

Top 10 Financial Advisors in Wisconsin (Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon)

2016 RANKING OF TOP WEALTH ADVISORS IN WISCONSIN

Finding Top Financial Advisors in Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon, Wisconsin

Whether you have already entered retirement or are just starting out on the retirement journey in Wisconsin, having a good Wisconsin financial advisor by your side can be the difference between financial success and financial hardship.

The question is who are the best financial advisors in Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon, Wisconsin?

The sheer number of financial advisors in Milwaukee and its surrounding areas makes choosing just one a difficult task. However, by developing a clear idea of the services you are looking for and doing proper research, the answers to the following questions will soon become clear:

- Where can I find the best financial planning, wealth management, and asset management services in Wisconsin?
- Where should I go if I am looking for additional services like estate planning, tax management, and risk management?
- What types of fees do financial planners in Milwaukee charge, and which Wisconsin investment advisor is best for me?

While the final decision rests in your hands, we have compiled a list of the top financial advisors in Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon, Wisconsin to help give you a jumpstart on your way to financial success.



AdvisoryHQ's List of the Best Financial Advisors in Milwaukee and Surrounding Areas

- **Alpha Investment Consulting Group**
- **Annex Wealth Management**
- **Ellenbecker Investment Group**
- **Investors Advisory Group (IAG)**
- **Landaas & Company**
- **Marietta Investment Partners**
- **McCarthy Grittinger Financial Group**
- **NorthStar Asset Management**
- **PJS Investment Management**
- **Spectrum Investment Advisors**

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

Top 10 Financial Advisors in Wisconsin (Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon)

Firm	Location
Alpha Investment Consulting Group	Milwaukee
Annex Wealth Management	Milwaukee
Ellenbecker Investment Group	Pewaukee
Investors Advisory Group (IAG)	Waukesha
Landaas & Company	Milwaukee
Marietta Investment Partners	Milwaukee
McCarthy Grittinger Financial Group	Milwaukee
North Star Asset Management	Milwaukee
PJS Investment Management	Cedarburg
Spectrum Investment Advisors	Mequon

Methodology for Selecting Financial Advisors in Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon, Wisconsin

What methodology did we use in selecting this list of best Pewaukee, Waukesha, Cedarburg, Mequon, and Milwaukee financial advisors and top wealth managers in Wisconsin?

Using publicly available sources, we identified a wide range of financial advisors, asset and wealth managers, and financial planners that provide services in Milwaukee and its 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 Milwaukee, Wisconsin.

Detailed Review – Top Milwaukee Wealth Managers and Financial Planners

Below, we present a more detailed overview of the best financial advisors in Milwaukee, Pewaukee, Waukesha, Cedarburg and Mequon, including the many factors that allowed each firm to score so high in our selection ranking.

Alpha Investment Consulting Review

Founded in 1989, Alpha Investment Consulting group has been offering independent investment consulting services in Milwaukee, Wisconsin for over 25 years. It is now one of the biggest fee-only investment consulting firms in Wisconsin, with some of the largest educational, health care, and philanthropic organizations and corporations as its clients.

As one of the top financial planners in Milwaukee, the company's fee-only status allows it to place its clients' interests first. Over the years, Alpha Investment Consulting's experienced team of analysts and consultants have stuck to the company's principles of independence, trust, and transparency.

The team's commitment and Alpha's data-driven process are designed to produce steady growth, solid returns, and client peace of mind.

