

Top 10 Best Financial Advisors in Indianapolis, IN | 2017 Ranking | Indianapolis Wealth Managers

2017 RANKING & REVIEWS TOP RANKING FINANCIAL ADVISORS IN INDIANAPOLIS, INDIANA

Searching for the best of something can be a tough undertaking. Searching for the best financial advisors and wealth management firms in Indianapolis, Indiana, is no exception. If you find yourself here, you most likely need clarity in your finances and you know that the services of a financial advisor will help you to assess your situation and plan for a bright future.

Financial advisors in Indianapolis offer a wide range of services from basic financial management to retirement to more complex issues like estate planning and investment management, which involves mutual funds, stocks, and building a successful portfolio.

Do you know yet what exactly it is that you want? Are you spending a lot of time thinking about the future? Where is it leading you?

As you search for the right Indianapolis financial advisor for you, you probably want to know that your future is safe and secure in their hands. We couldn't agree with you more.



Award Emblem: Top 10 Best Financial Advisors in Indianapolis

Building trust through a relationship with your financial advisor in Indianapolis is paramount. After all, you are entrusting your life's earnings with this professional! With such high stakes, it's essential to do the appropriate research to weed out those financial advisors in Indianapolis who are more profit-driven than client-driven.

At AdvisoryHQ, we have done our best to make your journey as straightforward as possible. We apply our own methodology to narrow down a long list of firms to select the top-performing financial advisors in Indianapolis for your consideration.

AdvisoryHQ's List of the Top 10 Best Financial Advisors in Indianapolis

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

- [Avalon Wealth Advisory](#)
- [Bedel Financial Consulting, Inc.](#)
- [Castle Wealth Advisors, LLC](#)
- [Column Capital](#)
- [Deerfield Financial Advisors, Inc.](#)
- [Halter Ferguson Financial, Inc.](#)
- [Market Street Wealth Management Advisors, LLC](#)
- [Ronald Blue & Company](#)
- [Valeo Financial Advisors, LLC](#)
- [Wallington Asset Management, LLC](#)

Top 10 Best Financial Advisors in Indianapolis, Indiana | Brief Comparison

Firm	Highlighted Features
Avalon Wealth Advisory	The Building Process
Bedel Financial Consulting, Inc.	Bedel Barometer
Castle Wealth Advisors, LLC	Business Succession Planning
Column Capital	Comprehensive Tax Services
Deerfield Financial Advisors, Inc.	Life Planning (Preparing for instability)
Halter Ferguson Financial, Inc.	Account consolidation
Market Street Wealth Management Advisors, LLC	Income tax optimization of financial planning & investment management
Ronald Blue & Co.	Christian financial planning
Valeo Financial Advisors, LLC	One transparent fee
Wallington Asset Management, LLC	Registered Investment Advisor (RIA)

Table: Top 10 Best Financial Advisors in Indianapolis | 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 Wealth Management Firms in Indianapolis

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

See Also: [Best Financial Advisors in Philadelphia, PA | Ranking | Greater Philadelphia Area Wealth Managers](#)

Avalon Wealth Advisory Review

[Avalon Wealth Advisory](#) is a Registered Investment Advisor (RIA) located in Indianapolis. They offer comprehensive financial planning and investment management services to a wide variety of affluent clients including individuals, families, business owners, corporate executives, physicians, and more.



Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Indianapolis

Listed below are key factors that allowed Avalon Wealth Advisory to rank as one of this year's top wealth management firms in Indianapolis.

A Team Approach

In order to best fulfill your financial needs, Avalon Advisory coordinates with all of your financial professionals, including your legal, accounting, and banking advisors, to create a comprehensive, fluid plan.

A Fee-Only Advisor

Interested only in the goals of their clients, Avalon Advisory chooses to operate as a fee-only firm. Their goal is to be an organization that provides unbiased advice that is free from conflict of interest issues with another organization or individual.

All fees charged by your Indianapolis financial advisor at Avalon are disclosed up front and clearly outlined. There are no hidden fees, and each plan is custom tailored to fit your needs.

