Top 9 Best Financial Advisors in Miami & Coral Gables, Florida | 2017 Ranking | Miami & Coral Gables Wealth Managers

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2017 RANKING & REVIEWS
TOP FINANCIAL ADVISORS IN MIAMI

Finding a Top Financial Advisor in Miami, Florida

Working with the right investment manager, wealth advisor, or financial planner in Miami and the greater Miami-Dade area, can mean the difference between a financial future you can feel confident about and a future filled with anxiety.

Partnering with a wealth management firm in Miami can also help you lock down the funds you need to comfortably retire at the age you wish, instead of continuing to work out of necessity.

So, why does finding the right financial planner in Miami make that much of a difference? It matters because they have the knowledge, experience, and expertise to help individuals optimize their savings over the long run.

Award Emblem: Top 9 Best Financial Advisors in Miami and Coral Gables, Florida

However, the real challenge lies in identifying and selecting a wealth management firm in Miami that is a perfect fit for an individual.

There are so many factors to consider and an equally large number of questions to ask. Sometimes, the search can become quite complex, especially when looking for financial planners or wealth management firms in Miami that have unique skills.

That's why we've created this useful resource of top wealth managers, investment management firms, and financial planners in Miami. Readers should carefully consider all of the information that we've summarized below and then reach out to the advisors that they believe will offer them the greatest value for their money.

AdvisoryHQ's List of the Top 9 Best Investment Managers and Financial Advisors in Miami

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

- **BigSur Partners**
- **Cathy Pareto & Associates Inc.**
- **Dimension Capital Management**
- **Evensky & Katz/Foldes Financial**
- **GenTrust, LLC**
- **Investor Solutions, Inc.**
- **Singer Xenos**
- **The Enrichment Group**
- **WE Family Offices LLC**

Top 9 Best Financial Advisors in Miami, Florida | Brief Comparison

Firm	Highlighted Features
BigSur Partners	Comphrensive FInancial Planning Services
Cathy Pareto & Associates, Inc.	Full-Service Investment Manager
Dimension Capital Management	Institutional Platform
Evensky & Katz/Foldes Financial	Availability of low-cost solutions
GenTrust, LLC	Comphrensive Web Access
Investor Solutions, Inc.	Evidence-based investment approach
Singer Xenos	Specialized advice for women and physicians
The Enrichment Group	The Enrichment Plan
WE Family Offices, LLC	Consolidated reporting

Table: Top 9 Best Wealth Management Firms in Miami | Above list is sorted alphabetically

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AdvisoryHQ's Selection Methodology

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

Please click here "AdvisoryHQ's Ranking Methodologies" for a detailed review of AdvisoryHQ's selection methodologies for ranking top rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Top Ranking Best Wealth Management Firms in Miami

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

See Also: Top Financial Advisors in Greensboro, Chapel Hill, and Winston-Salem, North Carolina

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BigSur Partners Review

BigSur Partners is an independent, boutique wealth manager and financial advisor in Miami. This Miami wealth management firm was founded in 2007. The founding partners were responding to the wishes of a few key clients who wanted a multi-family office in Miami.

Founders Ignacio Pakciarz and Rafael Iribarren decided to fill the huge void for client-centric wealth managers.

They created one of the top-ranked wealth management firms in Miami that catered to the unique investment and wealth management needs of high-net-worth and ultra high-net-worth individuals and families.

The hallmark of BigSur's business model is differentiation through:

- Independence in operations

- Customization of advice and services
- Transparency in client dealings
- Access to a unique and cost-effective set of products and services
- Flawless execution, monitoring, and communication

As a sought-after financial advisor in Miami for a niche clientele, the firm's strategic process has allowed its advisors to deliver conflict-of-interest-free services that many "traditional" wealth managers are unable to provide.

This Miami wealth management firm uses a "total balance sheet" approach, which takes into account the entire financial life of a family – not just the investment portfolio – to deliver value to its clients.

Big Sur is a fee-only wealth management firm in Miami.

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

The following factors were instrumental in BigSur Partners' inclusion on this list of the top wealth management firms in Miami.

Independence

As a well-established financial advisor in Miami, BigSur has retained its independence when providing advice to its clients. The company's advisors do not receive compensation from any third parties, which leaves them free to offer recommendations that are only in the best interest of their clients.

