

# **Top 13 Financial Advisors in Ohio | 2017 Ranking | Ohio Wealth Management Firms**

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## **2017 RANKING & REVIEWS TOP RANKING BEST FINANCIAL ADVISORS IN OHIO**

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### **Finding a Top Financial Advisor in Ohio**

Ohio is one of the most populous states in the country. This makes the already difficult job of finding a financial advisor in Ohio even trickier. Knowing what you want in an Ohio financial advisor and knowing what you need from your money can make the selection process much easier.

There are several financial advisors in Ohio. Spending hours reviewing search engine results for "best wealth management firms in Ohio" is probably not your idea of a good time. Fortunately, we've done the research and used our specific ranking methodology to present you with thirteen of the best firms in Ohio.

You work hard to earn your money. With the extra effort it takes to find a suitable financial advisor in Ohio, you can protect and grow that income for the years to come.



*Award Emblem: Top 13 Best Financial Advisors in Ohio*

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## **AdvisoryHQ's List of the Best Top 13 Financial Advisors in Ohio**

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

- [Beacon Financial Partners](#)
- [Budros, Ruhlin & Roe, Inc.](#)
- [Carnegie Investment Counsel](#)
- [Cornerstone Capital Advisors](#)
- [Fairport Asset Management](#)
- [Foster & Motley](#)

- [Hamilton Capital Management](#)
- [Johnson Investment Counsel Review](#)
- [MAI Capital Management](#)
- [OJM Group Review](#)
- [Spero-Smith Investment Advisers](#)
- [Summit Financial Strategies](#)
- [Truepoint Wealth Counsel](#)

## Top 13 Financial Advisors in Ohio | Brief Comparison

Financial Advisors in Ohio	Highlighted Features
Beacon Financial Partners	Advanced Wealth Strategies
Budros, Ruhlin & Roe, Inc.	Education Funding Planning
Carnegie Investment Counsel	Retirement Plan Services
Cornerstone Capital Advisors	Fiduciary Assessments
Fairport Asset Management	Comprehensive Wealth Management
Foster & Motley	Extensive Financial Planning Services
Hamilton Capital Management	In-house Research
Johnson Investment Counsel, Inc.	Trust Services
MAI Capital Management	Advice for Professionals and Entrepreneurs
OJM Group, LLC	Online Bookstore
Spero-Smith Investment Advisers	Careful Manager Selection
Summit Financial Strategies	Helpful Resources Page
Truepoint Wealth Counsel	Risk Management

*Table: Top 13 Best Financial Advisors in Ohio | List is sorted alphabetically*

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## 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.

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## Detailed Review – Top Ranking Financial Advisors in Ohio

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

**See Also:** [Top Financial Advisors in Dallas, TX | Ranking | Dallas Area Wealth Managers](#)

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## Beacon Financial Partners Review

[Beacon Financial Planners](#) is a wealth management firm in Cleveland, Ohio that offers clients [conflict-free advice](#) free from the problematic ties to proprietary products or investments. Their goal is to help individuals gain clarity and direction about their finances. As an independent firm, they do not answer to stockholders or a company parent.

Beacon Financial Partners is a [fee-based](#) wealth management firm in Ohio. While we typically focus on fee-only advisors, we have included them on our list for the range of services they provide.

## **Goal-Based Financial Planning**

The wealthier you are, the more complex your finances get. But they don't have to be that way. In fact, that complexity may bite you in the behind if you do not take the time to understand it and make it work for you. A financial advisor in Ohio at Beacon Financial Partners can help you cut through the noise to carefully work towards your goals.

This goal-based financial planning at Beacon Financial Partners consists of [specific services](#) that include:

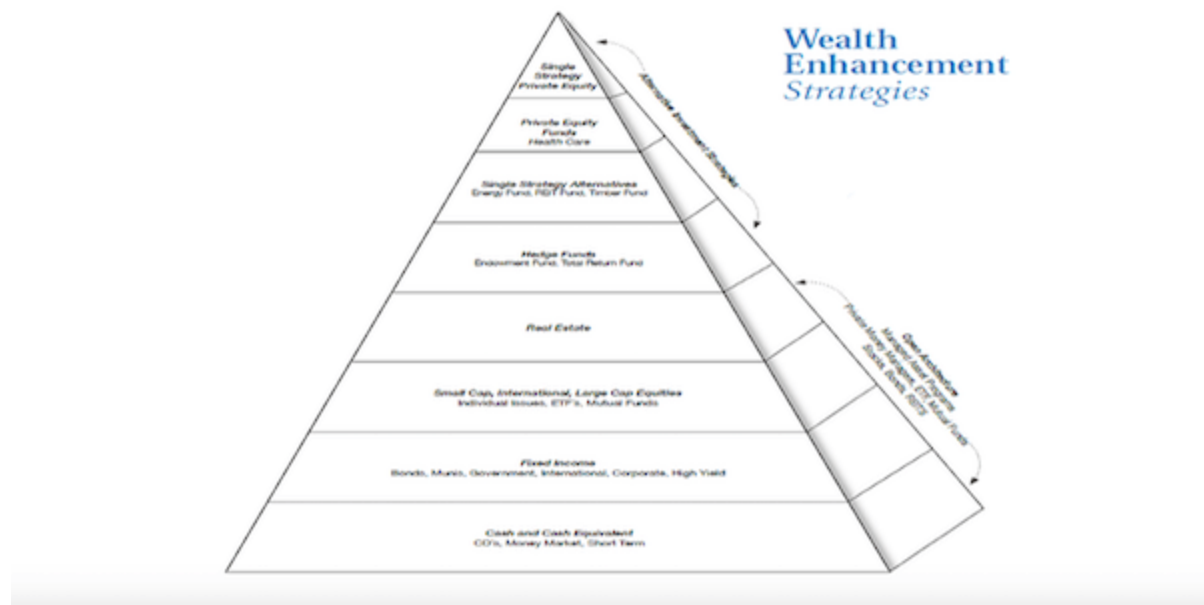
- Cash management
- Retirement planning
- Investment planning
- Funding a college education
- Insurance planning
- Risk management
- Estate planning
- Tax planning

Working with an Ohio financial planner to address all of these components of a financial plan can guarantee a healthy financial future.

## **Advanced Wealth Strategies**

A financial plan can do wonders for your money management, but sometimes more involved assistance is needed, especially when it comes to growing your wealth. This wealth management firm in Ohio can work with clients to implement specific [wealth enhancement strategies](#).

This kind of planning can tackle multiple areas and use different financial instruments to enhance wealth. Cash and cash equivalents serve as the foundation for this kind of wealth enhancement before moving up to fixed income assets, equities, real estate, hedge funds, and more.



## Corporate Retirement Planning

This financial advisory firm in Ohio brings the same strategic planning they use for their individual financial planning to their corporate planning. Their team of qualified professionals works together to bring corporate clients excellent retirement plans that incorporate the best interests of the employers and the employees.

These financial advisors in Ohio help employers set up qualified and non-qualified retirement plans. They offer a range of services and address the unique needs of each client. Their suite of [corporate retirement planning services](#) includes:

- Investment due diligence
- Vendor selection
- Financial education and planning
- Plan benchmarking
- Plan design consulting
- Fiduciary compliance

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# Budros, Ruhlin & Roe Review

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[Budros, Ruhlin, & Roe](#) is an independent wealth management firm located in Columbus, Ohio. It has been recognized in publications including Forbes, Fortune, and the Wall Street Journal. Currently, this Ohio financial advisory firm has over [\\$1 billion](#) in assets under management.

Budros, Ruhlin & Roe is a [fee-only](#) wealth management firm in Ohio.

## **Risk Management and Asset Protection Strategies**

With the assistance of the firm's proprietary process, The Risk Management Assessment™, these financial advisors in Ohio can readily determine the amount exposure each client faces. This includes analyzing whether clients need more insurance and protection. A client may be lacking quantity (i.e. a life insurance policy that is too small) or variety (i.e. a client may need to look into disability insurance).

Risk is a difficult thing to measure on your own. You want to protect yourself, but you also do not want to go broke insuring yourself against anything and everything. A financial advisor in Ohio can help you strategically protect yourself.

The good news is that as a fee-only wealth management firm, Budros, Ruhlin & Roe does not sell any insurance products. They simply help you determine whether you need to purchase insurance.