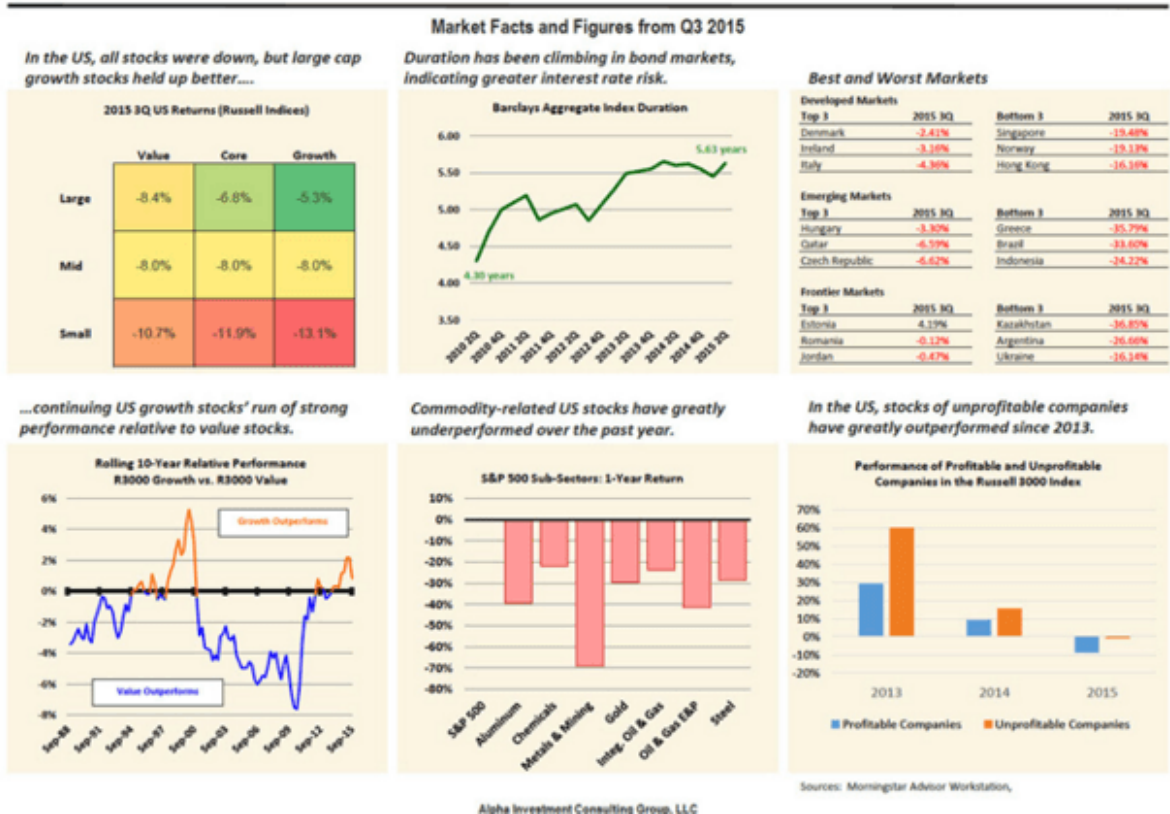
Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Data-Driven Process

Alpha Investment Consulting's data-driven process provides clients with research to help them make the best investment decisions possible. The experience and expertise of the firm's consultants and analysts give

Alpha clients the advantage of having a full and clear picture when working towards their investment goals.

MARKET FACTS AND FIGURES FROM Q3 2015



Additionally, the firm has over 25 years of experience in working with investment funds and committees through a wide range of market climates, giving Alpha a first-hand understanding of how to guide their clients through an ever-changing market environment.

Wide-Range of Services

Alpha Investment Consulting is able to provide clients with a wide range of services. These include investment policy development, asset allocation studies, manager selection and monitoring, master trustee/custodian searches, fee negotiation performance monitoring & analytics, and a variety of independent fiduciary services.

The variety present in Alpha's capabilities means that clients can have most, if not all, of their investment planning needs satisfied in a single location, which cuts down on cost and hassle.

Experience

Whether you are looking for help with retirement planning or are a foundation or endowment in need of investment planning services, Alpha has the experience and expertise needed to help you achieve your objectives.

The firm aims to create highly individualized plans for each of its clients. Through many years of experience, Alpha has gained a thorough understanding of what each type of client may need from defined contribution or benefit plans. Its consultants provide clients with a full range of services which include cutting-edge technologies, programs, and other options.

Annex Wealth Management Review

Since its beginnings in 2000, Annex Wealth Management has been focused on listening to its clients and giving them independent guidance on how to manage their wealth.

With its commitment to its clients and experienced team, Annex Wealth Management has been gaining attention as one of the best wealth management firms in Milwaukee. Recently, it landed on the list of Waukesha County's top 10 businesses and was named as one of the fastest-growing firms by *Business Journal*.

