

Top 9 Best Financial Advisors in Chicago, IL | 2017 Ranking | Chicago Wealth Management Firms

2017 RANKING & REVIEWS TOP WEALTH ADVISORS IN CHICAGO

Finding the Top Financial Advisors in Chicago, Illinois

Finding a reputable, respected, and expert Chicago wealth manager is key to a strong overall financial present and future.

With that being said, there are so many wealth managers in Chicago that it can be frustrating to try to sort through them all just to find even a few that you can trust. After all, how can you find a financial advisor in Chicago that specializes in tax-efficient portfolios?

Or how will you know if you're getting a financial advisor that is also a Registered Investment Advisor? In Chicago, the options can feel endless, and the search can become overwhelming.

However, before you take even one step toward your goal of finding reputable financial planners in Chicago, you need to know what to look for.

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

This ranking of the top 9 financial advisors in Chicago and Chicago wealth managers focuses primarily on fee-only firms, which means these firms are not affiliated with any larger organization or brokerage, so their advice is completely unbiased and objective.

While this is the top ranking factor, there are also a few fee-based Chicago financial advisors on this ranking, and they were included because despite that fee structure, they still excel in terms of their reputation, level of service, and their client-first approach.



Award Emblem: Best Financial Advisors in Chicago, Illinois

AdvisoryHQ's List of the Top 9 Best Financial Advisors in Chicago

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

- [**Chicago Partners Wealth Advisors**](#)
- [**D3 Financial Counselors**](#)
- [**DeRose Financial Planning Group**](#)
- [**Financial Solutions Advisory Group**](#)
- [**FourStar Wealth Advisors LLC**](#)
- [**Private Vista**](#)
- [**Savant Capital Management**](#)
- [**The Mosaic Financial Group**](#)
- [**Timothy Financial Counsel**](#)

Top 9 Best Chicago Financial Advisors | Brief Comparison

Top 9 Chicago Financial Advisors	Client Focus	Fee Structure	What Sets This Firm Apart
Chicago Partners Wealth Advisors	Individuals, families, institutions	Fee-only	Manages more than \$1.2 billion
D3 Financial Counselors	Individuals and families	Fee-only	Takes a team approach to advisory services
DeRose Financial Planning Group	Individuals and families (special focus on female clients), and businesses	Fee-based	Woman-owned financial planning in Chicago
Financial Solutions Advisory Group	High net worth individuals and families	Fee-only	Firm specializes in having a low client-to-advisor ratio
FourStar Wealth Advisors	High net worth individuals and families	Fee-based	Follows the Build-Live-Share investment and wealth management philosophy
Private Vista	Individuals including people going through transitions such as a divorce as well as business owners	Fee-based	Specializes in helping clients with transitional periods, such as after a death or divorce
Savant Capital Management	Individuals and families, businesses with retirement plan needs, medical and dental practices	Fee-only	Offers Savant Portfolios services for people with smaller portfolios or who are new to investing
The Mosaic Financial Group	Business owners, corporate executives,	Fee-only	Mosaic works with not only individuals and families but

	individuals and families		also businesses as a CFO
Timothy Financial Counsel Inc.	Individuals, professionals, people approaching retirement	Fee-only	Features hourly fee options and no income minimums

Table: Top 9 Best Financial Advisors in Chicago | Above list is sorted alphabetically

AdvisoryHQ's Selection Methodology

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

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

Detailed Review – Top Ranking Best Financial Advisors in Chicago

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

See Also: [Best Financial Advisors in D.C., Maryland, and Virginia \(Tri-State\)](#)

Chicago Partners Wealth Advisors Review

[Chicago Partners Wealth Advisors](#) is one of the leading financial advisory firms in Chicago, made up of an expert team of 11 professionals who manage

[more than \\$1.2 billion](#) for individuals as well as families and institutions. Chicago Partners is an independent advisory firm, and is SEC-registered.

One of the many unique and valuable aspects of this particular Chicago financial advisor firm is the fact that the senior investment professionals who work here have an [average 20 years](#) of experience.