This wealth management firm in Ohio is also [independent](#), which means they are not obligated to recommend specific products. As a result, clients of this firm can rest assured that their Ohio financial advisor is making recommendations with their best interests in mind.

## **Education Funding Planning**

It may seem like education planning is as simple as mom or dad siphoning some money away every month, but things can be more complicated (or creative!) than that. In those instances, a wealth management firm in Ohio like

Budros, Ruhlin & Roe can help clients design traditional and non-traditional [education funding plans](#).

So what on earth is an example of a non-traditional or creative education funding plan? Well, this financial advisory firm in Ohio describes one situation in which a child's education was funded by someone who was not a parent.

By working with an Ohio wealth management firm, they could set things up so that the person funding the education savings could reduce their personal estate taxes, ensuring benefits for all parties involved.

### **Philanthropic Planning and Strategies**

This wealth management firm in Ohio also helps clients with their philanthropic planning. On an individual level, they can help clients work their charitable wishes into their legacy and estate planning. They can also help individuals who are currently closely involved with philanthropic organizations. This Ohio financial advisory firm can help with:

- Private foundations
- Donor-advised funds
- Planned giving
- Charitable trusts

***Don't Miss:*** [Best Financial Advisors in New York, NY | Ranking | New York Wealth Management Firms](#)

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## **Carnegie Investment Counsel Review**

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[Carnegie Investment Counsel](#) is a wealth management in Ohio that has been provided financial advice for individuals and businesses [since 1974](#). They are committed to providing their clients with expert guidance in good times and bad and providing a comfortable and satisfying advisory experience.

Carnegie Investment Counsel is a [fee-only](#) wealth management firm in Ohio.



## Custom Portfolio Management

One big mistake that financial advisors in Ohio and elsewhere make is using a one size fits all approach to wealth management. Each client's financial situation and goals are unique, which means their portfolio should be distinctive as well.

Carnegie Investment Counsel is a wealth management firm in Ohio that prioritizes providing custom portfolio management services for its clients. They do this by emphasizing the human element of financial advice. This means taking the time to actually listen to their clients and understand what they are looking for in order to meet emotion-based needs with expert advice.



Their [principal investment philosophy](#) consists of the following elements:

- Determine proper asset mix for everyone
- Diversify among macro sectors
- Determine appropriate position sizes
- Focus on profitable companies with best prospects for growth

- Keep transaction and other costs low
- Manage for tax efficiency wherever possible

## **Retirement Plan Services**

Providing retirement benefits to employees is a complicated matter to begin with, and recent legislation from the Department of Labor has increased the responsibilities of business owners who provide retirement plans.

Carnegie Investment Counsel is a wealth management firm in Ohio that can provide tailored 401(k) plans for businesses as part of the [retirement planning services](#) they offer. This financial advisory firm in Ohio will serve as your fiduciary and ensure that everything about the retirement plan you offer your employees is DOL-compliant.

This Ohio wealth management firm's retirement planning service is focused on three key areas:

1. Plan Design
2. Plan Governance
3. Participant Success

Focusing on these three areas ensures this wealth management firm in Ohio builds a proper relationship with the employer, understands their needs, and works diligently towards crafting a plan that leaves the employer and their employees happy.

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## **Cornerstone Capital Advisors Review**

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[Cornerstone Capital Advisors](#) has been providing financial planning and investment management services [since 1984](#). They help clients address all areas of wealth management including asset protection, cash flow planning, debt management, and more.

Cornerstone Capital Advisors is a [fee-only](#) wealth management firm in Ohio.



## **Integrated Investment Strategy**

A holistic approach to financial planning is the smartest approach. Financial planning is about making your money align with your goals so that you can successfully achieve them.

This means that everything from the stage of our life (i.e. working vs. retirement), your passive income (i.e. assets and investments), and even your health (i.e. insurance) are all factors that need to be considered when an Ohio wealth management firm crafts you a financial plan.

Cornerstone Capital Advisors values this [puzzle-piece approach](#) to financial planning. It's an approach that makes sure all of the pieces fit together in the end, and that different areas of your plan work in harmony with each other.

While individuals are working, their financial focus is on wealth accumulation. A financial advisor in Ohio from Cornerstone Capital will discuss goals, wealth enhancement, protection and transfer strategies, and tax minimization strategies.