Annex's emphasis on personalized interaction and use of cutting-edge technology to create custom-tailored strategies for its clients make it an attractive source for wealth management services.

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

Experienced Team

The Annex Wealth Management team is truly enormous, with over fifty professionals, including 8 Certified Financial Planners, two Chartered Financial Analysts with experience in institutional fund management, a Chartered Retirement Plans Specialist, a Certified Investment Management Analyst, and an estate planning attorney with experience in auditing estate returns for the IRS.

The number of experienced professionals working together in a single team gives Annex Wealth Management a definite edge over its competitors.

Client Education and Events

Annex Wealth Management's commitment to transparency is evident in its dedication to educating and connecting with its clients. Every Saturday, the firm's executive team [hosts a radio show](#) called *Money Talk* where it discusses the complexities of money management. It also hosts another show called *The Annex Wealth Management Investment Show*, in which it provides viewers with a variety of investment options.

Additionally, workshops hosted in the Annex Wealth Management office help clients gain an even clearer picture of the asset management landscape. Recent workshops include A Woman's Guide to Preparing for the Unexpected, Family Wealth Preservation, Baby Boomer's Guide to Social Security & Medicare, and Women, Wine & Wealth – A "Sandwich Generation" Break.

Large Size

There are benefits and drawbacks to working with either large or small firms. The large size of Annex Wealth Management provides clients with multiple benefits, including low-cost and well-known custodians as well as years of expertise and resources not found in smaller firms. Additionally, a large size often denotes a proven track record of client success. Annex Wealth Management certainly displays this characteristic, with over \$1 billion in assets under management.

Ellenbecker Investment Group Review

Based out of Pewaukee, Wisconsin, Ellenbecker Investment Group (EIG) has a single goal: to help its clients achieve optimal lives by providing some of the best financial planning services around. Its clients include families, businesses, individuals, and charitable foundations.

Since 1996, Ellenbecker Investment Group has operated on a fee-only basis, and it maintains a policy of transparency when it comes to client interaction. The company's holistic approach to financial planning is designed to provide clients with a clear view of what is needed to create social, personal, and financial well-being.

EIG's commitment to taking the time to help each of its clients discover what is most important to him/her and its promise to be there for clients makes it one of the most personable companies on this list.

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

Code of Ethics

Ellenbecker Investment Group's clearly stated Code of Ethics can give potential clients peace of mind when it comes to the firm's fulfillment of its fiduciary duties. The guidelines that the firm follows can be summarized with the following key words: competence, integrity, objectivity, confidentiality, and diligence.

- **Competence:** The firm aims to obtain and maintain an optimal level of skills and knowledge so that it can guide clients with the highest level of confidence.
- **Integrity:** Ellenbecker Investment Group is aware of its position of trust with its clients; therefore, it promises to execute all practices with the utmost level of integrity.
- **Objectivity:** Good investors are objective investors. Ellenbecker Investment Group carries out its responsibility to disclose all facts and fees so that clients will have all of the information that they need to make objective and informed decisions. All communication between firm and client is honest, clear, and purposeful.

- **Confidentiality:** As per the above value of integrity, all client information is kept confidential at all times.
- **Diligence:** Finally, Ellenbecker Investment Group aims to provide its services in a thorough manner with constant attention to its responsibilities and commitments.

Women and Investing

A unique and potentially attractive aspect of Ellenbecker Investment Group is the fact that the office is designed to create an environment where female clients can feel comfortable discussing and managing their financial lives. In fact, nearly the entire firm comprises women, with only one man in the team.

The women-owned and run firm is dedicated to empowering women to take control of their financial well-being and succeed in life.

People-Focused Process

The core of Ellenbecker Investment Group's process is in understanding its clients as individuals. As part of its financial planning strategy, Ellenbecker promises to take as much time as needed to get to know the people it is working with so that it can ensure that each and every client receives a strategy that covers all of the bases. This people-focused process has helped the firm maintain deep relationships with many of its clients for over two decades.

The process starts with a one-hour complimentary consultation during which the situation, circumstances, needs, and goals are discussed. Fees and other details are also made clear during this meeting. Everything discussed is confidential, establishing the basis for a long-term, trust-based relationship.