Your Builders

The strength and expertise of the team at Avalon Advisory stands out through each member. Together, this team of Indianapolis financial planners has over a century of experience in leading their clients to their financial goals.

Additionally, every Indianapolis financial advisor [on the team](#) has been certified as a Certified Financial Planner (CFP), further exemplifying their dedication to doing their best for their clients.

The Building Process

Avalon Advisory takes a bit of a different approach to building a comprehensive plan. They liken it to constructing a building, and they take their metaphors seriously. They start with a blueprint and work hard to build a sound structure.

Here's how this top wealth management firm in Indianapolis guides you to create the best plan for you with their [Building Process](#):

- **Initial Meeting**: Whether you are just testing the waters or ready to cannonball right into financial planning, Avalon Advisory offers a series of 1-3 initial meetings at no cost and no obligation to you. These meetings help you identify expectations and create an assessment of your needs.
- **Financial Blueprint**: During this stage, all efforts are focused on your financial future for the next 3-5 years. Your Indianapolis financial advisor will develop the goals and objectives discussed during the initial meetings and determine a starting point for your assets, liabilities, income and expenses, investments, wills and trusts, insurance, and more.
- **The Building Phase**: When a clear picture has been established, it's time for the implementation of your financial plan. Your Indianapolis financial advisor will coordinate efforts with Certified Public Accountants (CPAs), Estate Planning Counselors (EPCs), risk management professionals, and more, in order to take your blueprint from a plan to a tangible structure.
- **Monitoring and Updating**: The monitoring and updating of your plan is a continuous effort. Changes and adaptations are made to your plan as

the market and your life changes. New opportunities are continuously presented to you for consideration.

Don't Miss: [Best Financial Advisors in Cincinnati, OH | Ranking | Cincinnati Wealth Managers](#)

Bedel Financial Consulting, Inc. Review

Established in 1989 by Elaine Bedel, [Bedel Financial Consulting, Inc.](#) is one of the leading female-owned Registered Investment Advisors (RIAs) in the country. They offer financial planning and investment management services to both individuals and institutional clients.

Bedel Financial is a [fee-only](#) wealth management firm in Indianapolis.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Indianapolis

The following is a listing of key factors that allowed Bedel Financial Consulting, Inc. to rank as one of this year's top wealth management firms in Indianapolis.

No-Obligation Consultation

Bedel Financial offers a [no-obligation consultation](#). This is a fantastic opportunity to discuss your goals and hear how this team of Indianapolis financial advisors can help you in a low-stress environment.

A consultation includes an assessment of your current financial situation and where you want to go from there. Your conversation with this Indianapolis wealth management firm also includes a discussion of plans and strategies, financial projections, and a list of action items that reflect your tentative plan.

The Bedel Barometer

Bedel Financial has curated a neat little tool. The [Bedel Barometer](#) takes into account key areas that have historically been indicators of the strength of the U.S. economy, not just the stock market.



Your Independent Advisor

From day one, Bedel Financial has believed that standing as an independent, fee-only fiduciary was the only way to do business.

After all, how can you get good advice when communication is stifled by third-party commissions and guidance that is far from your best interest?

You can rest easy knowing that doing what's best for you is Bedel Financial's only interest.

Personal Services

As an individual, you will be partnered with the Bedel Financial Consulting team, and they'll help you understand and plan for your future.

Here's a look at [services](#) offered to individual clients:

- **Comprehensive Wealth Management:** This approach combines financial planning and investment management services into one comprehensive plan. Bedel Financial believes this is the best way to manage and grow your assets.
- **Retirement Focus Plan:** Bedel Financial offers a toolbox of services that focuses on analyzing your ability to retire and implementing processes that ensure your success. They abide by a "RetireSecureStrategy" and

also offer an additional layer of protection through insurance services.

