon each member's qualifications and experience within the particular niche in question.

CastleArk's strategies can be structured in a variety of ways, including as customized accounts or comingled funds. Each strategy is implemented with a disciplined approach that factors in risk tolerance. What's more, CastleArk goes above and beyond by continually seeking to improve these processes through innovation and research.

Putting Your Interests First:

As a Registered Investment Advisor, CastleArk holds to the standard of putting you and your needs first. It is classified as a fiduciary, and its success is predicated on nothing less than your success as its client. There is no conflict of interest, and no commissions are made from recommended products or services.

Sleek, Intuitive Website:

CastleArk's [website](#) is one of the most streamlined and simplified of all of the financial advisors in Chicago. The home page displays an uncluttered navigation bar that gives you the option of reading the firm's overview, learning more about the people who work at CastleArk, the investment strategies that it employs or directing you to a stripped-down contact page. However, if you're in the mood to get right down to business, the homepage lays out all of the information you need in an intuitive format. All you need to do is click; from there, navigating the site is a clean, smooth experience.

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D3 Financial Review

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D3 Financial is one of our best wealth management firms in Chicago due to, among other things, its high fiduciary standards and conflict-free structure. It specializes in financial planning, estate planning, and portfolio management. The aim of D3 Financial is to help you reach your investment goals while educating you to make sound financial decisions.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Complete Transparency:

D3 Financial is not the kind of financial advisor to push products or extra services on you with additional costs. It neutralizes any potential conflict of interest by completely removing commission-based payment structures. This includes charging fees for financial advice as well as additional products and services that it recommends. Additionally, D3 financial advisors do not work on commission.

This means that you can work with D3 knowing that your financial advisor will not push anything extra on you for his/her own compensatory gain. He/she will work with only your best interest in mind.

Client-Centered:

D3 Financial is a completely independent, fiduciary financial advisor in Chicago. D3 advisors consult only with other members of the D3 team in order to give your account the fully-fledged, comprehensive direction that you deserve. No quotas from a parent organization, no company ultimatums, and no added pressure – just the trust and honor of the advisors you are working with.

They can consider a variety of options to grow your portfolio without the conflict of interest that comes from working on commission.

Multiple Inputs on Your Account:

With D3 Financial as your financial advisors in Chicago, you don't get just one person working on your portfolio. D3 takes a **team approach** that informs your investment strategy with the complete expertise, knowledge, and experience of the entire D3 Financial family. This gives you the added security that you are receiving tried-and-tested financial planning advice.

Financial Direction Plus Education:

The goals of D3 Financial don't stop with successfully growing your investment portfolio. Instead, its financial advisors are unique in their fields, and they aim to educate you, the investor. They want you to understand every

aspect of your investment and the possible implications of the choices that you make with your money.

To that end, D3 makes available to you a wealth of knowledgeable, educated financial experts. This includes Certified Financial Planners, a Chartered Financial Analyst, a Certified Public Accountant, a Certified Investment Management Analyst, a personal financial specialist, and a Certified Estate Planning Specialist.

Continuing Education:

Not only do D3 financial advisors focus on educating you, but they also make sure that they keep themselves in the know as well. By teaching you the pros and cons of your investment decisions, D3 gives you greater control. The financial advisory world changes rapidly, however, and the education that financial advisors received months ago may not be as relevant today. D3's advisors stay on top of trends and changes in investment and tax law through continuing education, allowing them to keep your portfolio up-to-date.

Wealth of Market Experience:

D3 Financial has been advising investors for over 3-1/2 decades. During that time, the American economy has undergone quite a bit of fluctuation, from recessions to booms to financial crises. Throughout it all, D3 has proved to be stable and resilient, helping clients weather any storm. This is helped in part by the 50+ combined years of investment and financial management experience among D3's financial advisory team. Investing with D3 means that you are investing with one of the most reliable financial planners in Chicago.

No "One-Size-Fits-All" Approach:

D3 makes a point of listening to you and your concerns before crafting a personalized investment strategy. It calculates your risk tolerance and couples it with the goals that you have in mind for your money. D3's Certified Financial Planners compose each financial plan rather than punching numbers into a computer and printing out a generic template. This ensures that your financial advice has been personally and thoroughly reviewed by a human advisor prior to implementation.

Plans Tailored to a Range of Individuals:

D3's financial advisors can assist nearly every type of personal investor. Not only can they advise individuals and/or their families, but they can also provide guidance to corporate executives, white-collar professionals such as dentists and doctors, corporate executives, Chartered Financial Analysts, and business owners.