If the potential client feels that EIG is a fit for him or her, then a schedule will be created which includes quarterly and yearly reviews.

Client Connection and Resource Center

Finally, Ellenbecker Investment Group has a variety of resources which signifies a commitment to and investment in its clients' overall financial education and well-being. The firm's *Money Sense* radio show and Weekly Market Update help clients stay in the loop. Additionally, Ellenbecker Investment Group offers a variety of events which are

highly relevant to modern-day financial health. Examples of recent events include Technology Series: Identity Theft, Volunteer Connection and Vision Board: Your Ideal Retirement.

The existence of such resources and events denotes a high level of involvement between the firm and its clients which can be very attractive to those who would like to have a hand in the management of their wealth.

Investors Advisory Group Review

Established in 1985, Investors Advisory Group (IAG) is devoted to helping its clients make effective wealth management decisions.

Operating on an independent, fee-based basis, IAG's clients include a blend of professionals, families, retirees, multi-generational families, and business owners. It prides itself on the fact that much of the company's growth has been through referrals, and the client appreciation social events that the company hosts shows a business that is interested in forming long and lasting relationships with the people it works for.

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

Fiduciary Duty

Investors Advisory Group acts in a fiduciary capacity, which is a common thread that connects the team and the fiduciary duty through which they operate. Fiduciary duty requires them by law, in addition to their practice principles, to put their clients' interests ahead of their own.

Here is a statement from Investors Advisory Group that encompasses the foundation upon which the firm is built:

“Doing things that are in the best interest of our clients is at the heart of how Investors Advisory Group (IAG) provides objective financial investment advice. We don't make “cookie cutter” recommendations that serve the general population. We truly believe in the importance of an advisor seeing things from

each client's perspective and customizing a plan that has both your long- and short-term goals in mind."

In addition, the firm's advisors commit themselves to staying current with financial trends, products, and practices, which helps them to make responsible decisions about their clients' investments.

Specialized Strategies

Investors Advisory Group (IAG) helps clients prepare for change through the use of individualized strategies. Whether a client is just beginning on his/her financial journey with wealth accumulation or is already far into retirement, Investors Advisory Group has the experience and expertise needed to address the client's financial plans to fit his/her needs and objectives. The firm divides the financial path into three broad categories, each with its own characteristics:

1. **Wealth Accumulation:** A person's prime earning years are 25–40. At this time, there are a variety of expenses and targets to keep in mind. Home ownership, family, travel and entertainment, educational planning, and life insurance are just a few of the factors which will impact a person's investment ability.
2. **Wealth Preservation:** Around and after retirement, the goal becomes the preservation of wealth that has already been accumulated. If all has gone well in the first step, having the retirement cash flow to enjoy one's golden years is what makes this time truly rewarding. IAG helps clients manage their cash flow to ensure the continuation of their wealth and security.
3. **The Passing of a Legacy:** Many business owners are concerned with how they will pass what they have built to future generations or to charity. IAG can help their clients ensure that their financial objectives will continue to be met long after they have moved on.

Holistic Wealth Management

One of the founding principles of Investors Advisory Group is its integration of every factor of its clients' financial lives into its comprehensive wealth strategies. This includes legacy and estate planning.

In order to prioritize an individual or family's primary goals, Investors Advisory Group focuses on the most pressing and relevant financial

categories first. The aim is to create a plan that puts clients on the path to realizing their aspirations.

The IAG Holistic Approach to Wealth Management Includes:



While developing this plan, Investors Advisory Group will walk clients through a detailed process which will develop complete confidence in future financial actions. Once goals are established, strategies are formed to help clients make the most of their financial planning sessions.

Investors Advisory Group’s team has over 200 years of combined wealth management and financial planning experience which they use to their clients’ advantage. Additionally, the team works in conjunction with accounting and legal professionals when needed.

Portfolio GPS

One of the tools Investors Advisory Group uses is called Portfolio GPS. This streamlined process helps the firm form customized investment strategies for its clients with minimum guesswork and hassle. Portfolios follow each client’s goals and vision as well as his/her risk tolerances.