- Young Wealth Accumulators: It's never too early to focus on being smart with your money. In fact, 20-40 year olds can benefit tremendously from establishing a solid financial foundation that will carry over into each phase of their lives. This service is dubbed "Generation NeXt" and is designed to guide a younger generation onto an affluent path.

Castle Wealth Advisors, LLC Review

[Castle Wealth Advisors, LLC](#) is a comprehensive financial advisor that operates three separately managed companies. They are Castle Financial Group, Castle Investment Advisors, and Castle Valuation Group.

While they are headquartered in Indianapolis, Indiana, they serve clients in [more than 45 states](#). This Indianapolis wealth management firm's services are tailored to families and business owners.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Indianapolis

Below are key factors that enabled Castle Wealth Advisors, LLC to rank as one of this year's top wealth management firms in Indianapolis.

The Fee-Only Choice

In 1973, when Castle Financial Group originated (before they became Castle Wealth Advisory), they were one of the first fee-only advisors in the Midwest.

A lot has changed in finance over the decades, but Castle Wealth's commitment to being an independent fiduciary invested in its clients has always stayed the same. And of course, they are still a [fee-only](#) wealth management firm in Indianapolis.

Business Succession Planning

Each separate entity of Castle Wealth Advisors works to help business owners achieve optimal success in selling or passing on a business. Services [include](#) but are not limited to:

- Business valuation
- Developing a plan of succession within or outside the family
- Minimizing income taxes
- Reviewing documents with your attorney
- Preparing a detailed transition report
- Estimating retirement income

Triple Power

So, just why would a company split into three? To give you a better idea of what makes each branch of Castle Advisors its own unique entity, let's take a look at all three:

- Castle Financial Group: This is the oldest member of their family of companies. They consider themselves the “architect” of the group that designs financial blueprints to serve and protect clients and their assets. They deal with taxes, gifting, estates, business succession, and retirement.
- Castle Investment Group: This branch is an SEC-registered investment advisory firm, and they take care of your personal assets, charitable trusts, pensions, retirement assets, and family foundations. They also combine a variety of stock options to help you invest wisely and grow your wealth.
- Castle Valuation Group: Preparing business valuations for closely-held companies is the main goal of this entity. They handle both public and private companies through a thoughtful and organized approach.

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

Column Capital Review

[Column Capital](#) is a wealth management firm in Indianapolis with about 250 clients and over \$650 million in assets under management. Its senior directors originally held leadership positions at Ernst & Young's before moving on to form Column Capital.

In addition to being an SEC Registered Investment Advisor (RIA) they are a licensed accounting firm. Since a large and very important part of wealth management is tax planning, this makes Column Capital an attractive choice for clients looking for a wealth management firm in Indianapolis.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Indianapolis

Below are key factors that enabled Column Capital to rank as one of this year's top wealth management firms in Indianapolis.

Comprehensive Wealth Planning Approach

The process of financial planning is greater than the sum of its parts. When you want to grow your wealth, you have to think about more than which stocks to pick.

An understanding of your goals, your current cashflow, your retirement plans, and your tax situation are all important, but complicated matters. This is why working with the right wealth management firm in Indianapolis is vital.

Column Capital's approach to wealth management integrates three key processes: investment management, financial planning, and income tax planning. That last process - tax planning - is extremely important.

In their excitement to realize capital gains, individuals often forget that if they do not think about their tax obligations, they could see a drastic cut of their earnings or the money they put aside for their heirs claimed by the IRS.

The Indianapolis financial planners at Column Capital provide a comprehensive approach by understanding your financial goals and then working hard to align all of their services towards meeting them.

Institutional Investment Platform

If you're working with a top wealth management firm in Indianapolis, you should have access to a wide range of investment opportunities.

Column Capital has an institutional investment platform that allows them to choose from numerous investments for their clients' portfolio. Custody, investment management, and reporting responsibilities are all separated in order to minimize the risk of fraud or theft.

These Indianapolis financial advisors work hard to minimize the fees and tax obligations imposed on their clients' portfolios.

Investment Management

You want an financial planner in Indianapolis who will preserve and protect our wealth - not someone who uses your capital as a gambling chip.