Services to Cover Every Need:

Whether you are saving for college or saving for retirement, D3 Financial is experienced enough to **provide guidance on any investment goal**. It can assist you with managing your short-term and long-term financial goals, estate planning or your employee portfolios if you're a business executive. Business owners and professionals with student loan debts can benefit from D3 Financial's direction too. In all, D3 Financial will be able to assist you in maximizing your investments no matter your needs.

Ask Them Anything:

D3 asks plenty of questions to learn more about you and to better understand your reasons for investing. What's more, it encourages you to ask your own questions at any stage of the financial planning process. It is available anytime during business hours to answer questions or provide input and counseling on major financial decisions.

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DeRose Financial Planning Group Review

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DeRose Financial Planning Group was founded by Karen L. DeRose and focuses on implementing a disciplined and structured investment approach that minimizes clients' risks. Karen DeRose started DeRose FPG after growing up with a father who started as a financial advisor way back in 1958.

When it was her turn to start her own financial planning practice, Karen DeRose founded the DeRose Financial Planning Group in 1996. In keeping with family tradition, her son, Anthony, is now a partner at DeRose. All told, financial planning and advisory has been the family business for nearly 6 decades.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Fee-Based Financial Planning Services:

One of the things that makes DeRose a top wealth management firm in Chicago is its commitment to working in your best interest. With DeRose Financial Planning Group, you get a company that does not take commissions. You pay your fees for the advice you receive and for the annual maintenance of your portfolio. There are no hidden fees and no attempts by team members to upsell you on services that are not in your best interest.

Continually Seeking to Learn and Improve:

Each member of the primary financial advisor staff at DeRose has sought to expand his/her bank of knowledge and skills. Several team members are licensed to sell insurance in Illinois and are currently seeking to grow their licensures. Even the support staff members have educated themselves on the ins and outs of financial planning in order to better serve clients' questions, ideas or concerns.

A Holistic Approach to Investing:

Rather than focusing on one aspect of your investments or planning philosophy, DeRose Financial Planning Group takes a holistic approach. It asks questions about your life, plans for your estate, how you'd like to fund your children's college education, your retirement goals, and more. DeRose's purpose is to help you maximize your preparedness for life's big events rather than waiting until it's too late.

Multi-Generational Planning:

If one of your goals is to provide security for your children and your children's children, then DeRose FPG has a plan for you. With its Multigenerational Planning, DeRose takes a snapshot of your life, financial health, and all of your investment goals. From there, it determines how to best build a comfortable family savings for years to come. Not only that, but part of the DeRose process includes educating your children about handling money responsibly when they inherit it. DeRose can also help smooth out the process of passing your family business onto your children when the time comes.

Variety of Online Resources:

DeRose Financial Planning Group is not content to simply get your business. Instead, it wants to educate you. It accomplishes this by posting a wealth of links, informative videos, and educational articles under its ****Resources**** tab. You can seek answers to any questions you may have, ranging from managing your estate and preparing for taxes to which type of insurance is best for you and lifestyle management, among others. Also included is a helpful glossary of terms to assist clients who might not understand financial planning terminology.

Total Team Effort:

DeRose employs financial planners in Chicago who boast a range of training and specializations. A Certified Public Accountant is on staff to assist with tax queries. Karen L. DeRose herself is a Chartered Retirement Planning Counselor and a Certified Financial Planner. She is also licensed to sell health and life insurance in several states. Another team member is pending in CFP certification. Several staff members hold Series 6, 7, 63, and 66 registrations, enabling you to receive assistance from several DeRose advisors when it comes to investing your money. Furthermore, almost every primary team member is licensed to sell health and life insurance in Illinois.

Nearly Two Decades of Experience:

DeRose Financial Planning Group has several years of experience in financial planning. Karen L. DeRose has been in the financial planning field for 19 years. The other members of the DeRose staff have almost 5 decades of combined financial planning experience. This also includes members of the DeRose team that are not certified financial planners but who are, nonetheless, knowledgeable in investment strategy through their respective licensures and certifications.

A Plan Focused on Your Needs:

DeRose Financial Planning Group utilizes a systematic approach to learning about you and your specific investment goals. Over the course of 13 weeks, DeRose draws up an initial consultation that it then proceeds to expand via additional interviews with you. The time commitment on your end is

minimized, resulting in more time spent on finalizing your investment approach and less time getting lost in the details.

From there, DeRose financial advisors write up your personalized investment strategy and provide periodic upkeep on your account. When your portfolio changes or needs attention, you can rest assured that DeRose financial advisors will get in touch with you immediately.