The objective of Portfolio GPS is to maintain diversified and risk-appropriate portfolios by sticking to the guidelines formed by each client’s GPS profile.

At quarterly meetings, IAG's Investment Committee monitors clients' portfolio allocations and holdings and will recommend changes when certain investments no longer fit the needs and specifications of a client's GPS.

Investors Advisory Group disclosure: Securities offered through LPL Financial. Member FINRA/SIPC, Investment advice offered through Investors Advisory Group, LLC, a registered investment advisor and separate entity from LPL Financial.

Landaas & Company Review

Advising and managing over \$2 billion on behalf of thousands of clients, Landaas & Company makes it on this list of top financial planners in Milwaukee due to its far-reaching experience in the markets and commitment to fulfilling the objectives and needs of individual investors.

Landaas & Company's independent status ensures clients that no interest is placed above each client's own financial goals and life dreams. Additionally, the firm's community involvement, pledge to employee satisfaction, and clear track record create the image of a firm that is reliable and ethically conscious; two very important factors when it comes to financial planning and wealth management.

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

Academic Approach

Landaas & Company utilizes an academic approach on behalf of its clients to create balanced and customized portfolios. These portfolios include everything from mutual funds to stocks, bonds, and other assets that are both domestic and international.

The vehicles recommended by the firm are funds with steady performance and that are managed by proven professionals. Using the team's expertise and experience in finance and economics, Landaas & Company provides its clients with portfolios designed for lower risk and

consistency in performance. These portfolios are continuously monitored to ensure that client goals and expectations are being met.

The motto for Landaas & Company's investment strategy is "steady wins the race."

Simple New Client Process

In addition to its academic approach, another great thing about Landaas & Company is that the firm makes it easy to get started. The new client process consists of a few simple steps.

- Give the company a call or an email indicating that you would like to know more about its services.
- Meet with an advisor at a free consultation. During this meeting, the advisor will develop a comprehensive view of who you are as well as what you want and need.
- Attend follow-up meetings to clear up any lingering questions and complete paperwork.
- Maintain a long and profitable relationship during which the firm will continue to check up on your understanding of investments, your risk tolerance, and a variety of other factors which will help Landaas & Company develop your very own financial roadmap.

Client Tools and Education

Few firms invest as much in client education as Landaas & Company. The [Money Talk](#) page is a culmination of over 35 years of public education and outreach initiated by Bob Landaas, the president of the company.

Money Talk with Bob Landaas is an audio webcast occurring weekly in which the latest economic trends and financial news are discussed by members of the Landaas team. Videos, articles, and other features provide additional information.

Marietta Review

Founded in 2000, Marietta prides itself in being a 100% employee-owned independent investment advisor. Its focus on individual attention to client needs, and team-based strategies are what makes it one of the top Milwaukee financial advisors.

Marietta's clients include individuals, families, and institutional clients. The firm's expert team provides personalized service to each client, looking out for the client's best interests, and delivering proven results by helping clients build their wealth.

The company's individual focus and collaborative point of view is what puts it on this list of top financial advisors in Milwaukee.

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

Customized Solutions

Marietta custom-designs its investment programs after careful examination of its clients' goals and circumstances. A large variety of factors are taken into account, with an individual's investment timeline being just one of them. While some firms stuff their portfolios with a large number of things, Marietta strives to create the best portfolios through a select number of securities; something which really puts the spotlight on its commitment to customization.

Focused Approach

Marietta provides its services to clients with a variety of different financial goals (growth of wealth, production of income, preservation of capital, etc.); however, its approach is the same: provide individualized attention and service, understand each client, and help the client reach his/her investment objectives while simultaneously meeting expectations and reducing risk.

Experience-Driven Strategy

Marietta's equity investment philosophy includes the following principles:

- All-inclusive risk management practices
- A wide-ranging macroeconomic viewpoint focused on identifying key drivers and sustainable trends
- The belief that the ever-changing global economy requires optimal diversity
- Confidence that the ability to invest unimpeded by traditional benchmark weightings and exposures enables greater portfolio flexibility and success

Team-Based Support

Marietta portfolio managers work closely with their clients who are also supported by a team of administrators and analysts. This team-centered approach allows for maximum communication between clients and the firm.