Key Factors that Enabled This Firm to Rank as a Top 2017 Wealth Advisor in Chicago

Independent Advice

As was mentioned in the introduction to this ranking of the leading Chicago financial advisors and wealth advisory firms in Chicago, one of the most important considerations was whether or not a firm is fee-based.

Chicago Partners is a truly independent Chicago financial advising firm because their advisors don't receive compensation for recommending certain investment products.

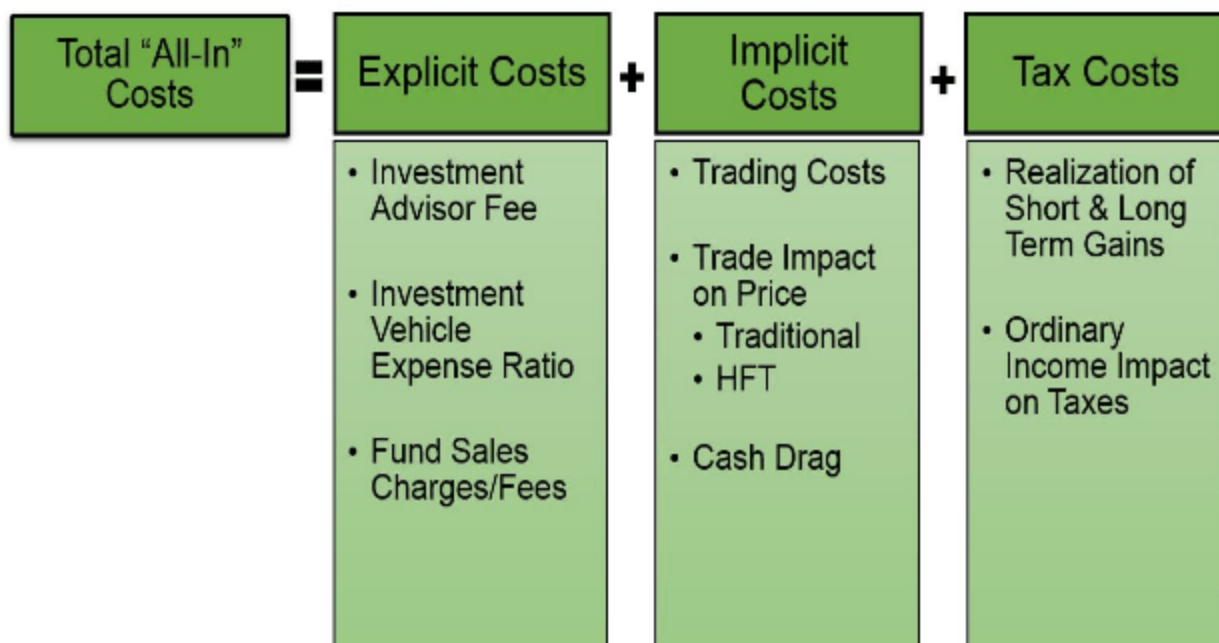
The professionals at Chicago Partners operate as fiduciaries on behalf of their clients, and they always put their best interests at the forefront of everything they do.

Because of the independent structure of this financial advisor in Chicago, investment recommendations focus on things such as low-cost institutional class shares of mutual funds and other options that deliver the desired results.

Tax Efficiency

Chicago Partners, one of the top wealth management firms in Chicago, emphasizes not only independence and objective investment advice, but also tax efficiency. Tax efficiency is a priority in terms of selecting particular investments, recommending withdrawal strategies and in the allocation of assets.

For example, one of the overarching strategies utilized at Chicago Partners to highlight tax efficiency is the tendency to choose low turnover equity funds, which are beneficial in terms of making gains in the long-term and also in terms of capital gains distributions.



Accessibility

One of the advantages of working with this particular wealth advisory firm in Chicago is the unique access they offer to their clients. For example, clients of Chicago Partners can invest in vehicles like Dimensional Fund Advisors. This is often closed to other firms and individuals.

Chicago Partners has an established history of offering clients the opportunity to access funds not available to many other investors. This is because Chicago Partners has relationships with exclusive firms and their funds, and this Chicago wealth management firm maintains comprehensive knowledge about these products, so they can act as experts.