The Indianapolis financial advisors at Column Capital know that aggressively trying to beat the market is a fool's errand. Instead, they focus on developing and impelmenting strategies that can predictably work towards meeting a client's goals.

Through a combination of experience, expertise, research, and technology, this wealth management firm in Indianapolis helps clients make their money work for them effectively and in a way that can stand the tests of market fluctuations.

Column Capital's investment process includes the following steps:

1. Review and prioritize goals and objectives
2. Establish a target asset allocation
3. Prepare an Investment Policy Statement
4. Implement the investment strategy
5. Review and evaluate the investment portfolio

Financial Planning

Clients of Column Capital are only charged a fixed rate for financial planning when working with this [fee-only](#) wealth management firm in Indianapolis. This fee is based on their net worth and the complexity of their individual financial situation.

The areas of financial planning Column Capital addresses include:

- Goal planning
- Net worth and estate summary
- Wealth vision plan

- Income tax planning and projections
- Company benefits planning
- Retirement planning
- Estate & wealth transfer planning
- Insurance analysis and review
- College funding
- Mortgage & debt financing

Tax Services

Without proper planning and preparation, taxes can wipe out a hefty portion of your money.

Through their education and experience, this team of Indianapolis financial advisors can help ensure you follow tax regulations while also minimizing your exposure.

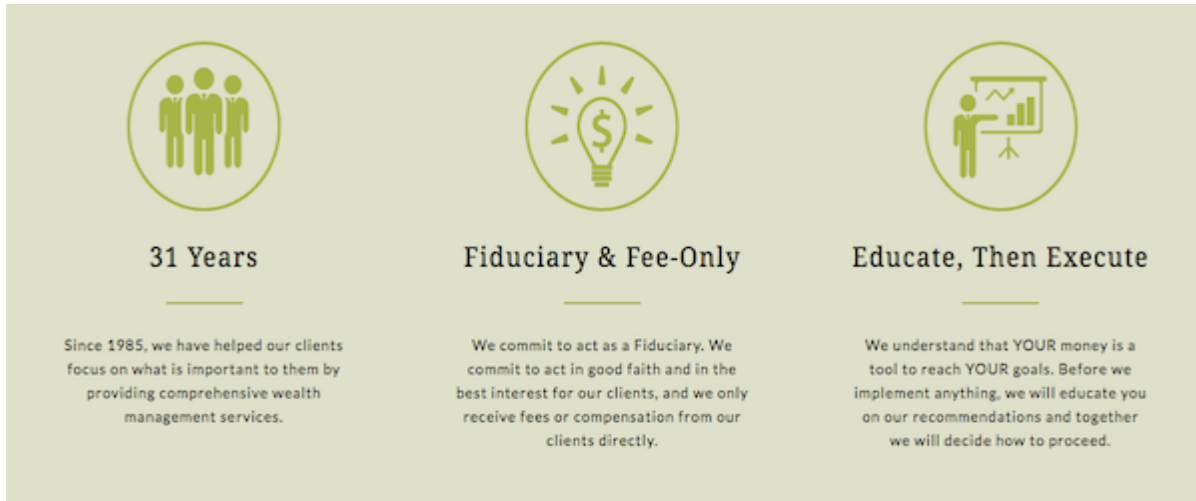
Column Capital offers comprehensive tax services in addition to the following kinds of income tax preparation:

- **Individual:** Federal, State, and Gift Tax
- **Entities:** Trusts, Family Partnership & LLCs, and Private Foundations
- **Audits:** Representation before the IRS and other authorities
- **Tax research**

Deerfield Financial Advisors, Inc. Review

With over 28 years of experience, [Deerfield Financial Advisors, Inc.](#) offers customized financial planning services for well-established individuals, families, business owners, and entrepreneurs.

Deerfield Advisors is a Registered Investment Advisor (RIA). They are a [fee-only](#) wealth management firm in Indianapolis, which allows them the freedom to focus solely on clients' needs. They serve clients through two offices, one in Indianapolis, Indiana, and another in Park Ridge, Illinois.



Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Indianapolis

Below you will find some of the key factors that enabled Deerfield Financial Advisors, Inc. to rank as one of the top wealth management firms in Indianapolis.

The Deerfield Approach

Deerfield Advisors has taken the time to create a value-driven approach to their business. The following is an overview of what this means for you:

- **Experience:** With a richly diverse team and over 25 years of real-world experience, Deerfield Advisors strive to offer you the experience and expertise you deserve.
- **Independence:** The only person who really matters is you. As an RIA, Deerfield Advisors doesn't do business with any brokerage firms, banks, or insurance companies, and therefore, there is no overhead company that influences their advice.
- **Relationship:** Deerfield Advisors say they feel a strong sense of responsibility when it comes to their clients. Through ongoing interaction and communication, their Indianapolis financial planners are able to help you reach your goals and find solutions to your problems in this ever-changing economy.
- **Clarity:** Regardless of how simple or complicated an issue may seem, Deerfield Advisors want to deliver transparent, straightforward, and

easy-to-understand advice without all the usual, distracting financial jargon.

Focus on Tackling Financial Instability Head-On

You can't predict the future, but you can plan for it. At the center of the Deerfield message is a commitment to helping clients maintain stability even in the most volatile financial circumstances.

Their Indianapolis financial advisors can help you plan and navigate life changes including marriage, a job change, children, a divorce, college planning, disability, care of aging parents, and more.

Awards and Achievements

Over the years, the team at Deerfield Financial has been on the receiving end of a variety of awards and acknowledgements. This should serve as a reflection to the cutting-edge practices of the firm as well as the dedication and expertise of their team.

The following is a sampling of some of these achievements:

- 5 Star Wealth Managers, *Chicago* magazine 2014
- 5 Star Wealth Managers, *Indianapolis Monthly* magazine 2014
- Largest Financial Planning Firm, *IBJ* 2015
- “30 Most Influential,” NAPFA 2013

Popular Article: [**Top Financial Advisors in Tampa & St. Petersburg, FL | Ranking | Tampa & St. Petersburg Wealth Managers**](#)

Halter Ferguson Financial, Inc. Review

“Independent. Experienced. Thoughtful.”

Those are the three words [Halter Ferguson Financial, Inc.](#) uses to describe who they are. Since 1986, they’ve been serving clients with sound financial planning and investment management services.

Halter Ferguson is an independent, [fee-only](#) Registered Investment Advisor (RIA) that will take the time to listen to your personal goals and your financial needs. There is no middle man or commission target obstructing your personal interests.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Indianapolis

Below are key factors that enable Halter Ferguson Financial, Inc. to rank as a top wealth management firm in Indianapolis.

The Halter Ferguson Process

Wealth management advice comes at you from all angles. Books, well-meaning colleagues, family, and of course, the internet. Oftentimes, a lot of the information you're digesting is noise.

Halter Ferguson Financial recognizes this and helps its clients understand the essential information that allows them to get where they want to go.

This Indianapolis wealth management firm's goal is to help clients see that personal wealth management does not have to be complicated. Their team of financial planners in Indianapolis [can help clients](#):

- Consolidate their accounts
- Determine if different accounts are strategically working towards a client's goals
- Keep them focused on the long term
- Organize and review aspects of their financial picture

This Indianapolis wealth management firm also provides a software that allows clients to view their financial picture in an easy to understand format.

Financial Planning Services

Your financial plan is custom tailored based on both quantitative and qualitative information. This will establish the groundwork for the future and use this as a starting point. Like any good financial plan, it will be flexible, ongoing, and reviewed periodically to reflect personal and economic changes. Planning services [include](#):

- Investments

- Retirement
- College funding
- Income taxes
- Estate planning
- Insurance
- Employee benefits

Investment Management

Each and every investor who comes to Halter Ferguson has their own unique set of goals and risk tolerances. Halter Ferguson believes that the key to successful investing is being comfortable with the level of risk taken.