McCarthy Grittinger Financial Group Review

Founded in 1995, McCarthy Grittinger Financial Group has grown to become one of the top fee-only investment advisory and financial planners in Milwaukee and in all of southeastern Wisconsin. It provides independent financial planning and investment advisory services for a variety of individuals and families, with a primary focus on continuous investment supervision based on a framework of financial planning.

Other services include counsel in the following areas: estate planning, tax, retirement, and insurance.

McCarthy Grittinger Financial Group currently manages over \$200 million in assets and serves 223 clients across 19 states. Its motto to help clients manage financial anxiety makes it a firm that anyone who is keen on creating and maintaining financial health should look into.

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

Wide Range of Expertise

McCarthy Grittinger Financial Group offers a wide range of services:

- Investment supervision
- Market analysis
- Financial planning
- Tax planning
- Estate planning
- Retirement planning
- Portfolio management
- Educational advice
- Informational seminars
- Investment supervision

The firm's financial planning approach is holistic, taking into account matters beyond investments. Tax and estate are common alternative areas where McCarthy Grittinger advisors offer professional advice.

Focus on Trust

McCarthy Grittinger Financial Group aims to build long-term personal relationships with its clients. A large part of this relationship is built on trust. The firm emphasizes its belief in integrity as well as the importance it places on its fiduciary responsibilities.

The fee-only status of the firm helps with this picture of deep and trusting client-firm relationships as does its transparent investment strategy. The firm clearly states that it customizes investment portfolios using the following investment options: mutual funds, ETFs, U.S. Treasury securities, and its own select set of hand-chosen investment options. McCarthy Grittinger does not use illiquid securities or private placements.

Commitment to Communication

In keeping with the firm's motto of alleviating its clients' financial security, McCarthy Grittinger is committed to keeping its clients educated and in the loop. Regular e-newsletters help to do this. Topics covered include:

- Changes in the financial world
- Market updates
- Company news
- Tax issues

Its large and well-equipped Learning Center and Tools and Information Center allow for easy access to additional information.

NorthStar Asset Management Review

Having advised clients on the management of over \$655 million in assets and with portfolio managers displaying an average of over 40 years of experience, NorthStar Asset Management is one of the top investment advisory firms in Milwaukee due to the expertise and experience of its small and energetic team. The firm's clients include private individuals, institutions, corporations, and foundations.

Its independent status and flexible investment strategy provide clients with a service that is focused and skillful. This, combined with the firm's commitment to creating specific strategies to fit each client's circumstances, objectives, and risk tolerance, makes NorthStar Asset Management one of the most adaptable services on this list.

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

Flexible Strategy

NorthStar Asset Management endeavors to maintain openness to new and emerging market opportunities. This sets it apart from some other firms in the industry which have taken to defining their strategies in rigid terms. The flexibility seen in NorthStar's strategy can provide an advantage to clients as it positions the firm to capitalize on the ever-changing nature of the markets.

Additionally, NorthStar's flexibility extends to the individualization of its portfolio. The firm takes into account client risk tolerances and situations in order to determine allocation; something which may help clients to make better progress towards their goals in the long run.

Long-Term Focus

NorthStar Asset Management is focused on long-term goals. The industries that it chooses have long-range positive growth trends, and the firm's investment strategy leads it to companies that display both industry leadership and ongoing innovation.