Chicago Partners also occasionally makes purchases of institutional class shares of mutual funds for clients, and they wouldn't otherwise be eligible for purchase by direct individual investors.

D3 Financial Counselors Review

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

Key Factors that Enabled This Firm to Rank as a Top 2017 Financial Manager Firm in Chicago

Complete Transparency

D3 Financial is not the kind of financial advisor to push products or extra services on you with additional costs. It neutralizes any potential conflict of interest by completely removing commission-based payment structures, making it one of the leading overall financial advisory firms in Chicago as well as one of the best fee-only options.

This includes charging fees for financial advice as well as additional products and services that it recommends. Additionally, D3 financial advisors do not work on commission.

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

Client-Centered

D3 Financial is a completely independent, fiduciary financial advisor in Chicago. D3 advisors consult only with other members of the D3 team in order to give your account the full-fledged, comprehensive direction that you deserve. This means there are no quotas from a parent organization, and no third-party pressure to make certain investment decisions on your behalf.

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

Multiple Inputs

With D3 Financial as your financial advisors in Chicago, you don't get just one person working on your portfolio. D3 takes a [team approach](#) that informs your investment strategy with the complete expertise, knowledge, and experience of

the entire D3 Financial family. This gives you the added security that you are receiving tried-and-tested financial planning advice.

Financial Direction Plus Education

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

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

Continuing Education

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

No "One-Size-Fits-All" Approach

D3 makes a point of listening to you and your concerns before crafting a personalized investment strategy. It calculates your risk tolerance and couples it with the goals that you have in mind for your money.

D3's Certified Financial Planners compose each financial plan rather than punching numbers into a computer and printing out a generic template. This ensures that your financial advice has been personally and

thoroughly reviewed by a human advisor prior to implementation.

[Don't Miss: Top Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee](#)

DeRose Financial Planning Group Review

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

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

It should be noted that while we generally focus our rankings on fee-only financial advisors, DeRose is a fee-based planner, but they were included because of their long history in the business, well-defined planning approach, and their reputation.

Key Factors that Enabled This Firm to Rank as a Top 2017 Wealth Advisor

Continually Seeking to Learn and Improve

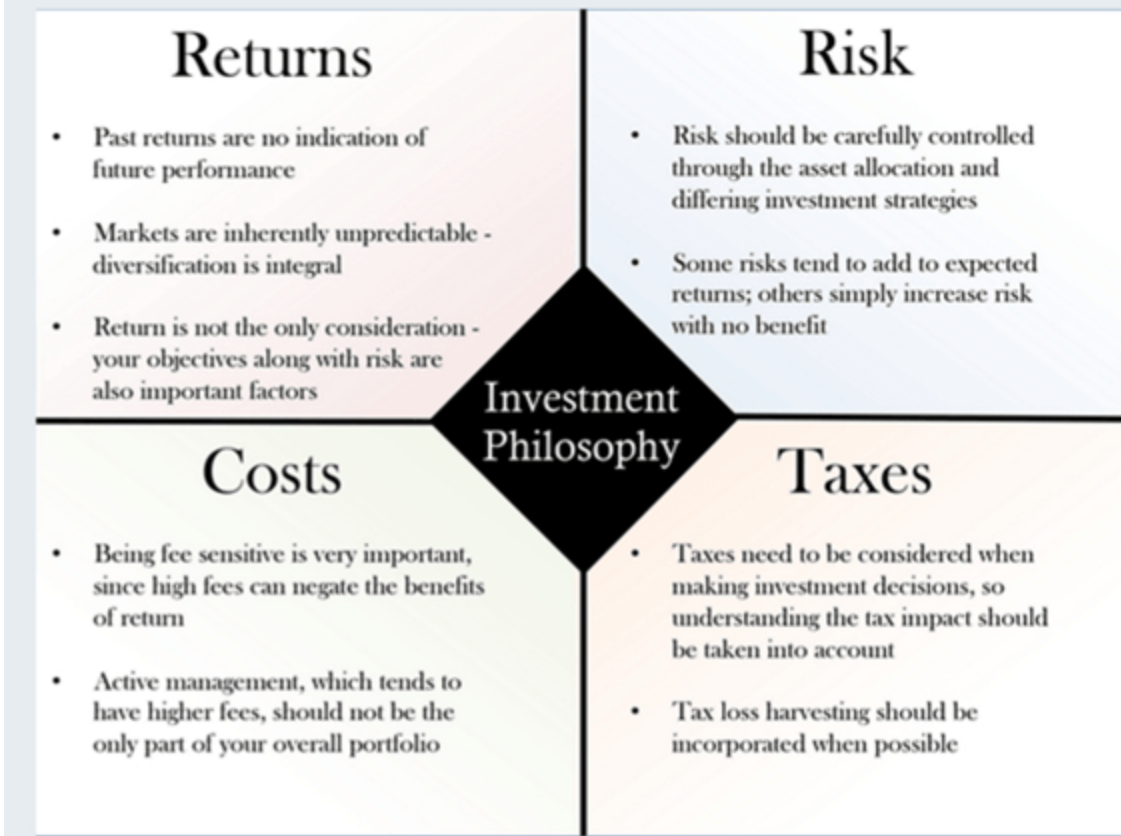
Each member of the primary financial advisor staff at DeRose has sought to expand his/her bank of knowledge and skills. Several team members are licensed to sell insurance in Illinois and are currently seeking to grow their licensures.