Your own risk tolerance will be assessed. To minimize your risk exposure and ensure diversification, a portion of investments are held [outside of the stock market](#).

A Small, Dedicated Team

The [team](#) at Halter Ferguson is small, but they have a wealth of expertise to offer their clients. Among their team of Indianapolis financial planners are Certified Financial Planners (CFP) and a Certified Financial Analyst (CFA).

Market Street Wealth Management Advisors, LLC Review

[Market Street Wealth Management Advisors, LLC](#) is an SEC Registered Investment Advisor (RIA) that serves business owners with [at least \\$250,000](#) in investable assets.

Their Indianapolis-based office serves clients throughout the area and in at least 12 other states. Services include comprehensive financial planning, customized investment portfolio strategies, and retirement plan consulting services.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Indianapolis

Below are key factors that enabled Market Street Wealth Management Advisors, LLC to be rated as one of the top wealth management firms in Indianapolis.

Independence

As an SEC Registered Investment Advisor (RIA), Market Street Wealth stands by you as your trusted, independent fiduciary at all times. They have absolutely no products to sell. For qualified retirement plans, they co-sign as a fiduciary to your plan.

Market Street is a [fee-only](#) wealth management firm in Indianapolis.

The Market Street Difference

There are many things that can differentiate one firm from another. Each has its own unique set of values and practices that they believe help them make the best decisions for their clients.

Below are some of the [key factors](#) that Market Street Wealth believes set them apart from their competition:

- Annual updates to your plan at no additional cost
- Integration and management of the clients' employers' retirement plans
- A focus on tax efficiency during all phases of planning
- Customized investment strategies for each individual client based on their specific needs
- Signing on as a co-fiduciary with the business owner for a qualified retirement plan

Managing All Facets of Your Wealth

As a business owner, you have access to both financial planning and integrated investment management services. Your financial plan will include a probability assessment of your financial goals and all plans are updated annually at no additional charge.

When approaching your investment portfolio, this top wealth management firm in Indianapolis seeks to optimize your investment portfolio's design to maximize the likelihood of reaching your financial goals. During all phases of managing your investments, there is a focus on tax efficiency.

Some of the [services](#) available to clients of this wealth management firm in Indianapolis are:

- Social security optimization
- Educational planning
- Investment portfolio management
- Retirement planning
- Debt analysis
- Life insurance adequacy analysis
- Disability income planning
- Long-term care planning
- Review of estate planning documents
- IRA and qualified plan distribution planning
- Roth IRA conversion analysis
- Gifting and charitable gift planning
- Stock option strategies
- Financial planning for dependents with special needs
- Divorce settlement planning
- Inherited wealth planning

Retirement Planning and Consulting Services

Being the person responsible for your company's retirement plan is a big undertaking. Luckily, Market Street Wealth can offer expert advice and stand with you as co-fiduciary for your plan. Their goal is to optimize the design objectives of your plan.

Through the use of independent Third Party Administrators (TPAs), they put an emphasis on representation from a variety of asset classes and fund families.

Your plan is continually monitored for performance and recommendations are made as needed. Furthermore, employee education is key for overall success and Market Street Wealth covers this as well.

[Read More: Best Financial Advisors in Omaha, NE | Ranking | Omaha Wealth Management Firms](#)

Ronald Blue & Company Review

[Ronald Blue & Company](#) is a wealth management firm in Indianapolis that offers Christian financial advising. Their aim is to guide clients towards financial security while also helping them to free up their money for charitable giving. Ronald Blue offers financial planning, investment management, and estate planning services to clients across the wealth spectrum with no asset minimum.

For over 35 years, Ronald Blue & Company has taken a more uncommon approach to wealth management through the integration of biblical wisdom in all they do. They are a [fee-only](#) wealth management firm in Indianapolis.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Indianapolis

Below are key factors that enabled Ronald Blue & Company to be rated as a top wealth management firm in Indianapolis.