When it comes to a retiree, this Ohio financial planner will discuss tax efficient retirement solutions, social security, IRA withdrawals, legacy planning, and more.

## **Fiduciary Assessment**

Employers providing retirement plans have an extra level of responsibility when providing investment plans for their employees. This can add an extra

level of stress for business owners who want to do what's best for their employees, but aren't exactly sure what their responsibilities are.

This wealth management firm in Ohio offers [fiduciary assessments](#). This means the firm reviews employer-sponsored retirement plans to check that they are compliant with the federal ERISA statute.

This Ohio wealth management firm performs assessments on:

- Participant Directed Plans
- Profit Sharing Plans
- Defined Benefit Plans
- Endowments
- Non-Profits

### **Reference Materials**

To keep its clients well-informed, this wealth management firm in Ohio offers a page of [reference materials](#) on topics like interest rates and retirement plan deferral limits.

***Related:*** [\*\*Best Financial Advisors in Austin, TX | Ranking | Top Austin Wealth Managers & Planners\*\*](#)

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## **Fairport Asset Management Review**

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Founded [in 1963](#), [Fairport Asset Management](#) has been providing financial advice for more than half a century. This wealth management firm in Ohio was originally named Roulston & Co. before a merger with The Hickory Group in 2001 which resulted in the present day Fairport Asset Management.

Fairport Asset Management is a [fee-only](#) wealth management firm in Ohio.

### **Clear Core Values**

Fairport has a clear understanding of what makes it stand out from other wealth management firms in Ohio. Most financial advisory firms have educated and experienced individuals, so oftentimes deciding on one comes down to assessing the core values.

Fairport Asset Management outlines its [core values](#) as:

- Respect
- Discipline
- Resolve
- Accountability

It doesn't matter how experienced a financial advisor in Ohio is - no one likes to be patronized to or shot down. Fairport prioritizes fostering a collaborative relationship with its clients that focuses on listening to their ideas.

They promise discipline in their selection methodology and decision-making processes regarding your money and resolve when it comes to pursuing the best outcomes for clients.

Finally, and perhaps most importantly of all, they promise accountability to regularly reviewing practices and outcomes in order to remain one of the best financial advisory firms in Ohio.

### **Open Architecture Firm**

One of the benefits of working with a fee-only firm is knowing the advisor's success (and the firm's success) is tied to your success. Fee-only firms take their compensation as a percentage of the assets they manage for you, not via compensation for pushed products. As a result, an Ohio wealth management firm like Fairport is incentivized to keep you happy with suitable, low cost investments that will grow the assets they manage for you.

Additionally, this firm is [independent](#), which means they do not answer to a parent company. Any experts or third parties consulted by this wealth management firm in Ohio is done so free from any remuneration.

### **Comprehensive Wealth Management**

Clients of this wealth management firm in Ohio receive an integrated plan that incorporates all elements of their financial life using the expert knowledge of Certified Financial Planners, Certified Public Accountants, and Chartered Financial Analysts on the team.

The [wealth management services](#) offered by Fairport Asset Management include:

- Net-worth and cash flow planning

- Investment planning and portfolio management
  - Tax planning
  - Insurance planning and risk management
  - Benefits planning
  - Estate planning and asset protection
  - Philanthropic planning
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## Foster & Motley Review

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[Foster & Motley](#) boasts a highly skilled team of Certified Financial Planners, Certified Public Accountants, and Chartered Financial Analysts. Their [team](#) also includes members with advanced degrees, which should assure clients that their money is in capable hands.

Foster & Motley is a [fee-only](#) wealth management firm in Ohio.

### **Extensive Financial Planning Services**

This wealth management firm in Ohio offers a range of financial planning and wealth management services. Foster & Motley's approach to wealth management focuses on learning about the client and using a disciplined process to compile a customized portfolio.

These financial advisors in Ohio stick to a consistent investment philosophy which emphasizes income, value, and quality. They can help clients in the following [areas](#) of financial planning and wealth management:

- Retirement Planning
- Tax Planning
- Estate Planning
- Portfolio Creation & Management
- Insurance Planning
- Cash Flow Planning
- Wealth Optimization
- Net Worth Analysis
- College Planning
- Money Movement
- Charitable Gifting

- Stock Option Planning

## **Independent Status**

This wealth management firm in Ohio is a Registered Investment Advisor (RIA). This means that they are held to a fiduciary standard and are legally required to put their clients' interests before their bottom line.