Even the support staff members have educated themselves on the ins and outs of financial planning in order to better serve clients' questions, ideas or concerns.

A Holistic Approach to Investing

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

Investment Philosophy



Multi-Generational Planning

If one of your goals is to provide security for your children and your children's children, then DeRose FPG has a plan for you. With its Multigenerational Planning, DeRose takes a snapshot of your life, financial health, and all of your investment goals.

From there, it determines how to best build a comfortable family savings for years to come. Not only that, but part of the DeRose process includes educating your children about handling money responsibly when they inherit it. DeRose can also help smooth out the process of passing your family business onto your children when the time comes.

Total Team Effort

DeRose employs financial planners in Chicago who boast a range of training and specializations. A Certified Public Accountant is on staff to assist with tax queries. Karen L. DeRose herself is a Chartered Retirement Planning Counselor and a Certified Financial Planner. She is also licensed to sell health

and life insurance in several states. Another team member is pending in CFP certification.

Several staff members hold Series 6, 7, 63, and 66 registrations, enabling you to receive assistance from several DeRose advisors when it comes to investing your money. Furthermore, almost every primary team member is licensed to sell health and life insurance in Illinois.

A Plan Focused on Your Needs

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

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

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

Financial Solutions Advisory Group Review

[Financial Solutions Advisory Group](#) provides financial planning and wealth management services to high-net-worth individuals and families.

As one of the best financial advisors in Chicago, Illinois, Financial Solutions Advisory Group is a fee-only financial planner. It structures client portfolios around a mix of investment types to limit risk and help clients reach their goals faster. Of all of the top wealth management firms in Chicago, Financial Solutions Advisory Group has amassed some of the highest levels of experience.

Key Factors that Enabled This Firm to Rank as a Top 2017 Financial Advisor in Chicago

Hourly Rates, No Commissions

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

Independent and Fiduciary

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

It is also registered with the SEC, which means that it must legally look out for what's best for its clients ahead of its own bottom line. Due to its independent and fiduciary nature, Financial Solutions Advisory Group has the freedom to select whichever financial management professionals, services, and products will help you meet your investment needs.

Low Client-to-Advisor Ratio

Financial Solutions Advisory Group prides itself on its low client-to-advisor ratio. By keeping a manageable number of clients assigned to each advisor, Financial Solutions Advisory Group ensures that you will receive the utmost in client service and attention throughout the investment process. Additionally, this guarantees that your portfolio will be managed regularly and with a high degree of personalization to make sure that your financial needs are being met.

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

Years of High-Quality Investment and Wealth Management Experience

One of the great things that we found when reviewing Financial Solutions Advisory Group was the experience level of its team. The FSAG staff combined has over [150 years](#) of financial planning and wealth management experience; more than most of the other financial advisors in Chicago on this list. Team members also started out working for some of the country's most esteemed financial organizations, giving the company the kind of experience in premier institutions that translates into top-tier service for you. When you let Financial Solutions Advisory Group handle your investments, you can feel comfortable with its knowledge and expertise.