Customized Fee-Only Structures

BigSur Partners is a wealth manager in Miami that customizes its fees to address the unique needs of its clients. Fees are typically charged based on the value of portfolios and the performance of the underlying investments, with all rebates, from third-party products or services used, passed on to the firm's clients.

This fee-only billing model aligns the firm's interest with its clients.

Customized Services

Each client is unique, and that's where BigSur's Miami financial advisors use their knowledge and experience to differentiate themselves from other leading wealth management firms in Miami.

Portfolios for each client are customized based on a well-defined, 3-step investment process that addresses unique risk tolerance and investment objectives.

As a one-stop shop wealth management firm in Miami, BigSur is able to customize its service delivery by bringing together an array of partners, including accountants, tax experts, bankers, attorneys, and real estate specialists, to create a uniquely personalized portfolio of client-centric services.

Selective Clientele

Due to the selective nature of its services, this Miami wealth management firm deliberately restricts the type and nature of clients that it serves.

This is echoed by the firm's "class – not mass" approach to providing client-centric service, which results in a more focused client experience.

Better Access to Cost-Effective Products and Services

As one of the leading wealth managers in Miami, BigSur Partners strives to offer extremely cost-effective products and services to its clients. Such economies are usually only accessible by institutional investors.

Cathy Pareto & Associates Inc. Review

Cathy Pareto & Associates Inc. is an independent investment manager and financial advisor based in Coral Gables, a city in Miami-Dade County.

This Miami wealth management firm was founded by Cathy Pareto.

With her diverse experience in investment management, retirement planning, asset allocation, estate planning coordination, asset allocation and protection, and more, this Miami financial advisor been assisting affluent investors accomplish their financial goals for over 25 years.

The company supports clients from across a broad segment of society, including retirees and soon-to-be retirees, women, small business owners, dentists, and physicians.

As one of the top financial advisors in Miami, Cathy Pareto & Associates works with clients through various life stages, delivering advice and recommendations to those:

- Working to retire
- Nearing retirement
- Retiring imminently or already retired
- Going through the process of a divorce
- Dealing with the loss of a loved one or spouse

The firm has been recognized among the top investment advisors and financial planners in Miami on several occasions:

- Named by *Forbes* in 2008 as one of the "Top Ten Most Dependable Wealth Managers for Women in the U.S."

- Included in the "Top 250 Wealth Advisors" list by *Worth* magazine in its October 2008 edition

- Honored by the *South Florida Business Journal* in its 2008 "40 Under Forty" list, which recognizes the best and brightest under-40-year-old talent in the region for their professional accomplishments

Pareto has been widely published in financial media including Yahoo Finance, Forbes.com, CNBC, NBC, Fox Business News, Florida Medical Business, Women in Business, AccountantsWorld.com.

This accomplished Miami financial planner also serves as an expert witness for both respondents and claimants during mediations, arbitrations, and litigations that call for her special expertise.

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

The following were considered key factors in rating Cathy Pareto & Associates Inc. as a top wealth management firm in Miami.

Independent, Fee-Only Advisor

Cathy Pareto & Associates Inc. is an independent, fee-only investment manager and financial advisor in Miami. This gives clients of this Miami wealth management firm the peace of mind of knowing that they will receive unbiased advice. They can also feel comfortable considering a wider selection of opportunities that fit their needs.

Broad-Based Clientele

Though based in Coral Gables, Cathy and her team not only serve clients as financial advisors in broader Miami, but across the United States and internationally as well.

More Than a Financial Advisory

As a full-service investment manager and financial planner in Miami, Coral Gables-based Cathy Pareto & Associates Inc. does more than just create financial plans for its clients.

The company advises and assists clients on a range of everyday financial matters, such as buy versus lease decisions, insurance and protection needs, home ownership concerns, retirement planning, investment decisions, and much more.

Experienced and Qualified Team

The firm’s clients are served by a team of highly qualified and accredited financial advisors in Miami that carry a range of credentials, including BBA, MBA, CPA, CFP®, and many other graduate and post-graduate degrees.