A Website That Educates and Informs:

One of the big pluses to navigating the DeRose Financial Planning Group's website is the many educational [resources](#) that it puts at your disposal. DeRose provides several outbound links, [articles](#), and informational videos for prospective and current investors alike. You also have access to financial calculators, a tax calendar, and downloadable tax forms.

A Process That Includes Your Concerns:

Throughout the course of the financial advising process with DeRose Financial Planning Group, your concerns are put first. Its process includes 13 weeks of discussion and input gathered from you, not to mention requiring your approval before moving ahead with each new phase of the process. DeRose makes it clear that it wants to hear about any concerns that you may have about your investment strategy. It has an experienced, available staff that is ready during business hours to answer questions.

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Financial Solutions Advisory Group Review

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Financial Solutions Advisory Group provides financial planning and wealth management services to high-net-worth individuals and families.

As one of the best financial advisors in Chicago, Illinois, Financial Solutions Advisory Group is a fee-based financial planner. It structures client portfolios around a mix of investment types to limit risk and help clients reach their

goals faster. Of all of the top wealth management firms in Chicago, Financial Solutions Advisory Group has amassed some of the highest levels of experience.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Hourly Rates, No Commissions:

The first thing to like about Financial Solutions Advisory Group is that it doesn't make commission off services or products that it recommends to you. Instead, it charges an hourly fee for developing your holistic, multifaceted financial plan. Once you confirm your plan and FSAG implements it, you will pay a percentage of AUM for Financial Solutions Advisory Group's handling of your investment. Management fees for graduated portfolios start at 1% annually for stock and bond portfolios and 0.50% for bond portfolios.

Independent and Fiduciary:

You can trust Financial Solutions Advisory Group with your investment knowing that it will be looking out for you and you only. It is 100% independent and privately owned, meaning that it doesn't have another company or organization to whom it must answer.

It is also registered with the SEC, which means that it must legally look out for what's best for its clients ahead of its own bottom line.

Due to its independent and fiduciary nature, Financial Solutions Advisory Group has the freedom to select whichever financial management professionals, services, and products will help you meet your investment needs.

Always There for You:

Financial Solutions Advisory Group prides itself on its low client-to-advisor ratio. By keeping a manageable number of clients assigned to each advisor, Financial Solutions Advisory Group ensures that you will receive the utmost in client service and attention throughout the investment process.

Additionally, this guarantees that your portfolio will be managed regularly and with a high degree of personalization to make sure that your financial needs are being met.

An Open Door:

In keeping with its low client-to-advisor numbers, Financial Solutions Advisory Group wants to maintain open lines of communication with you at all times. It emphasizes consistent, in-person meetings wherein advisors review your portfolio and, if necessary, suggest changes to help you better reach your goals. They also go over any pertinent financial trends that may be of interest to you.

Years of High-Quality Investment and Wealth Management Experience:

One of the great things that we found when reviewing Financial Solutions Advisory Group was the experience level of its team. The FSAG staff combined has over 150 years of financial planning and wealth management experience; more than most of the other financial advisors in Chicago on this list.

Team members also started out working for some of the country's most esteemed financial organizations, giving the company the kind of experience in premier institutions that translates into top-tier service for you.

When you let Financial Solutions Advisory Group handle your investments, you can feel comfortable with its knowledge and expertise.

Investment Plans Built Around You:

Financial Solutions Advisory Group's experience and expertise gives it the ability to craft a robust portfolio built around your specific needs and goals. It will consider only the best investment opportunities in order to minimize risk and maximize growth. Depending upon your specific needs, Financial Solutions Advisory Group can customize your investment strategy around individual securities, ETFs, institutional managers, mutual funds or a diversified bond-only portfolio.

Smooth Online Interface:

One of the nicer things we liked about Financial Solutions Advisory Group was the attention and detail that it put into its website. Not only does it look professional, but it also handles intuitively. The website outlines the firm's essential services so that you can quickly discern whether you'd like to proceed with this financial advisor in Chicago.

It Knows Its Target Audience:

For as long as it has been in business, Financial Solutions Advisory Group has worked primarily with high-net-worth clients. The typical FSAG client is an individual or family who can put \$500,000 or more toward his/her investments.

As one of the best financial advisors in Chicago, it matches up best with wealthy clients who are looking to enter into long-term relationships with a quality financial planner who will take a holistic approach to managing his/her clients' wealth. Furthermore, it is open and transparent when it comes to marketing itself toward those high-net-worth clients who wish to participate as much as possible in their own financial planning but who must delegate oversight for purposes of time, interest level or experience.

