

Top 9 Best Financial Advisors in Boston, Massachusetts

2016 RANKING OF TOP WEALTH ADVISORS IN BOSTON

Finding the Top Financial Advisors in Boston, Massachusetts

Finding the right Boston wealth management firm, financial advisor, and financial planner in a place as full and ever-moving as Boston, Massachusetts, is no easy task.

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

Whether you have already entered retirement or are just starting out on the retirement journey, having a great wealth manager or financial planner by your side can be the difference between financial success and financial hardship. The question is: which are the best financial advisors in Boston?

Answering Your Questions – The Top Boston Financial Advisory Firms

To answer the many questions that Boston residents may have regarding the best financial advisors in Boston and other areas in Massachusetts, the AdvisoryHQ research and review team has conducted a detailed analysis of advisors and wealth management firms across Boston, Massachusetts, and we have published our findings in the sections below.



About AdvisoryHQ

AdvisoryHQ News was launched in March of 2015 and has since become one of the fastest-growing review and ranking media for the financial advisory sector. We are committed to simplifying the research that U.S. and U.K. consumers conduct before choosing a wealth management firm or investment manager.

Our reports are published for free, and we do not accept any fees for the financial advisor reviews that we publish. This is to ensure the highest levels of objectivity and unbiased editorial reviews.

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

- [Anchor Capital Advisors](#)

- **Birch Hill**
- **Boston Financial Management**
- **Boston Private Wealth**
- **Choate Investment Advisors**
- **Congress Wealth Management**
- **Fiduciary Trust Company**
- **Lexington Wealth Management**
- **Woodstock Corporation**

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

Top 9 Best Financial Advisors in Boston, Massachusetts

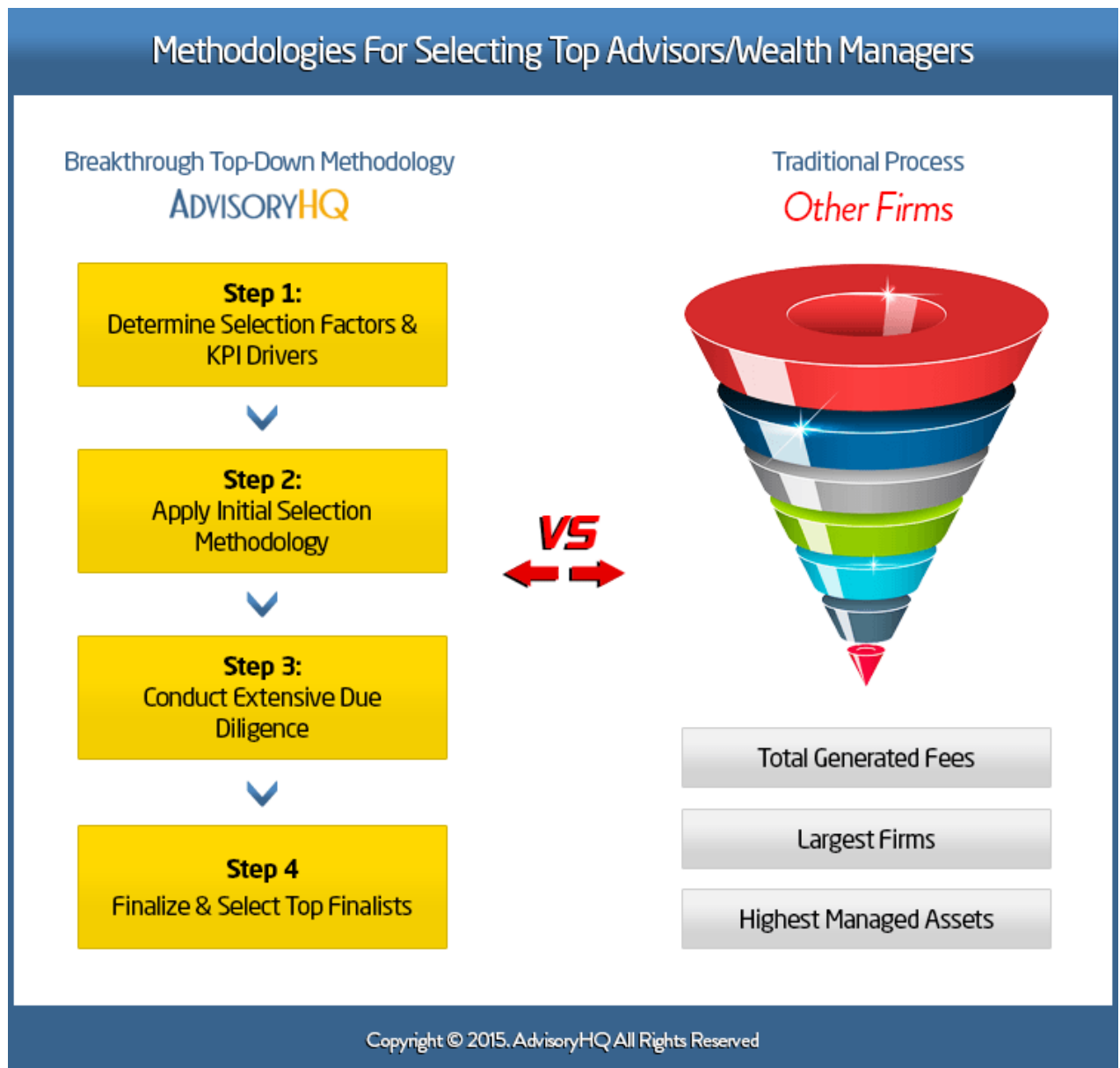
Firm	Location
Anchor Capital Advisors	Boston
Birch Hill	Boston
Boston Financial Management	Boston
Boston Private Wealth	Boston
Choate Investment Advisor	Boston
Congress Wealth Management	Boston
Fiduciary Trust Company	Boston
Lexington Wealth Management	Boston
Woodstock	Boston