They are required to alert their client to any conflicts of interest, whether it crops up before a relationship begins or during the advisory process.

The fact that this is a fee-only firm is further reassurance that this firm's success is tied to each client's success.

## **Innovation and Continuing Education**

The financial industry is a very dynamic industry. Factors that are legal and political, domestic and international can have an impact on an individual's financial planning and investment strategy.

As a result, it is important for one's wealth management firm in Ohio or elsewhere to foster a culture of continuing education and learning.

Foster & Motley is a financial advisory firm in Ohio that does just that. Not only do they regularly review their processes to check that they are up to date, but they encourage their employees to keep themselves updated as well.

They invest in the education of their employees and require all of them to have completed (or be in the process of completing) a professional certification.

**Popular Article:** [\*\*Best Financial Advisors in Seattle, Bellevue, & Kirkland WA | Ranking | Seattle Area Wealth Management Firms\*\*](#)

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# **Hamilton Capital Management Review**

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[Hamilton Capital Management](#) positions itself as its clients' "Chief Investment Officer and external investment department". They help their clients build and preserve their wealth. As a Registered Investment Advisor in Ohio, they do so while putting their clients' interest before the firm's profit.

Hamilton Capital Management is a [fee-only](#) wealth management firm in Ohio. Their only [source of revenue](#) comes from the fees paid by their clients.

### **Analysis of Asset Allocation**

This wealth management firm in Ohio [applies fundamental analysis](#) to different asset classes in an effort to look beyond the present and make educated guesses about the attractiveness of a particular asset class six to twelve months into the future.

This approach differs from the traditional approach used by wealth management firms. Rather than using static asset allocation models, this financial advisory firm in Ohio uses a more dynamic process. Their advisors adjust the portfolio's asset allocation depending on any changes they discover after conducting their analysis of various asset classes.

This ensures that both the quantitative *and* the qualitative factors are taken into consideration.

### **Emphasis on Price**

You won't find a discussion of "price" on the website of many wealth management firms in Ohio and across the country, but it's an important topic to address. As Hamilton Capital Management [puts it on their website](#), "Investing is about capturing the future cash flows of an investment at an attractive price...What you pay is everything."

They understand the importance of getting a great price. The Ohio financial advisors at Hamilton go the extra mile to understand the dynamic between current price and future cash flow to help realize the best returns at the lowest cost for their clients.

### **Research-Driven Outlook**

An investor that is parking their money with a wealth management firm in Ohio wants to know that it is not a glorified gambling house. Hamilton Capital Management does not take shortcuts. This firm conducts in-house research to understand the markets, conduct thorough analysis of assets, and come up with solid models that can assist its team of Ohio financial advisors to build the best portfolios for its clients.



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# Johnson Investment Counsel Review

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[Johnson Investment Counsel](#) holds the title of being Ohio's largest independent wealth management firm. That's quite a feat for the firm which has been in business [since 1965](#). Its founder, Timothy E. Johnson, combined academic research in security analysis and portfolio management with his commitment to helping people to establish a thriving financial advisory firm in Ohio.

Johnson Investment Counsel is a [fee-only](#) wealth management firm in Ohio.

## Family Office Services

This wealth management firm in Ohio helps families come up with intelligent game plans for their wealth. They help high net worth families devise strategies for protecting their wealth and establishing a legacy.

But [Family Office](#) services are not just related to the technical elements of wealth management like financial planning and investing. It's also about learning how to handle the complexities of wealth as a family. Family values and individual opinions can often clash, and this financial advisory firm in Ohio can help clients with family governance issues.

This service is provided for individuals and families with a net worth of at least [\\$10 million](#).

## Trust Services

A large part of your legacy will be providing for your family long after you are gone. You may want to provide general income for them to live on or funds specifically meant for them to buy a home or go to school.

A wealth management firm in Ohio can help families manage the transfer and preservation of wealth between generations. Johnson Investment Counsel offers [specialized trust services](#) for individuals, charitable organizations, foundations, endowments, and retirement plans.