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FourStar Wealth Advisors, LLC Review

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FourStar Wealth Advisors made it onto our list of the best financial advisors in Chicago due to its fee-based, fiduciary approach. FourStar is an independent Registered Investment Advisor (RIA) whose principal aim is to help you reach your financial goals. It has been in business since 2014.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

No Conflict-of-Interest:

FourStar Wealth Management avoids the conflict-of-interest issues that you would find with other financial advisors in Chicago. It makes no commission when it recommends products or services to you and won't work under quota or hit you with hidden fees. It is independent and fiduciary, keeping your hopes and dreams for the future at the heart of how it operates.

Custom Plans to Build the Life You Want:

FourStar Wealth Management kicks off its process by sitting down with you and learning about your financial goals. Its advisors want to discover your most important life dreams and construct a comprehensive investment strategy from there. They make sure that each plan is appropriate for each individual client's needs, be it amassing wealth, retirement planning or multi-generational planning.

"Build-Live-Share" Philosophy:

The core philosophy of FourStar Wealth Advisors centers on a "Build-Live-Share" ethic. FourStar helps clients "build" their wealth over the long haul, typically for the majority of one's life. It accomplishes this through regular monitoring of your portfolio, applying changes when needed to ensure that you are on track to meet your goals, and helping you in whatever way that it can to adhere to the plan's implementation.

After the build phase has wrapped up, FourStar believes that it is time for you to "live." This is the retirement phase when you will be living off your earnings while creating very little or no new income. FourStar wants to help you experience a vibrant "live" stage. To this end, it makes recommendations on the appropriate sources from which to draw funds so as not to upset the balance of your portfolio.

The "share" phase can occur both during the "live" stage and beyond. FourStar helps identify key charitable opportunities aligned with your interests and values while maximizing your donations' contributions to your overall savings. In addition to charity, FourStar can assist in the transfer of wealth between generations when the time is appropriate.

Specializes in Individuals and Families:

FourStar Wealth Advisors specialize in providing a range of advisory services to individuals and their families. FourStar helps you do it all, including asset protection, investment planning, financial planning, and retirement planning, among others. It also has services to help businesses in the areas of pension planning, stock services, health benefit planning, and insider transactions.

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Financial Strategy Network, LLC Review

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Financial Strategy Network is an independent, fee-based fiduciary financial planner in Chicago. It offers a four-tiered suite of financial planning that includes investment management, medical practice consulting, divorce financial planning, and retirement planning.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Fee-Based with Minimal Commissions:

What we liked about Financial Strategy Network (FSN) was its fiduciary standards and primarily fee-based payment structure. In the interest of transparency, FSN discloses its fees at the start of any client relationship prior to commencing with implementation.

Financial Strategy Network charges a reduced rate for clients who wish to update their financial plans annually. It also charges management fees at a fixed percentage of AUM.

Additionally, management fees are inversely proportional to asset gains, i.e., as assets increase, the management fees drop.

While FSN is largely commission-free, it does make a small amount of commission on the sale of annuities, mutual fund "C" shares, and 529 plans. FSN can offer these products due to its affiliation with Comprehensive Asset Management and Servicing. The total amount of commission earned by FSN advisors is totaled at 5% of Financial Strategy Network's annual business.

In keeping with its pledge of transparency, however, FSN is forthright and keeps its clients aware of such commissions.

Client Outreach:

One of the unique aspects of FSN is in how it treats clients outside of the traditional client-advisor relationship. FSN goes above and beyond the vast majority of financial advisors in Chicago by regularly holding client events. During these events, clients are encouraged to bring their families and spend some recreational time with the FSN team. Examples of such client events

include games of indoor bocce ball, a day at the driving range, and watching horse racing.

Highly Experienced & Qualified Staff:

Whether it's partners, lead advisors or assistant advisors, most members of the financial planning team at FSN have at least a decade or more of experience in the financial planning and wealth management industry. You can trust that FSN knows the business inside and out.

While a highly experienced team is one of the great things that we liked about FSN, we also liked how the higher-than-average number of advisors ensured a low client-to-advisor ratio. This way, you can relax knowing that FSN will provide you with personalized attention.

FSN's financial advisory team also boasts a number of professional designations between its members. Among the designations represented at FSN are Certified Financial Planners, Chartered Financial Consultants, Certified Investment Management Analysts, and Chartered Life Underwriters.