Don't Miss: Top Financial Advisors in Phoenix and Scottsdale, Arizona

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Dimension Capital Management Review

Established in 1980 as a family office, Dimension Capital Management is a privately-owned boutique investment advisory and wealth management firm in Miami. In 1997, the company received approval from the U.S. Securities and Exchange Commission (SEC) to operate as a Registered Investment Adviser (RIA).

As a top-ranked investment manager and financial advisor in Miami, the Dimension team caters to the unique needs of high-net-worth institutional investors, families, and individuals across the US.

This Miami wealth management firm delivers exceptional value to its clients' portfolios by actively monitoring and managing local (domestic) and global exposures and executing strategic and tactical shifts to portfolio accordingly.

This proactive approach helps protect, grow, and preserve client wealth legacies for generations to come.

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

Below are some key factors that enabled Dimension Capital Management to be rated a top wealth management firm in Miami.

Registered Investment Advisor (RIA)

With over 3 decades of experience, Dimension Capital Management is one of the top registered investment advisory firms in Miami, delivering independent advice and services to its clients.

Fee-Only Investment Advisor

As a fee-only wealth manager in Miami, the firm only receives compensation from the clients it advises. Clients are not charged brokerage fees or commissions. This means that the firm's interests are always aligned with those of its clients while clients are always assured of receiving unbiased advice from the Dimension team.

Customized Approach

As a dynamic wealth manager and financial advisor in Miami, Dimension Capital Management has the experience to offer highly objective and customized solutions to its clients. As a result, portfolios are personalized based on clients' unique financial goals and objectives.

Highly Experienced in Complex Situations

The depth of experience that Dimension Capital Management advisors possess makes the advisor one of the premier Miami wealth management firms, with the ability to design and implement complex investment and wealth management solutions for its clients. These strategies are tailored to a level of sophistication determined by individual client needs.

Comprehensive Portfolio of Service

As a truly global wealth manager and financial advisor in Miami, the Dimension team offers a comprehensive set of services to clients, both in the U.S. and overseas.

Through a network of third-party professionals, this Miami wealth management firm is able to broaden its core competencies to include trust services, estate planning, tax advisory services, and much more.

Institutional Platform

Dimension Capital Management employs institutional-level strategies to monitor money managers, delivering superior performance while lowering investor risk. Clients of these Miami financial advisors receive aggregated statements and reports that consolidate their various accounts across brokerages, banks, and custodians.

Evensky & Katz/Foldes Financial Review

Evensky & Katz/Foldes Financial is based in Coral Gables. This Miami wealth management firm operates on a fee-only basis.

In addition to Coral Gables, Florida, the firm also has an office in Lubbock, TX.

As a highly innovative and dynamic wealth manager and financial advisor in Miami, the Evensky & Katz/Foldes team continually evolves to deliver increasingly sophisticated investment and financial planning advice, products, and services to its clients.

In this vein, a new specialized financial planning service program was established in the mid-1990s to support high-net-worth individuals and families with their unique wealth management and financial planning requirements.

As a full-service Miami wealth management firm, the team provides its affluent clients a wide range of specialized services:

- Wealth management
- Retirement planning
- Estate planning
- Income tax planning
- Insurance planning

- Support for their other financial planning and advisory needs

The company also provides support for qualified retirement plans, including 401(k)s, SEP plans, and profit-sharing trusts for business and corporate clients.

As a top wealth manager in Miami, the firm uses a structured process to identify, quantify, and prioritize client financial goals, followed by the creation, implementation, and monitoring of personalized strategies that realize those objectives over the long term.

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

The following key factors enabled Evensky & Katz/Foldes Financial to be rated as a top wealth management firm in Miami.

Registered Investment Advisory Firm

As a Registered Investment Advisor (RIA), Evensky & Katz/Foldes Financial is legally and professionally held to a much higher fiduciary standard of client accountability by financial regulators.

This delivers additional peace of mind to its clients who know that they can expect independent and unbiased advice from the firm's Miami financial planners.

Fee-Only Advisory Services

As a fee-only financial advisor in Miami, this Coral Gables, FL-based firm’s revenues are derived entirely from fees generated through its client relationships.

The company uses investment products that carry no commissions, and, as such, there are no conflicts of interest with third-party associations or with the sale of other proprietary products.