Investment Plans Built Around You

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

Smooth Online Interface

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

Targeted Clients

For as long as it has been in business, Financial Solutions Advisory Group has worked primarily with high-net-worth clients. The typical FSAG client is an

individual or family who can put \$500,000 or more toward his/her investments.

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

[Related: Best Financial Advisors in Oklahoma City & Tulsa, Oklahoma](#)

FourStar Wealth Advisors LLC Review

[FourStar Wealth Advisors](#) is not a fee-only Chicago financial management firm, which is important to note. Instead, FourStar is a fee-based firm, but they are included on this ranking of the top financial advisors in Chicago because they remain committed to being independent and approaching the financial management process in a way that creates long-term relationships and values for their clients.



FourStar is an independent Registered Investment Advisor (RIA) whose principal aim is to help you reach your financial goals. It has been in business since 2014.

Key Factors that Enabled This Firm to Rank as a Top 2017 Wealth Advisor in Chicago

Custom Plans to Build the Life You Want

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

"Build-Live-Share" Philosophy

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

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

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

Specializes in Individuals and Families

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

Private Vista Review

[Private Vista](#), which was previously known as Financial Strategy Network, is a fee-based financial planning firm in Chicago.

Private Vista is fee-based, but they provide clients with an initial no cost consultation. It's during this time that clients can decide whether or not Private Vista is the right Chicago financial management firm for them.

Management fees, which are different from planning fees, are based on a fixed percentage of assets under management, and as assets increase, that fixed amount goes down. Private Vista was formed between a merger of Financial Strategy Network (FSN), as well as WNA Wealth Advisors in Hinsdale, Illinois.

Key Factors that Enabled This Firm to Rank as a Top 2017 Wealth Advisor

Minimal Commissions

In the interest of transparency, Private Vista discloses its fees at the start of any client relationship prior to commencing with implementation.

Private Vista charges a reduced rate for clients who wish to update their financial plans annually. It also charges management fees at a fixed percentage of AUM. Additionally, management fees are inversely proportional to asset gains, i.e., as assets increase, the management fees drop.

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

Client-Centric Approach

One of the unique aspects of this Chicago wealth management firm is in how it treats clients outside of the traditional client-advisor relationship. Private Vista goes above and beyond the vast majority of financial advisors in Chicago by regularly holding client events.

Private Vista is a Chicago financial manager firm that also strives to learn everything there is to know about a client from their financial resources to current commitments, personal expenses, and cash flow.

Private Vista also takes into consideration factors that many other Chicago financial managers might not, such as the client's views, passions, and definition of a fulfilled life.

Plan Presentation

Once the Private Vista team of Chicago financial planners has taken a deep, comprehensive and detailed look at a new client's current situation and future goals, they then analyze everything and determine how these impact their

plan. Then, they're able to start providing preliminary recommendations and plans.

Private Vista presents their plan in a unique way-- as a personal journey. The client can see not only an inventory of their assets, but how these assets and resources ultimately connect to the goals they have for their life.

All of this is based on scenario planning tools.

Detailed and Customized Model Portfolios

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

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

Popular Article: [**Best Financial Advisors in Philadelphia, PA**](#)

Savant Capital Management Review

[Savant Capital Management](#) is an independent, fiduciary financial advisor in Chicago, helping clients since 1986, whose tagline is "building ideal futures." Savant aims to make this mantra a reality by helping its clients maximize their investments while safeguarding themselves and their assets during the journey.

In 2015, Savant Capital won [Charles Schwab's Best-in-Business Impact Award](#). The same year, it was ranked 39th out of 100 in *Financial Planning* magazine's "Top 100 RIA Firms." It was also voted 42nd in Investment News's "Largest Fee-Only Registered Investment Advisors" for 2015. In 2016, Barron's named it one of the Top 20 Independent Advisory Firms. It currently serves clients around the country from offices located throughout Illinois,

Virginia, and Wisconsin. Also, Savant Capital Management is a fee-only Chicago financial manager firm.