This wealth management firm in Ohio lays out the [benefits of creating a trust](#), which include:

- Managing the transfer of wealth to the next generation or to a charity
- Avoiding probate court
- Reducing gift and estate taxes
- Special needs planning (i.e. a special needs trust)
- Charitable gift planning
- Asset protection

## **Institutional Management**

It's not just individuals who need help with portfolio management and investment strategy. Institutions require this kind of expert advice as well. This wealth management firm in Ohio offers the kind of consistency and continuity that large institutions needs.

Despite internal turmoil or changes in board members, Johnson Investment Counsel can serve as a guiding light with consistent, dependable investment advice that is backed by research, expertise, and experience.

***Read More:*** [\*\*Best Financial Advisors in Portland, OR | Ranking | Portland Wealth Management Firms\*\*](#)

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# **MAI Capital Management Review**

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[MAI Capital Management](#) consists of a team of financial advisors, planners, and tax professionals who work together to provide comprehensive and integrated financial plans for its clients. They offer financial consulting, investment management, and family office administration.

MAI Capital Management is a [fee-based](#) wealth management firm in Ohio. We have included them on our list for the range of services that they provide.

## **Services for Professionals and Entrepreneurs**

Highly skilled professionals and entrepreneurs invest a lot into their future purchasing power. For professionals, this comes in the form of advanced

degrees and technical education. For entrepreneurs, this may be taking risks with their hard earned and diligently saved money.

MAI is a wealth management firm in Ohio that helps clients by providing thoughtful financial planning and wealth management strategies [for professionals and entrepreneurs](#). These Ohio financial advisors also help with estate planning and tax planning.

This financial advisory firm in Ohio also helps by creating custom strategies that are based on the specific profession or field a client is working in.

### **Step-by-Step Financial Planning**

This wealth management firm in Ohio offers [step-by-step financial planning](#) for individuals and families. The financial industry is complex and it is jam-packed with confusing jargon. A financial advisor in Ohio can help clients cut through all of the noise.

MAI's financial planners in Ohio take clients through a step-by-step process of financial planning to make sure they totally understand the goals they are working towards.

Discovery & Planning: The advisor listens to the client's needs, figures out what their risk tolerance is, and starts outlining appropriate courses of action.

Implementation: They come up with a strategic way to make all the elements of your plan work together smoothly.

Monitor & Review: The team meets regularly to provide you with updates and ensure that everything is on track and proceeding as planned.

### **Multigenerational Family Services**

Helping families with their wealth management needs is the foundation upon which MAI Capital Management was built. The Ohio financial advisors at MAI Capital Management are capable of serving families in the [following areas](#):

- Family Office Administration
- Financial Consulting
- Investment Management
- Tax Planning & Compliance
  
- Estate Planning

- Education for the Next Generation
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## OJM Group Review

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[OJM Group](#) is a financial advisory firm in Ohio that certainly keeps itself busy. Their team serves [over 1,000 clients](#) across 47 states. In addition, they've written several books on financial planning and wealth management. Their consistent commitment has been helping clients build their wealth, preserve their assets, and reduce taxes.

OJM Group does not explicitly say whether it is a fee-only or fee-based wealth management firm in Ohio. They do say that they do their planning on a [flat-fee basis](#). As always, we advise readers to verify a firm's compensation structure before starting a working relationship.

### **Multidisciplinary Consulting Services**

This wealth management firm in Ohio provides multidisciplinary consulting services for several financial areas in both the personal and business arena. They also provide a 100% refund for clients if their advice does not result in [200% of its fee in quantifiable benefits](#). Talk about a money-back guarantee.

They have developed an in-house planning system that has benefit clients across the country. These financial advisors in Ohio have either helped clients with one area of their finances or provided comprehensive, all around service for their needs by working with other professionals in their lives like attorneys and accountants.

### **Independent, Registered Investment Advisor**

OJM Group is an independent, Registered Investment Advisors in Ohio. The structure of this wealth management firm in Ohio is set up so that they are not compelled or obligated to steer clients in the direction of a parent company's products or portfolio models.