The Ronald Blue Distinct Advantage

Knowing that everyone is different is only part of the solution. Ronald Blue has taken it a step further and created [four distinct divisions](#) that offer access to specialized advisors who are experts in their niche.

This wealth management firm in Indianapolis has the following divisions:

- [Private Wealth](#): This group offers comprehensive planning services to clients with an investable net-worth starting [around \\$1 million](#). This is the largest division in the firm.
- [The Family Office](#): Focusing on the complex needs of multiple generations, the Family Office division encompasses your family's mission and governs sophisticated trust and estate plans.
- [Professional Athlete](#): This division understands the unique set of challenges and requirements of professional athletes. Building and retaining wealth in a short career span is the main focus of this division. It includes cash flow management, estate planning, investment management, tax planning, risk management, and more.
- [Everyday Steward](#): The Everyday Steward division focuses on clients who are just starting on their financial journey and services include

everything from cash flow management to retirement. Clients in this category generally have a net worth of \$100,000 to \$1 million.

Your Financial Plan

The choices you make reflect your values and priorities and they affect all areas of your life, including your finances.

This Indianapolis wealth management firm's approach to your financial plan clarifies your decision-making process and focuses on leaving a legacy of financial, social, and spiritual capital.

Here's what you can expect:

- Short-term cash flow planning based on Ronald Blue's "five uses of money"
- Long-term retirement planning
- Philanthropic counsel
- Estate and trust planning
- Proactively minimizing debt
- Tax planning
- Education planning
- Insurance considerations
- Access to "BluePrint," a proprietary and multidisciplinary financial planning tool

Managing Your Investments

The primary objective in your plan is not just meeting financial goals, but rather increasing the probability that your goals will be reached.

This wealth management firm in Indianapolis does not compete against random benchmarks. They utilize a Principled Reasoning approach in all of their time-based portfolios. This approach stands on a foundation of:

- Environment: The principle of Uncertainty and Instability shows that economic environments are numerous and it's important to manage risk and reinforce the value of saving.
- Growth: The principle of Human Productivity, Leadership, and Governance allows insight into how and where growth will most likely appear.

- Valuation: The principle of Inherent Value allows Ronald Blue to analyze various asset types to build a disciplined portfolio.

Although they exclusively recommend external investment solutions, Ronald Blue never accepts commissions from any investment companies.

Institutional Services

If you have a privately-held family business, a non-profit ministry, or a public company with regulation-driven responsibilities, you most likely face challenges that include growth, governance, people, and more. This top wealth management firm in Indianapolis offers a variety of institutional services and will guide you through every step with the utmost fiduciary care. They offer:

- Business consulting services
- Institutional investment consulting
- Retirement plan consulting
- Employee financial planning advisory services

Valeo Financial Advisors, LLC Review

[Valeo Financial Advisors, LLC](#) boasts 31 Certified Financial Planners, a limit of 40 clients per advisor, and no products sold. All of these factors come together to bring a wealth management firm in Indianapolis that offers client-focused, independent advice.

Valeo Financial Advisors is a [fee-only](#) wealth management firm in Indianapolis.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Indianapolis

The following is a list of key factors that enabled Valeo Financial Advisors, LLC to rank as one of this year's top wealth management firms in Indianapolis.

One Transparent Fee

As part of a fee-only wealth management firm in Indianapolis, these financial advisors are upfront about how much their services will cost. Clients do not have to worry that they will be surprised by hidden fees. Clients receive one transparent fee based on their net worth.

This fee covers financial planning and investment management by these Indianapolis financial advisors. For added transparency, Valeo Financial Advisors make their [fee schedule](#) readily available on their website:

- First \$5,000,000 - 0.40% of net worth
- Next \$5,000,000 - 0.20% of net worth
- Over \$10,000,000 - 0.10% of net worth

Comprehensive Wealth Management

In order to meet the varied needs of proper wealth management, Valeo Financial Advisors offers a number of helpful services. Whether you are saving for your child's education, figuring out how your taxes will impact financial goals, or planning for retirement, Valeo has you covered by providing guidance in the [following areas](#):

- Income tax & cash flow
- Risk management
- Education funding
- Investments
- Estate planning
- Retirement

Up-to-Date Blog & Community Involvement

The Valeo Financial Advisor's website maintains a [blog](#) that provides news, tips, and industry insights. It covers several topics related to financial planning including personal finance, education, and the economy. Maintaining a consistent online presence is important for clients who want rich resources from the Indianapolis wealth management firm that manages their money.