Key Factors that Enabled This Firm to Rank as a Top 2017 Chicago Financial Advisor

Transparent, Tiered Fee Structure

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

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

Helping You Weather Life's Storms

We particularly liked Savant Capital Management's focus and dedication to your long-term success. As one of the best financial advisors in Chicago, it not only wants to grow your portfolio, but it also wants to help you plan and save for life's unpredictable events. To this end, Savant asks you to complete *The Ideal Futures Financial Health AssessmentSM* to help get a better idea of where you are in life and how to help you move forward. *The Ideal Futures Financial Health AssessmentSM* hones in on 10 "key planning areas" that represent Savant's core financial planning philosophy.

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

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



Regular Volunteerism

Savant encourages its employees to regularly volunteer with nonprofits that are local to its many offices. With this purpose in mind, Savant established the Savant Volunteer Grant Program. Through the program, Savant highlights its employees' volunteer efforts by contributing to the same organizations as its employees. Savant goes even further than this by encouraging companies to contact it directly with any volunteer opportunities that they may have for Savant staff.

Range of Services

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

It can prepare personal, estate, business, and trust tax returns in addition to the other services mentioned. Lastly, Savant Capital Management can consult with businesses that need help with their payroll and accounting.

Long-Standing Professionalism

Of all of the financial advisors in Chicago, Savant Capital Management is one of the longest tenured firms. Established in 1986, the Savant Capital Management team has grown to include several offices throughout the state of

Illinois and offices in both Virginia and Wisconsin. Its stability and growth reflect its commitment to helping clients meet their investment goals.

Savant Capital Management stands out from the crowd of financial advisors in Chicago with its transparency and focus on your success. As a fiduciary registered with the SEC, Savant will put you at the center of its business. To that end, the Centre for Fiduciary Excellence (CEFEX), an independent assessment organization, audited Savant Capital Management. In fact, the Centre for Fiduciary Excellence (CEFEX) has recognized Savant as a Certified Investment Steward and a Certified Investment Advisor. These designations confirm that Savant's fiduciary practices as an employer and as a provider have been audited by an independent global assessment and certification organization to be in conformity with global fiduciary best practices.

Member of Zero Alpha Group

Savant is a member and co-founder of the Zero Alpha Group, a nationwide network of advisory firms. [Founded in 1995](#), Zero Alpha Group shares the same philosophy as Savant when it comes to providing independent, transparent, and fiduciary-based financial planning. The members of Zero Alpha Group are dedicated to a set of core values, including avoiding conflicts of interest as well as providing tax-efficient portfolios and objective, structured financial planning, among others.

Targeted Audience

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

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

Another great aspect of Savant Capital Management is its expanded reach. It not only has clients in nearly every state across the country but also enables

long-distance clients to utilize its services via its eSavant Advisor service. Clients utilizing this service have access to all of the same products, services, and consultations as clients who are regularly able to meet with Savant in person.

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

Savant Capital Management and its employees are independent of and are not employees or agents of Charles Schwab & Co., Inc. ("Schwab"). Schwab does not prepare, verify or endorse information distributed by Savant Capital Management. The Best-in-Business IMPACT Award™ is not an endorsement, testimonial endorsement, recommendation or referral to Savant Capital

Management with respect to its investment advisory and other services.

Read More: [Best Financial Advisors in Cincinnati, Ohio](#)

The Mosaic Financial Group Review

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

Key Factors that Enabled This Firm to Rank as a Top 2017 Wealth Advisor in Chicago