Detailed and Customized Model Portfolios:

Financial Strategy Network goes to great lengths as one of the best financial advisors in Chicago to evaluate your entire financial "big picture" and all of the separate parts therein. From there, it zeros in on your financial posture and analyzes it in light of your investment goals.

After this analysis is complete, FSN advisors sync you with the Financial Strategy Network model portfolio that best fits your situation. Then, they select the particular investments to include in your portfolio, choosing between mutual funds, separately managed accounts or ETFs.

Feedback Encouraged and Welcomed:

When reviewing FSN for our list of top financial advisors in Chicago, one thing that stood out was its extensive interview process. FSN takes time to get to know your financial posture, goals, objectives, and risk tolerance, among many other pieces of data. From there, its advisors ask a copious amount of questions in order to get a better feel of how to help your portfolio grow.

In addition, they welcome your questions and concerns at every step of the way. They will not proceed with any phase of your financial planning process unless you have given them your input and are comfortable in signing off on the plan.

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Savant Capital Management Review

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Savant Capital Management is an independent, fiduciary financial advisor in Chicago whose tagline is "building ideal futures." Savant aims to make this mantra a reality by helping its clients maximize their investments while safeguarding themselves and their assets during the journey.

In 2015, Savant Capital won Charles Schwab's Best-in-Business Impact Award. The same year, it was ranked 39th out of 100 in *Financial Planning* magazine's "Top 100 RIA Firms." It was also voted 42nd in Investment News's "Largest Fee-Only Registered Investment Advisors" for 2015. It currently serves clients around the country from offices located throughout Illinois, Virginia, and Wisconsin.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Transparent, Tiered Fee Structure:

Like many of the other best financial planners in Chicago on our list, Savant Capital Management operates according to a fee-based payment process. Rather than a "one-size-fits-all" approach, Savant calibrates its fees according to your specific plan, suite of necessary services, and asset level. All fees are disclosed upfront during the initial consultation.

We also liked that Savant Capital Management will not recommend products or services to you based on commissions. Instead, Savant will only suggest the products and services that you truly need to satisfy your investment needs.

Helping You Weather Life's Storms:

We particularly liked Savant Capital Management's focus and dedication to your long-term success. As one of the best financial advisors in Chicago, it not only wants to grow your portfolio, but it also wants to help you plan and save for life's unpredictable events.

To this end, Savant asks you to complete *The Ideal Futures Financial Health Assessment*SM to help get a better idea of where you are in life and how to help you move forward. *The Ideal Futures Financial Health Assessment*SM hones in on 10 "key planning areas" that represent Savant's core financial planning philosophy.

This assessment assists Savant in identifying your goals, reviewing your current investment plan, and evaluating the state of your portfolio. From there, Savant customizes a plan to suit your needs, including a strategy to handle tax implications. It will then implement your plan, regularly monitoring it to ensure that you are making progress toward your goals.

Part of how Savant Capital Management implements your plan is through its *Ideal Futures Portfolio*SM. This is an engineered, model portfolio that will reduce your risk while investing in assets that have a higher chance of success. Savant employs an evidence-based process that evaluates objective criteria in selecting your investments. This eliminates unnecessary risk while placing you in a better position to succeed and meet your goals. Savant's process is thorough and backed by hard data.

Dedication to Community Involvement:

Savant Capital Management dedicates itself to being involved in the community through a variety of ways. It regularly makes charitable contributions to organizations that focus on goals similar to its own. These goals include:

- Health and wellness
- Lifelong learning
- Supporting the arts
- Helping the less fortunate

We also liked the lengths to which Savant has gone to qualify organizations for their contributions. To ensure that it is donating to a reputable business, Savant has put into place the following requirements:

- Must be a non-political and non-discriminatory organization
- Established for more than 12 months

- Tax-exempt 501(c)(3) status for charitable donations
- Balanced admin vs. program expenses
- Operates with a moral compass

Regular Volunteerism:

Savant encourages its employees to regularly volunteer with nonprofits that are local to its many offices. With this purpose in mind, Savant established the Savant Volunteer Grant Program.

Through the program, Savant highlights its employees' volunteer efforts by contributing to the same organizations as its employees. Savant goes even further than this by encouraging companies to contact it directly with any volunteer opportunities that they may have for Savant staff.

Range of Services:

Savant Capital Management offers a wide range of services that will appeal to most investors. It carries standard services such as investment plans, financial plans, and retirement plans. Families of significant wealth can use Savant to manage their money while helping to oversee the transfer of wealth between generations.