Additionally, Valeo is involved in its community. Their areas of focus include food, shelter, education, and healthcare. They fund their community contributions through a combination of client donations and their own employee matching program. Through their efforts, they have raised [over \\$500,000](#).

Related: [Best Financial Advisors in Miami & Coral Gables, Florida](#) | [Ranking](#) | [Miami & Coral Gables Wealth Managers](#)

Wallington Asset Management, LLC Review

Celebrating over 25 years of wealth and investment management, [Wallington Asset Management, LLC](#) proudly serves high net-worth individuals, trusts and estates, foundations, corporations, and institutional clients.

Founded in 1988, they offer total wealth management services through their Indianapolis-based office, which include financial planning and investment management services.

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

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Indianapolis

The following is a list of key factors that enabled Wallington Asset Management, LLC to rank as one of this year's top wealth management firms in Indianapolis

Independence at the Forefront

Wallington Asset is a Registered Investment Advisor (RIA) founded on the principle of putting their clients before profit. Their Indianapolis financial advisors work to earn and maintain an essential element of trust.

Expert Leadership

The [team](#) at Wallington Asset may be small, but they have the expert knowledge and experience you need in order for a bright financial future. Among their credentials, you will have the power of Certified Financial Planners (CFPs) and Chartered Financial Analysts (CFAs) on your side.

The Wallington Philosophy

Each investment portfolio requires well-defined policies in order to produce long-term success. Wallington Asset's ultimate objective is to capture the unique financial goals of each client. Here, we will take a look at the facets of this Indianapolis wealth management firm's philosophy:

- Formulation: Working closely with their clients, Wallington Asset is able to take into account and establish critical factors such as risk, cash flow, return rates, and time horizons, while carefully listening to your needs and objectives.
- Common Stock: Through the employment of both value and growth stock philosophies, you have access to a blended investment approach that minimizes your overall risk. Wallington Asset likes to utilize underestimated stocks that have a high potential for return. Diversification is also important in preservation of capital.
- Fixed Income: High quality bonds and conservative maturity structures are the basis for Wallington Asset's four-phase approach to the management of fixed income portfolios. The four phases are income strategy, duration range, portfolio management, and continued monitoring.
- Reporting: Regardless if a client chooses to have assets deposited with a specific custodian or any member of the NYSE, Wallington Asset reports on an ongoing basis and continually monitors the performance of each portfolio individually.

This allows for nearly instantaneous reaction to any necessary changes, whether they originate from changes in the market or changes in the client's personal life.

Firm Objectives

Aside from the objectives mentioned above, these Indianapolis financial planners and advisors strives to offer superior investment management services specific to each client's needs and risk tolerances.

Conclusion – Top 10 Financial Advisory Firms in Indianapolis, Indiana

This review is meant to serve as a starting point. With this overview of what financial advisors in Indianapolis have to offer, you can begin thinking about which features are most important to you. It could be a focus on retirement planning, a fee-only structure, or faith-based wealth management.

As you make your decision, think about what you want to gain out of a relationship with your financial advisor. Are you looking for general direction? Have you gone through a major life change and feel like you don't know which direction you should go for? Do you need to plan for your retirement?

Making a list of what you want will allow you to match those wants and needs up with the services of one of the top 10 financial advisors in Indianapolis.

Once you've chose one or two prospects, check to see if they offer a free consultation, whether by phone or in person. This is a great way to start a working relationship and start getting professional answers from a financial advisor in Indianapolis.

AdvisoryHQ Disclaimer:

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