Fee-Only and Independent

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

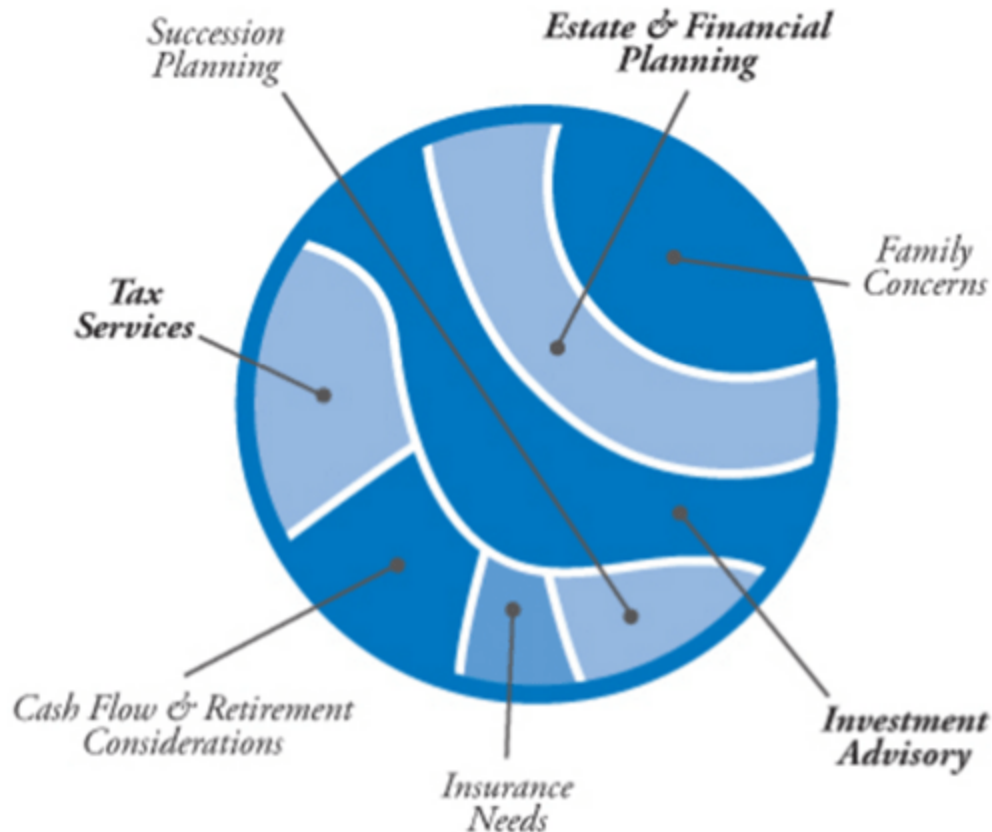
Dedicated to Long-Term Relationships

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

A Total Service Package

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

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



Unified Team Approach

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

Mosaic leverages the many "hats" worn by team members into a powerful group management approach toward client portfolios. More than one set of qualified eyes review each individual portfolio, with every team member contributing as much as they can. In this way, Mosaic Financial Group helps build investment strategies that are sound and backed by the firm's collective expertise.

Questions Are Free

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

Timothy Financial Counsel Review

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

Key Factors that Enabled This Firm to Rank as a Top 2017 Chicago Wealth Advisor Firm

Unique Hourly Rate

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

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

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

An Entire Office Working for You

Not all financial advisors in Chicago dedicate a team to review your portfolio and investment plan. However, when you do business with Timothy Financial Counsel, you engage with a smaller office with a low client-to-advisor ratio. This enables Timothy Financial Counsel to oftentimes dedicate its entire office of professional financial planners to the task of crafting your financial plan.

Many advisory firms simply assign you to a single advisor while utilizing other departments as necessary, such as taxes, accounting, retirement, and the like. It is rare for an entire team to work on balancing your portfolio at once. Likewise, it is even rarer for all of the employees in a single company to do so. Timothy Financial Counsel promises just that throughout the process of originating your plan.

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

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

Bundled Services

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

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

No Income Restrictions

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

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

Empowers You to Start on Your Own

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

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

Conclusion - Top 9 Best Financial Advisors in Chicago, Illinois

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

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

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

Every financial planner in Chicago on our list offers a free initial consultation. The potential positives outweigh the negatives, especially when only a few

hours of your time are required. Your financial well-being and peace of mind can make all the difference.

Image sources:

- <https://www.chicagopartnersllc.com/default.asp?P=950891>
- <http://www.derosefpg.com/p/investment-philosophy>
- <http://image.shutterstock.com/z/stock-photo-millennium-park-chicago-cloud-gate-also-known-as-the-bean-is-one-of-the-parks-major-attractions-113299960.jpg>
- <https://www.savantcapital.com/working-with-you/our-approach/the-ideal-futures-portfolio>
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