Savant can also assist with the creation of several types of personal and special purpose trusts. It can prepare personal, estate, business, and trust tax returns in addition to the other services mentioned. Lastly, Savant Capital Management can consult with businesses that need help with their payroll and accounting.

Tenured and Professional:

Of all of the financial advisors in Chicago, Savant Capital Management is one of the longest tenured firms. Established in 1986, the Savant Capital Management team has grown to include several offices throughout the state of Illinois and offices in both Virginia and Wisconsin. Its stability and growth reflect its commitment to helping clients meet their investment goals.

Trust and Confidence:

Savant Capital Management stands out from the crowd of financial advisors in Chicago with its transparency and focus on your success. As a fiduciary

registered with the SEC, Savant will put you at the center of its business. To that end, the Centre for Fiduciary Excellence (CEFEX), an independent assessment organization, audited Savant Capital Management.

In fact, the Centre for Fiduciary Excellence (CEFEX) has recognized Savant as a Certified Investment Steward and a Certified Investment Advisor. These designations confirm that Savant's fiduciary practices as an employer and as a provider have been audited by an independent global assessment and certification organization to be in conformity with global fiduciary best practices.

Member of Zero Alpha Group:

Savant is a member and co-founder of the Zero Alpha Group, a nationwide network of advisory firms. Founded in 1995, Zero Alpha Group shares the same philosophy as Savant when it comes to providing independent, transparent, and fiduciary-based financial planning.

The members of Zero Alpha Group are dedicated to a set of core values, including avoiding conflicts of interest as well as providing tax-efficient portfolios and objective, structured financial planning, among others.

Targeted Audience:

Savant Capital Management focuses on high-net-worth individuals who want to preserve their hard-earned capital and pursue steady, wise growth. However, more than most financial advisors in Chicago, Savant also provides some leeway in allowing you to meet the criteria necessary for establishing a relationship with it. These criteria include:

- Projecting a portfolio valuation of \$500,000 or more within the next 12 months
- Expecting a portfolio of \$1,000,000 by the end of 5 years
- Immediate family member of an existing Savant client with a portfolio of more than \$5,000,000
- Paying a \$5,000 minimum annual fee to cover investment management services

Another great aspect of Savant Capital Management is its expanded reach. It not only has clients in nearly every state across the country but also enables long-distance clients to utilize its services via its eSavant Advisor service. Clients utilizing this service have access to all of the same products, services,

and consultations as clients who are regularly able to meet with Savant in person.

Savant Capital Management is a Registered Investment Advisor. This announcement is only intended for interested investors residing in states in which Savant is qualified to provide investment advisory services.

Please contact Savant to find out if they are qualified to provide investment advisory services in the state where you reside. Savant's marketing material should not be construed by any existing or prospective client as a guarantee that they will experience a certain level of results if they engage Savant's services and includes lists or rankings published by magazines and other sources which are generally based exclusively on information prepared and submitted by Savant. Please Note: "Ideal" is not intended to give assurance as to achieving successful results.

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The Mosaic Financial Group Review

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The Mosaic Financial Group is a fee-only, fiduciary, and independent financial advisor in Chicago. It manages over \$700 million in client assets, with its client base ranging from individuals and families to corporate executives and businesses. Some of the services that Mosaic offers include taxes, estate planning, and financial planning, to name a few. This makes The Mosaic Financial Group a one-stop shop of financial planning and wealth management.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Fee-Only Independents:

The Mosaic Financial Group is fee-only and conflict-free. This means that you don't have to worry about being pressured into purchasing additional products or services based on commission or company quotas. Mosaic, like other top financial advisors in Chicago, is committed to offering objective financial planning advice with the sole purpose of growing your portfolio and helping you achieve your goals.

Dedicated to Long-Term Relationships:

The aim of Mosaic Financial Group is to help you with all aspects of your finances. In this way, it can make full use of the available synergy between its products and services. This translates into a more tax-efficient, robust portfolio for you, not to mention the likelihood of quicker progress toward your goals. As evidenced by this, Mosaic Financial Group is willing to go the distance with you along your financial planning journey and beyond.

A Total Service Package:

Like the other top financial advisors in Chicago that appear on this list, Mosaic Financial Group puts your interests and well-being at the front and center of every move it makes regarding your investment strategy. However, unlike many of the other financial advisors in Chicago, Mosaic seeks to offer each client a well-rounded service package wherein the individual services complement and even strengthen each other.