This means that as the wealth of clients grow, they do not have to worry that their financial advisor in Ohio is out to fatten up their profit margins with

biased advice. They can comfortably receive the advice they need to address the increasing complexity of their finances.

## **OJM Bookstore**

As we mentioned earlier, OJM is a wealth management firm in Ohio that has published several books on the topics of financial planning and wealth management. The principals of this firm used their expertise to put together easy-to-read books on different areas of financial planning, and offer these books for sale through their [website](#).

Their titles include:

- For Doctors Only: A Guide to Working Less & Building More
- Fortune Building for Business Owners & Entrepreneurs: The Keys to Corporate Structure, Tax Reduction, Asset Protection and Wealth Creation
- For California Doctors: A Guide to Asset Protection, Tax and Estate Planning
- Wealth Protection Planning for Dermatologists

As you can tell from these titles, their books handle some pretty niche areas that can be super helpful to particular groups of people, especially high earners in the medical field.

***Related:*** [\*\*Best Financial Advisors in Boston, MA | Ranking | Boston Area Wealth Management Firms\*\*](#)

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## **Spero-Smith Investment Advisors Review (Now Part of HPM Partners)**

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[Spero-Smith Investment Advisors](#) (now part of HPM Partners) helps clients kickstart their finances so their money can start working efficiently for them. They offer a distinctive experience that is sure to impress clients, both those who have their own finances or worked previously with a wealth management firm in Ohio.

Spero-Smith [recently joined](#) HPM Partners LLC. It is a [fee-only](#) wealth management firm in Ohio.

## **Asset Management**

A disciplined investment strategy is key to realizing any noticeable returns. While you don't want to employ a complete "set-it-and-forget-it" strategy, you also do not want to neglect the regular monitoring that ensures things stay on track.

This is where a wealth management firm in Ohio can help. Using this firm's [asset management services](#) can provide the steady hand needed to prevent panicked moves that can hurt you in the long run.

In addition, these financial advisors in Ohio can introduce you to strategies that can minimize your risk exposure, diversify your investment portfolio, and help you select investments that allow you to realize greater returns at a lower cost.

## **Careful Manager Selection**

This Ohio wealth management firm is selective about how it chooses its managers. They weigh both quantitative and qualitative factors when selecting managers for its asset management and wealth management clients.

A few [factors](#) they take into consideration include:

- Investment objective
- Consistency of investment style
- Long-term, risk adjusted performance
- Management fees
- Management team's experience
- Company reputation
- Investment philosophy
- Information transparency
- Team/manager turnover

## **Financial Advisory Services for Business Owners**

This Ohio wealth management firm offers specialized financial planning advice to business owners who face unique circumstances when it comes to managing their wealth.

This team of financial advisors in Ohio has helped several entrepreneurs and business owners with managing their personal and business assets. The specific services they provide [for business owners](#) include:

- Wealth management
- Asset management
- Financial planning
- Employee benefits and retirement planning
  - Stock options and restricted stock analysis
  - Executive compensation
  - Qualified plans
  - Non-qualified plans
- Business consulting
  - Business valuation
  - Business transition planning

***Don't Miss:*** [\*\*Top Financial Advisors in Florida | Ranking | Florida Wealth Management Firms\*\*](#)

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## **Summit Financial Strategies Review**

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Relationships are central to the work that [Summit Financial Strategies](#) does. The effort the team of Ohio financial advisors puts into initiating and cultivating relationships helps them to develop custom financial plans that are well tuned to the needs, goals, and dreams of their clients.

Summit Financial Strategies is a [fee-only](#) wealth management firm in Ohio.

### **Wealth Management Services**

This financial advisory firm in Ohio offers a [wealth management service](#) that evolves with the changing needs of its clients. They tailor the plan to a client's goals, and adjust it as the client gets closer and closer to achieving them. During the first year with a new client, this wealth management firm in Ohio meets with them at least six times a year.

Specific areas that are covered as part of this wealth management service include:

- Data verification and cash flow review
- Retirement planning
- Asset allocation and portfolio development
- Portfolio implementation
- Account consolidation
- Investment recommendations and performance reviews
- College funding
- Tax planning
- Estate planning
- Tax managed rebalancing
- Insurance needs
- Policy reviews

### **Investment Advisory Services**

Summit Financial Strategies is a wealth management firm in Ohio that helps clients introduce discipline, strategy, and expertise to their investments.