Methodology: Selecting the Top Financial Advisors in Boston, Massachusetts

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

Using publicly available sources, AdvisoryHQ identified a wide range of financial advisors, asset and wealth managers, and financial planners that provide services in Boston and 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 Boston, Massachusetts.



Detailed Review – Top Ranking Financial Advisors in Boston, Massachusetts

Below, please find the detailed review of each firm on our list of top advisors and financial planners in Boston.

We have highlighted some of the factors that allowed these Boston financial advisory firms to score so high in our selection ranking.

Anchor Capital Advisors Review

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[Anchor Capital Advisors](#) is a financial planner in Boston that has been in business for over 30 years. The name “Anchor” reflects the company’s core business ethic of stability. They focus on stability both in regard to their in-house operations as well as their investment philosophy.

Approximately 80% of Anchor Capital Advisors is owned by Anchor Capital Holdings, LLC, a subsidiary of Boston Private Financial Holdings. Boston Private Financial Holdings is a publicly-held firm.

Anchor Capital holds contracts with a number of Unified Managed Accounts (UMA) and Separately Managed Accounts (SMA) sponsors.

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

Decades of Experience:

Anchor Capital Advisors is one of the oldest, most established, and most trusted financial planning firms in Boston. William P. Rice founded this Boston wealth management firm in 1983 and still oversees it today. This kind of tenure for a financial advisor in Boston is rare and speaks to Anchor Capital’s success.

During that time, Rice has led Anchor Capital to refine their disciplined investment philosophy. According to Anchor’s own metrics, they experience very little turnover in staff. This fact points to Anchor’s continued success and stability as a Boston financial planner.

Special Divisions to Better Manage Your Portfolio:

Anchor divides itself into two divisions: DMA, or Discretionary Management Accounts, and SMA, or Separately Managed Accounts.

The DMA division works directly with Anchor Capital clients on a discretionary basis. Each client can access their Anchor Capital client service representative and portfolio manager. DMA clients also have the freedom to allow their consultants access to the same Anchor staff assigned to them.

While Anchor has served discretionary clients for over 30 years, it has 20 years of experience with the SMA market. Anchor's SMA division offers subadvisory management services by way of model portfolios. These services are offered to several banks, Registered Investment Advisors, brokerages, and Unified Managed Accounts sponsor firms.

Types of Clients:

As noted previously, Anchor Capital is a wealth management firm in Boston that splits its focus between DMA and SMA accounts. Within their SMA division, Anchor services brokerages, major banks, and RIAs. Anchor also advises on the equity portfolios of pension and profit-sharing programs, both public and corporate. They also assist charities, endowments, and foundations.

Beyond the above client types, however, Anchor Capital has focused on managing the investments of high net-worth individuals since its founding. Their central aims are long-term appreciation, capital preservation, and disciplined risk management. This makes Anchor Capital Advisors a good fit for any personal investor of high net-worth who is seeking out an established, secure financial planner in Boston.

Giving Back to the Community:

Anchor Capital is more than just a financial advisor in Boston: They are also a member of the community.