For instance, Mosaic considers the tax implications of your estate planning, succession planning, and even retirement planning. From there, it offers services designed to lessen your tax burden by making your overall strategy more tax-efficient. The same holds true for how Mosaic considers each client's investment advisory, family concerns, financial planning, and insurance needs. By utilizing as many of Mosaic's services as possible, you enable it to strengthen and harmonize your wealth management plan across the board.

Unified Team Approach:

The Mosaic Financial Group boasts a number of professionals with qualified designations to their name. Some of these include investment specialists, Certified Public Accountants, and Certified Financial Planners, among others.

Mosaic leverages the many "hats" worn by team members into a powerful group management approach toward client portfolios.

More than one set of qualified eyes review each individual portfolio, with every team member contributing as much as they can. In this way, Mosaic Financial Group helps build investment strategies that are sound and backed by the firm's collective expertise.

Questions Are Free:

The Mosaic Financial Group wants to hear from you. It actively encourages clients to call at any time with questions or concerns. To reassure its clients of its openness and approachability, The Mosaic Financial Group lets clients know that they need not worry about getting stuck with voicemail or being billed in the same way that they might with other financial advisors.

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Timothy Financial Counsel Review

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We found [Timothy Financial Counsel](#) to be one of the best financial advisors in Chicago, Illinois, thanks in part to its fee-only structure and conflict-free approach. Unlike other financial advisors, Timothy Financial Counsel only offers financial planning services on an hourly basis. Its financial planning services are geared exclusively toward helping each client reach his/her personal goals.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Unique Hourly Rate:

Among financial advisors in Chicago and beyond, Timothy Financial Counsel stands out as being one of the only firms to provide financial planning advice on an hourly basis. Timothy charges nothing for the initial consultation, after which it provides you with a firm quote based on your goals and financial posture.

Hourly fee rates are subsequently determined according to the number of services you will be utilizing, the type of services, and the specific advisor to whom you are assigned. Aside from the hourly fee, Timothy Financial Counsel does not earn anything from commissions, referrals, asset management fees, and carries absolutely no hidden fees.

After the initial consultation and planning phase is complete, Timothy charges a small portion of the original payment for upkeep and oversight coordinated according to the client's discretion. From there, clients are billed for whatever time they spend with Timothy Financial Counsel, e.g., a 5-minute phone call is only billed for 5 minutes. While some clients might not like the idea of paying for phone calls of any length, Timothy's hourly fee approach guarantees the utmost in transparency. You will never be surprised by extraneous charges while working with Timothy Financial Counsel.

An Entire Office Working for You:

Not all financial advisors in Chicago dedicate a team to review your portfolio and investment plan. However, when you do business with Timothy Financial Counsel, you engage with a smaller office with a low client-to-advisor ratio.

This enables Timothy Financial Counsel to oftentimes dedicate its entire office of professional financial planners to the task of crafting your financial plan. Many advisory firms simply assign you to a single advisor while utilizing other departments as necessary, such as taxes, accounting, retirement, and the like. It is rare for an entire team to work on balancing your portfolio at once.

Likewise, it is even rarer for all of the employees in a single company to do so. Timothy Financial Counsel promises just that throughout the process of originating your plan.

After devising your plan, Timothy Financial Counsel offers its financial planning services on an as-needed basis. It will not perform investments, oversight, upkeep or automatic rebalancing on your portfolio. All advice is initiated only at the client's request.

Timothy Financial Counsel encourages clients to take their plans to a wealth management firm. Otherwise, clients who wish to self-implement their plans are directed to discount brokers such as Fidelity, Scottrade or Charles Schwab.

Bundled Services:

Timothy Financial Counsel can help you save money by "bundling" together its four primary services during your interview and strategy phase. These services include cash flow and retirement planning, life insurance evaluation, investment analysis, and estate planning. Timothy likens its integrative approach to a house with four parts: each one supporting and adding to the others.

Clients are free to select only the services that they truly need or want. However, choosing all four services can save a client money by making the most of Timothy's hourly rate. From there, Timothy Financial Counsel tailors a plan around the client's unique needs and risk tolerance.

No Income Restrictions:

Most of the top financial advisors in Chicago require their clients to meet a minimum income, usually around \$500,000 or more. They cater to high-net-worth individuals or families, and their fees reflect this.

Timothy Financial Counsel, on the other hand, does not pose any such restrictions. It welcomes clients of any economic background or net worth. It can accomplish this primarily due to its hourly-based fee structure; a feature that creates an open door atmosphere for the average income individual into what is otherwise an elite and exclusive service.