During their first interaction with a client, this wealth management firm in Ohio collects the necessary data and discusses portfolio development. This conversation also touches on the importance of understand comfort levels and risk tolerance.

Once a general outline for the portfolio is agreed upon, this team of financial advisors in Ohio implement the plan and regularly monitor it to verify that things remain on track.

This Ohio wealth management firm's investment advisory services include:

- Asset allocation and portfolio development
- Portfolio implementation
- Tax managed rebalancing
- Account consolidation
- Investment recommendations
- Performance reviews

### **Helpful Resources Page**



A lot of people who consider working with a wealth management firm are anxious about what it will entail. They are also uncertain about what they need to prepare for their first meeting.

Summit Financial Strategies provides a resources page divided into sections for future clients, wealth management clients, and investment advisory clients.

Each section includes forms and helpful documents that allow prospective clients to get their bearings before coming in for the first meeting.

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## Truepoint Wealth Counsel Review

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[Truepoint Wealth Management](#)'s mandate is to provide engaged, transparent financial advice. This financial advisory firm in Ohio also claims that clients can expect [reliable returns in any market](#). That's a pretty good selling point.

They offer a variety of wealth management services including multi-generational family wealth planning, retirement planning, or personal CFO services. In addition to financial advice, they provide guidance and moral support throughout the different stages of the wealth planning process.

Truepoint Wealth Management is a [fee-only](#) financial advisory firm in Ohio.

### **Institutional Investing**

This wealth management firm in Ohio provides investment advice and support for institutions as well as individuals. They focus on small and mid-sized businesses and help them introduce organization and efficiency to their investment strategy. These institutions [benefit from](#):

- Complete independence supported by their fiduciary role and fee-only model
- Intellectual honesty based on evidence-based investing
- Institutional expertise perpetuated by good governance, investment policy development, manager due diligence, and portfolio management

This Ohio wealth management firm serves a variety of institutional clients including retirement plans, charitable foundations, nonprofits, and endowments.

## **Tax Management**

There's no way to avoid taxes. The more you earn, the more you pay. While everyone has to play their part, there are legal ways to minimize the impact come tax time. But as your investments and assets become more extensive, managing the tax side of things can be quite complicated.

This wealth management firm in Ohio gives clients the [tax management help](#) needed to optimize their financial plan. They use asset allocation strategies, tax-loss harvesting, and tax-efficient investments to minimize the overall impact. Moreover, this firm helps with income tax planning and tax return filings.

## **Risk Management**

Rewards in the stock market don't come without some risk. But just because risk is an inherent part of investing, doesn't mean investing is a total gamble. There are strategies investors can use to minimize their risk exposure and play smart.

Truepoint's [risk management service](#) assists clients with evaluating the insurance options that are available and selecting the plans that make the most sense for their portfolio. As an independent, fee-only wealth management firm in Ohio, Truepoint receives no compensation for recommending any insurance companies. Any recommendations are made with the client's best interests in mind.

This risk management service also includes an assessment of existing insurance coverage.

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## **Conclusion - Top 13 Best Financial Advisors in Ohio**

Ohio's got a lot of people in it, so it's no surprise that when we wound up with a whopping thirteen firms on our list of the best financial advisors.

Consider this article your starting point. Compare what you're looking for in an advisor (both in terms of services and personality) to the review sections

above to whittle them down to your own personal list of five or six best wealth management firms in Ohio.

After that, contact each advisor in turn to set up a consultation. The good news is that most financial advisory firms in Ohio and elsewhere offer a free initial consultation.

A little effort towards developing a wealth plan today could equal bountiful returns some time in the near future.

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### **AdvisoryHQ Disclaimer:**

Reasonable efforts have been made to present accurate information, however all info is presented without warranty. Review AdvisoryHQ's [Terms](#) for details. Also review each firm's site for the most updated data, rates and info.

Note: Firms and products, including the one(s) reviewed above, may be our affiliates. Click to view our [advertiser disclosures](#).

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#### Image Sources:

- <http://www.beaconplanners.com/advanced-wealth-strategies>
- <https://www.carnegieinvest.com/our-services/custom-portfolio-management/>
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