Anchor believes strongly in giving back to the local community that has helped it grow. To this end, Anchor staff perform community service by serving on boards, sponsoring charitable fundraisers, and volunteering their time.

To encourage this community involvement, Anchor has set up a gift-matching program. Not only that, Anchor Capital also supports Boston nonprofits that emphasize the arts, education, and health care.

Meticulous Fundamental Research:

When selecting stocks for client portfolios, Anchor Capital evaluates the fundamentals of the companies in question. To be considered for inclusion within Anchor Capital's "stock universe," companies must share at least one of the following traits:

- Fair or undervalued valuation
- Maximum PEG ratio of 1:1
- Solid or improving business outlook
- Higher current dividend yield or dividend growth
- Discount to private market value with growth outlook

Several Investment Options:

One of the nice things about Anchor is that they provide many options for client investments. Each Anchor equity portfolio is undergirded by strong fundamental research with broad diversification. Anchor's many investment strategies include:

- Balance
- All-Cap Value
- Small-Cap
- Mid-Cap
- SMid-Cap
- Enhanced Equity
- Select Dividend
- Real Estate Investment Trust
- Focused Value

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Birch Hill Investment Advisors LLC

Review

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

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

Independence, Transparency, and Accountability:

Birch Hill is fiduciary and wholly-owned by their Principals. This leaves the firm free to put your best interests at the heart of what they do. They also work with an independent custodian who ensures that Birch Hill operates with complete transparency and accountability on all client portfolios.

Frequent Charitable Contributions:

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

Generations of Trust:

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

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

The Name Reflects Their Values:

Birch Hill derives its name from a small parcel of New England real estate owned by a Birch Hill client family.

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

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

Focused on Your Long-Term Needs:

As a fiduciary wealth management firm in Boston, Birch Hill is dedicated to each individual client's bottom line. They operate without conflict of interest and do not make commission or performance bonuses based on trying to sell you extra products or services.

What's more, Birch Hill approaches each portfolio with a long-term view. The advisors on the Birch Hill team want to see you grow your portfolio through trusted, fundamentally sound principles that square with your risk tolerance. They will not chase market trends or fads, and they will not settle for short-term results.

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Boston Financial Management Review

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

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

Accountable to Your Unique Needs:

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

BFM ResourceMap™:

To aid in their financial planning service, Boston Financial developed a proprietary tool known as the *BFM ResourceMap™*.

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

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

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

Experience Combined with In-House Mentoring:

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

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

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

Conflict-Free, Fiduciary, and Employee-Owned:

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

Furthermore, BFM advisors will never pawn off affiliate or their own services based on their own self-interest.

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

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

Emphasize Quality in All Investments:

Since their inception, Boston Financial has eschewed all other investments in favor of a top-down, quality-first asset selection. To make sure you are investing in only the highest quality assets, BFM employs a number of qualifying criteria, research, and analysis to weed out lesser investment opportunities.

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

Little Client Turnover and Generational Trust:

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

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

Educating Clients:

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

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

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Boston Private Wealth Review

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

Boston Private Wealth has dedicated itself to becoming one of the elite financial planning and wealth management firms in the country. They operate under the umbrella of Boston Private Bank & Trust.

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

Fee-Based Advisor:

Boston Private Wealth works within a fee-based system. This translates into a client-advisor relationship that will not be burdened with commissions or performance-related bonuses.

Likewise, as a Registered Investment Advisor, Boston Private must handle your investments first and foremost with your success in mind. They will not earn revenue unless your portfolio earns returns. Boston Private Wealth believes that they cannot succeed until you succeed.

Large Firm with Low Client-Advisor Ratios:

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

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

Experienced and Credentialed:

Another great thing that we liked about Boston Private Wealth is their deep experience and varied training. According to Boston Private's own calculations, their advisors and portfolio managers average over 20 years of financial planning.

The Boston Private Wealth advisors also have extensive backgrounds in a range of assets such as fixed incomes, international equities, and domestic equities. This plus their years of experience makes Boston Private one of the most experienced Boston wealth management firms. As a Registered Investment Advisor in Boston, they boast several professional credentials. Included among these are:

- Certified Financial Planner
- Qualified Plan Financial Consultant

- Chartered Financial Analyst
- Accredited Wealth Management Advisor
- Certified Investment Management Analyst
- Juris Doctor

Keeping Communication Open:

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

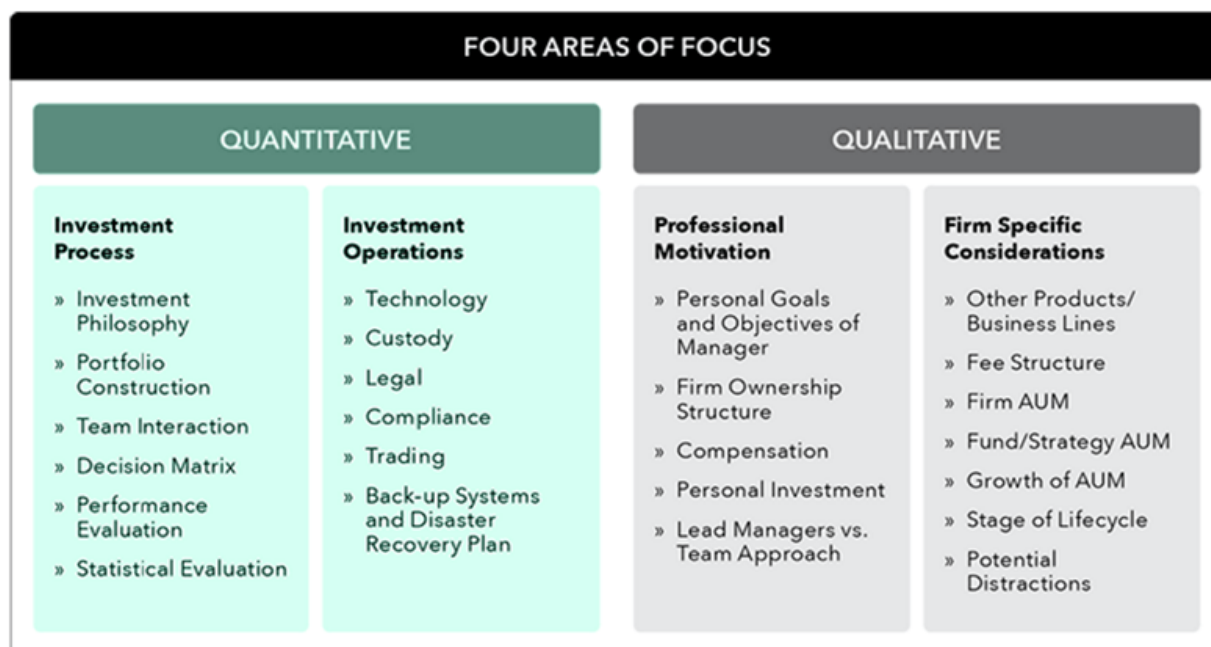
Instead, they seek to educate you through various means. One way they do this is their quarterly newsletter, *Economic & Market Perspective*. They make available exclusive informational client events, such as seminars and webcasts.

Utilizing External Resources:

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

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

A snapshot of the methodology used by Boston Private Wealth when selecting external managers:



A Range of Services:

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

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

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Choate Investment Advisors Review

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

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

Choate Investment Advisors is a subsidiary of Choate Hall & Stewart, a law firm based in Boston, Massachusetts.

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

Awards and Recognition:

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

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

In addition, Choate's managing director, Todd Millay, was named "America's Top 100 Independent Financial Advisors" for 2013 by *Barron's*. He also received *Financial Planning* magazine's Influencer Award in 2011 in recognition of his innovation within the financial planning industry.

Unique, Socially Responsible Approach:

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

The crux of Choate's approach focuses on long-term, sustainable investments that consciously and positively impact society. They target client investments toward socially responsible arenas, including issues of diversity and clean energy, among others. They also highlight companies that issue "Green Bonds," which are bonds whose proceeds are earmarked for positive environmental impact.

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

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

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

A Focus on Community Impact Investing:

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

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

Involvement in the Community:

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

Some examples of community organizations to whom Choate contributes include:

- Political Asylum Immigration Project (PAIR), which assists detainees and those seeking asylum from African countries
- Charles Hamilton Houston Initiative for Race & Justice at Harvard Law School, an organization that encourages at-risk students who struggle with learning disabilities to remain in school and avoid getting involved in crime

- Massachusetts Clean Energy Center, a state organization that advances clean energy initiatives for Massachusetts citizens who pay energy rates
- InnerCity Weightlifting, an organization whose goal is to socially and economically mobilize inner-city youth

Independent Structure:

While they are a subsidiary of Choate Hall & Stewart, Choate Investment Advisors was built with an independent structure. This means that they do not answer to anyone but themselves when making investment decisions on your behalf. Outside pressure will never be placed on Choate financial advisors to meet quotas, push extra products and services, or make referrals to paid affiliates.