Empowers You to Start on Your Own:

Timothy Financial Counsel posts questionnaires and worksheets on the DOWNLOADS page of its website. These papers help potential clients become better prepared for their initial consultation with Timothy's advisors. For the advisors at Timothy Financial Counsel, this little bit of homework on a client's behalf can aid in more quickly assessing the client's needs.

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Wheaton Wealth Partners Review

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Wheaton Wealth Partners is an independent, fee-only, fiduciary financial planner in Chicago that is located approximately 30 miles from the center of Chicago in the western suburb of Wheaton.

The firm is known for its *InsightMap* software that creates mind maps of critical client information, goals, relationships, and all of the connections in between.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Transparent, Fee-Only Billing:

Wheaton Wealth Partners is not only independent but also operates a fee-only structure. Like many of the other top financial advisors in Chicago, Wheaton Wealth does not earn commission or compensation for any product or service it recommends. Its fee structure is laid out upfront to avoid surprises, allowing Wheaton Wealth to operate honestly and transparently.

A Team of Dedicated Professionals:

Wheaton Wealth Partners goes above and beyond most financial advisors in Chicago by operating as a team to review every plan that it creates. Its low client-to-advisor ratio lets it accomplish this more efficiently, guaranteeing that you will get quality attention and the perspective of multiple qualified professionals.

Educational Webinars:

Another thing that we liked about Wheaton Wealth Partners that set it apart from other financial advisors in Chicago was its helpful webinars. Wheaton Wealth periodically hosts webinars on sought-after financial matters in an effort to better inform investors. The webinars are not restricted to Wheaton Wealth Partners' clientele, however, but are instead offered as free and open to the public.

Services to Address All of Life's Needs:

Wheaton Wealth Partners can help you plan and manage your personal financial goals. This can include your insurance needs, funding your children's

college educations, debt relief, and making your portfolio more tax-efficient, among others. It also specializes in making the most of your charitable donations in a way that maximizes the benefits for both you and your preferred charities.

Another practice that we thought made Wheaton Wealth Partners one of the “best financial advisors in Chicago” was its commitment to staying on top of ever-changing federal tax laws. It wants your portfolio to be as tax-efficient as possible, unburdening you and your family of the heavy costs that unchecked taxes can bring.

Additionally, Wheaton Wealth Partners offers services in the areas of multi-generational planning and investment advisory. Whatever wealth you accumulate, Wheaton Wealth will help you manage, grow, and transfer when the time comes.

InsightMap:

One of the most unique features of any financial advisor in Chicago can be found in Wheaton Wealth Partners' *InsightMap* technology.

An *InsightMap* works exactly like a traditional mind map except for one very significant difference: each "bubble" in the *InsightMap* is used to clarify a client's current financial health, future investment goals, and existing relationships. Every piece of data is slotted into the *InsightMap* software to create a visual representation of the client's investment needs.

The *InsightMap* technology enables Wheaton Wealth Partners and its clients to see the big picture regarding individual clients' finances. By viewing all of their pertinent data at once, Wheaton Wealth financial advisors can more easily identify the weaknesses and strengths in clients' cash flows.

Key to accomplishing this is the firm's methodology of incorporating both financial and non-financial aspects of a client's life into its customized *InsightMap*.

When done in this way, the relationships between disparate elements in the client's life become clearer as do their effects on the client's finances. From here, Wheaton Wealth Partners can suggest potential solutions and begin crafting the client's investment strategy.

Conclusion – Top 10 Best Financial Advisors in Chicago, Illinois

There is something for everybody on our list of top financial advisors in Chicago, Illinois. While most of these Chicago wealth management firms cater to high-net-worth individuals and families, there are also options for people of average wealth and means. Just as a troubled economy affects everybody, there are financial planners in Chicago to help people at every income level make it through the tough times.

If you're thinking about hiring a Chicago wealth management firm or Chicago financial advisor, it would pay to consider your goals for the future. All of the Chicago-based financial planners on our list will ask you about your goals and your needs.

By starting to ask these questions now, you will be helping yourself to clarify the most essential questions regarding financial planning: What do I want to accomplish by investing and saving? What is truly important to me and my family? How do I want to provide for the ones that I love?'

Every financial planner in Chicago on our list offers a free initial consultation. The potential positives outweigh the negatives, especially when only a few hours of your time are required. Compared to more years of a rocky economy, the trade-off in favor of your financial well-being and peace of mind can make all the difference.

If you have questions, comments, or tips about this "Top 10 Best Financial Advisors in Chicago, Illinois" article, send us an **email**. Follow us on social media to be the first to hear about major economic news stories.

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Cheers,
AdvisoryHQ Team