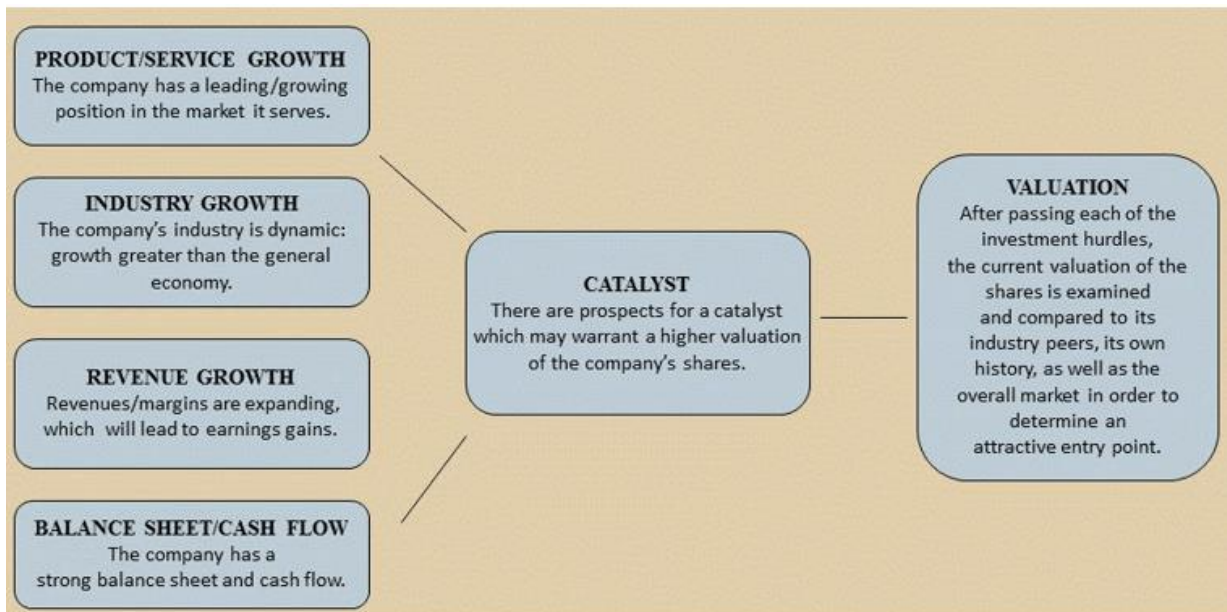
Commitment to Clients

NorthStar provides its clients with quarterly reports containing detailed information on the valuation, activity, and performance of their portfolios. Meetings can be set-up according to each client's needs, and portfolio managers make it their priority to be available to provide assistance or answer questions about a client's overall financial picture.

An outstanding feature of NorthStar is that the firm prides itself on its long-term relationships with its clients, which it strives to build through superior performance and excellent service.

Transparent and Broad-Range Investment Process

NorthStar maintains its portfolio performance by adhering to a strict stock selection process outlined in the diagram below:



Within this singular strategy, the firm's portfolio managers express their unique perspectives. This provides clients with a nice and wide range of exposure to equities with the basic characteristics of value and growth yet which range across big-cap, mid-cap, and small-cap classes. Client exposure also includes international and domestic securities, alternative vehicles, and fixed income. This diversity can lower the risk involved in investment portfolios.

PJS Investment Management Review

As a fee-only Registered Investment Advisor based out of Cedarburg, PJS Investment Management achieves its objective of helping its clients meet future and current cash flow needs by following a five-pronged investment philosophy:

- Personalized attention and service
- Tailored and tactical discipline
- Performance-focused and independent thinking
- Tax efficiency
- Mindfulness of costs

The firm's commitment to keeping clients updated on their portfolios and on market trends makes PJS Investment Management an optimal choice for those who want to maintain a clear picture of their finances at all times.

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

Wide Range of Services

PJS Investment Management's services include investment management, financial planning, tax planning, cash flow planning, insurance planning, and estate planning. The firm's expertise and experience are made evident through the streamlined processes available for each service.

Here are the processes for investment management, financial planning, and tax planning:

Investment Management Process:

1. Discuss expectations, tolerance for risk, and the timeline.
2. Review and analyze existing financial circumstances.
3. Develop individualized, tax-conscious investment suggestions, and prepare the Investment Policy Statement (IPS) delineating objectives and a strategy.
4. Build a tailored and strategic investment portfolio.
5. Continually review and adjust the portfolio according to opportunities and environment.

Financial Planning Process:

1. Develop an all-inclusive view of finances.
2. Form present and future financial objectives.
3. Provide custom-tailored advice in all areas of personal finance and refer to experts in complementary fields when needed.