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Congress Wealth Management Review

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

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

A “Financial Integrator”:

Congress fancy themselves a “financial integrator.” This represents the firm’s holistic and comprehensive approach to wealth management.

Congress’s financial integration makes them a “one-stop shop” of financial planning services. They can assist you in everything from investment strategies, financial planning, tax efficiency, philanthropic giving, and real estate planning, among other services. With Congress

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

Ethics and Transparency:

As established earlier, Congress Wealth Management is a financial planning firm in Boston that is completely independent. As such, they are committed to operating with 100% transparency in growing and preserving your wealth.

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

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

Accountability:

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

To help accomplish this, the Congress Wealth team of financial advisors keeps current on a range of professional designations and certifications. Among these are:

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

Partnering with the Community:

One of the things we liked best about Congress Wealth Management was their broad range of community involvement. To this end, employees at

Congress are encouraged to actively participate in local charitable organizations.

Some of these organizations, among others, include:

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

Three-Tiered Process:

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

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



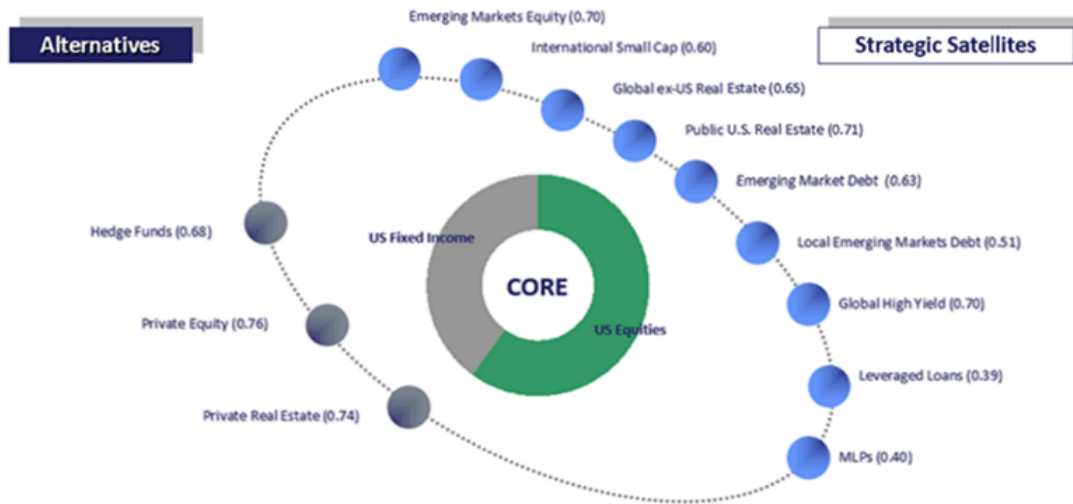
Dual Approach:

Congress Wealth Management applies a two-pronged system to maximize your investments while minimizing your risks. It is called the Core and Satellite Approach, and it represents Congress's attempts to diversify your investments and maintain a balanced portfolio.

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

By implementing this two-pronged approach, Congress Wealth Management can compartmentalize risk in order to better manage it.

From there, they can supplement and strengthen your portfolio with additional investments. In the end, the Core and Satellites Approach helps Congress financial advisors to restructure and rebalance your portfolio to accelerate progress toward your goals.



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Fiduciary Trust Company Review

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Fiduciary Trust Company is one of the oldest financial advisors in Boston. They were originally founded in 1885 as a family office, but now they operate completely independently and are privately owned. They currently manage over \$10 billion in assets for high net-worth individuals, families, and philanthropic organizations.

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

Privately Owned:

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

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

Open Architecture:

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

Fiduciary investment advisors endeavor to provide objective financial planning and wealth management advice to each client. They “sit on the same side of the table” as their clients and only consider themselves successful when their clients’ goals are met. They do not recommend products or services out of self-interest or out of concern for anything other than your financial needs.

Well-Rounded, Integrated Services:

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

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

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

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Lexington Wealth Management Review

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Lexington Wealth Management is a financial advisor in Boston that services high net-worth individuals. Their structure is based on a fee-only approach, and they avoid any conflict-of-interest that arises from competing agendas. Because of this, they are fully independent and center their investment recommendations on the client's needs and goals.

Lexington Wealth Management was listed in *Financial Advisor Magazine's* 2015 Annual RIA Rankings.

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

Fee-Based and Autonomous:

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

They can make these claims because of their independent structure. Lexington Wealth Management does not answer to anyone else, be it a parent company or compensated affiliate. They can make the best decisions for you and your portfolio without having to consider external opinion or undue influence.

Wealth of Service Options:

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

Lexington even has partnerships with companies who specialize in elite concierge services. You can rent a yacht, book executive travel, or plan your business's next annual meeting, to name only a few of the premium services available to you.

Well-Rounded Investment Plan:

When Lexington collects information on your finances and goals, they focus on your dreams and processes. They call this tapping into your “heart” and your “head.”

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

Success Stories:

Not content to simply tell you that they’ve helped past clients, Lexington wants to show you.

On their website, Lexington features a number of [success stories](#) for you to peruse. Each story focuses on a new client who needed to craft and implement an investment plan. The catch is that these individuals experienced uncertain or difficult life circumstances.

By working with Lexington, these people created an investment strategy that accounted for all of their concerns. From there, they implemented their plans and saw success in coming closer to their future goals.

Listing true-to-life stories of real, everyday clients helps Lexington to inspire those people who might be hesitant to entrust a company with their wealth. This honest, transparent approach goes a long way to proving that Lexington has looked out for their existing clients and that they will look out for you, too.

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Woodstock Corporation Review

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[Woodstock Corporation](#) is a family-owned wealth management firm in Boston that has been in existence for more than 80 years. They primarily target high net-worth clients and families, corporations, charities, and trustees.

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

Five Generations of Family Ownership:

Woodstock's backstory is one of the biggest things that sets them apart from other Boston financial planners.

Woodstock was formed in 1929 in Boston as a means of managing finances for W.A. Paine. Paine was the founder of Paine Webber & Company, a stock brokerage and asset management company. While Woodstock was still a private firm, they experienced enviable growth and success. This prompted other investors to vie for Woodstock's professional wealth management services.

Woodstock continues to thrive to this very day as a family-owned business that has lasted five generations. Additionally, Woodstock boasts several client relationships that span many of those same generations, too.

The Woodstock Advantage:

Woodstock touts their "Woodstock Advantage," which is a key feature set that distinguishes them from many other financial advisors in Boston.

Some of these key features include:

- Customized portfolios built upon each client's unique goals and risk tolerance.
- Low client-to-portfolio manager ratios that keep the personal, intimate feel of a boutique but with the resources of a larger firm.
- More frequent investment in individual securities as opposed to mutual funds, thereby better controlling exposure.
- Investment strategies that are thoroughly vetted at the hands of a qualified teams of in-house researchers. All plans are reviewed by portfolio managers and Woodstock financial analysts.

Quality Investment Research:

A standout trait that sets Woodstock apart is their commitment to rigorous, detailed investment research.

Woodstock engages in its own research through several means. Some of these include:

- Regular consultation with Wall Street analysts
- Regular consultation with Woodstock's roster of management contacts
- Nonstop efforts to find stable companies with a qualified track record and potential for serious long-term growth

To bolster their research efforts, Woodstock's portfolio managers are also investment research analysts. No matter who your portfolio manager may be, you can know that they are trained and equipped to conduct appropriate, expert research into your investments.

Not only that, but Lexington has instituted an Investment Policy Committee. This committee oversees lists of buy and sell recommendations based on the same careful research that permeates Woodstock's entire investment process.

And if that wasn't thorough enough, Woodstock has an Investment Research Committee. The Committee's primary objective is to conduct weekly analysis of the companies featured on Woodstock's monitor list.

All told, the safeguards that Woodstock has put in place go a long way to protecting your investments and your financial future. This is one of the reasons we place Woodstock on our list of the best financial advisors in Boston.

Core Services:

Woodstock offers a wealth of services to their clients. Among these service categories include wealth management, financial planning, and estate planning. Woodstock provides account custody and tax planning services as well.

Woodstock Services Company:

For those clients of Woodstock Corporation who need more services than those mentioned above, they have the option of utilizing Woodstock Services Company.

Through WSC, clients can get a better handle on their tax planning, including preparing tax returns and managing audits. WSC assists in

accounting and other corporate support as well, including tax prep, general management, and financial reporting.

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Conclusion – Top 9 Best Financial Advisors in Boston, Massachusetts

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

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

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

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

Most importantly, they can help you start right now.

Initial consultations are free. Best of all, most of these companies utilize a transparent, open architecture. This translates into the peace of mind that comes with knowing they will operate above-the-board and in your best interests.

If you have questions, comments, or tips about this "Top 9 Financial Advisors in Boston, Massachusetts" 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