Tax Planning Process:

1. Review tax returns.
2. Work with the client's accountant or recommend one.
3. Inform the client of alterations in tax law that may affect the client's plans.
4. Track cost basis and deliver annual summaries to alleviate the headache of tax preparation.

Clear Investment Strategy

The primary emphasis of PJS Investment Management's investment process is controlling risk through diversification. The firm has a clear strategy based on time-tested principles.

These are some of the things that the firm looks at when making individual stock selections:

- Leading market positions for its products and services
- Strong management team with a clear vision and action plan for the future
- Hardy financial position with satisfactory liquidity reserves
- Essential services or products whose demand continues even in slow-growth economic atmospheres

- Operation in countries with a steady political environment and promising growth prospects as well as in an industry poised for long-term growth
- Attractive dividend yield and possibilities for continued dividend growth

Additionally, the firm reduces risk in its bond portfolios by looking for the following criteria:

- The issuer has robust finances, a stable outlook, and a good credit rating and is not likely to be embroiled in adverse political or economic developments.
- The issuer provides an attractive, satisfactory return and after-tax return, with a maturity that limits market risk from inflation and interest rate expansion.

Selection of Client Resources

In addition to a clear investment strategy, PJS Investment Management has a variety of client resources that further help the firm to create an environment of transparency. These resources include:

- Client education videos
- Market watch
- Industry news
- Calculators

All of these resources come from credible third-party providers.

Spectrum Investment Advisors Review

Incorporated in 1995, Spectrum Investment Advisors, Inc. operates on the premise that simple access to the investments and services, suitable research, and unbiased financial advice can help clients achieve their financial goals. The firm's motto, "[Colors Simplify Investing®](#)," refers to a unique client education process as well as the company's ability to communicate across a range of backgrounds and industries.

Spectrum Investment Advisors utilizes color-coded materials to empower its clients with information that can help clients feel confident about their financial futures and investment portfolios.

Based out of Mequon, Wisconsin, the firm makes it onto this list because of its simple yet individualized financial planning and wealth management processes.

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

Retirement Planning Services

Spectrum Investment Advisors, Inc. has a passion for retirement planning. During one-on-one consultations, Spectrum Investment Advisors will review with an individual his/her comprehensive financial picture. After taking into account everything from family personal holdings to a spouse's retirement investments, the firm provides financial recommendations on retirement plan assets with the client's long-term financial well-being in mind.

Spectrum Investment Advisors' retirement planning process is simple, holistic, and individualized, making it an attractive option.

Client-Specific Wealth Management

Spectrum Wealth Management's focus on integrity and individual needs creates a service whose end goal is to help each client build a customized portfolio which fulfills his/her needs, goals, and dreams for the future.

The firm utilizes a standardized process, called the Spectrum Investor® Fund Monitoring Scorecard™, to review and manage assets with client interests in mind.

Awards and Experience

Although public recognition is only one factor of success, third-party approval can serve as an indication of good service. Spectrum Investment Advisors has won a variety of awards in recent years:

- Mequon-Thiensville Chamber of Commerce Business of the Year for 2015
- 2015 401(k) Advisor Leadership Award Nomination

- 2014 PlanSponsor Retirement Plan Adviser Team of the Year Finalist

The firm's awards and experience (an average of 25 years of experience within the team) clears up any possible question of Spectrum's capability to provide reliable advice and good service.

Conclusion – Top 10 Financial Advisors in Wisconsin (Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon)

Now that you have read a list of top financial advisors in Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon, you should be better prepared to answer these questions:

- Where can I find the best financial planning, wealth management, and asset management services in Milwaukee?
- Where should I go if I am looking for additional services like estate planning, tax management, and risk management?
- What types of fees do financial planners in Milwaukee charge, and which financial advisor is best for me?

In reality, the answer to the question of which financial advisor or wealth manager in Milwaukee is the best is entirely subjective and will depend on your individual goals, needs, and desires.

The next step to take is to choose three to five firms from the list that seem to best suit your needs and set up appointments to meet the advisors. After that, you will have all of the information you need to make an informed decision and make yet another step towards your financial target.

If you have questions, comments, or tips about this "Top 10 Financial Advisors in Wisconsin (Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon)" 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

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