Impressive History

Evensky & Katz/Foldes Financial has been around for over 3 decades, having celebrated its 30th anniversary in the financial industry in 2015. Over the years, the company has emerged as one of the top Miami wealth management firms, serving 800+ clients and managing discretionary assets in excess of $1.6 billion.

Wide Range of Investment Solutions

Due to its status as an independent Registered Investment Advisor in Miami, the Evensky & Katz/Foldes Financial team is able to offer low-cost, "best of breed" solutions, with a wide range of providers available for its clients. These opportunities are not available to clients of advisory firms aligned with big banks or other large money management corporations.

Related: Best Financial Advisors in Atlanta, GA | Ranking | Atlanta Area Wealth Managers

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GenTrust, LLC Review

GenTrust, LLC was founded in 2011 by a group of like-minded institutional investors, with the original purpose of bringing the rigor of institutional investing accountability and streamlined processes into the private wealth management domain.

As a top-ranked registered investment advisory firm in Miami, the company now counts not only institutional investors but also private individuals and other Registered Investment Advisors among its clients and manages upwards of $1 billion on their behalf.

Each of GenTrust's client segments benefits from their relationship with a full-service financial advisor in Miami:

- Ultra high-net-worth families and individuals who are able to access a range of unique and cost-effective investment services and solutions, including financial planning, alternative investments, asset allocation, charitable giving, and municipal bond management
- Institutional investors, including corporate treasuries, central banks, and endowments and foundations, gain access to innovative investment strategies that were previously only accessible through large money management corporations

- Registered Investment Advisors (RIAs) who, in collaboration with a renowned Miami wealth management firm like GenTrust, now have access to a highly flexible and secure operating platform to support their clients' fixed-income and traditional equity portfolios

GenTrust also does not have physical possession of securities held inside client portfolios, which are held in custody either by Fidelity, the firms' primary custodian, or by other custodians designated by the clients themselves.

GenTrust does not clearly indicate whether they are a fee-only or fee-based firm. We have included them on this list of wealth management firms in Miami for the range of services they offer, however, customers should iquire about their compensation structure during their consultation.

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

The following are some important considerations that made it possible for GenTrust, LLC to be rated as a top wealth management firm in Miami.

Registered Investment Advisory

As a Registered Investment Adviser (RIA), GenTrust is held accountable to a much higher fiduciary standard than non-RIAs.

The fiduciary standard means that all of the advice and recommendations made by GenTrust's Miami financial advisors must be in a client's best interest, with no conflicts of interest among the advisors, the advisory firm, and the clients they serve.

Strong Support for Institutional Investors

The Miami financial advisors at Gen Trust offer institutional investors a range of cost-efficient investment strategies and options, such as alternative investments, alternative beta strategies, and risk parity portfolios, which they previously had to access at much higher costs through other asset management firms.

Institutional Expertise for Private Clients

GenTrust is an exceptionally skilled Miami financial advisory firm that brings institutional-level investing and wealth management skills to private clients.

Convenient & Comprehensive Web Access

Clients looking for a wealth management firm in Miami that offers them convenience will find the GenTrust website an exceptionally handy tool.

Through it, users can access and log into accounts for various GenTrust partners and associates, giving them a single point to access all of their accounts under one roof.

Investor Solutions, Inc. Review

With over 20 years in the business, Investor Solutions, Inc. is a Registered Investment Advisor in Miami that provides a range of investment advisory services to a broad range of clients:

- Corporate retirement plan sponsors
- Trusts
- Individuals
- Families
- Non-profit organizations

The firm was founded as a result of a very personal and moving encounter that founder and CEO Frank Armstrong had while working as a mail delivery man in 1964 in Washington, D.C.

While collecting payment for postage, Mr. Armstrong watched an elderly woman pay for her 2-cent postage fee by reaching into her sugar jar that only contained 3 cents. It was this encounter that moved him to build a career as a Miami financial advisor helping others properly manage their money.

Years of education, training, and frontline working experience finally realized Mr. Armstrong's dream. The result was the formation of Investor Solutions, Inc. in 1993.

Today, as one of the top Miami financial planners, the company is resolute in helping its clients by making the markets work for them. This determination is clear in the company's motto:

"No commissions. No distractions!"

As a Registered Investment Advisor in Miami, Investor Solutions, Inc. strictly adheres to its core principles of professionalism, integrity, and service to deliver on its mission of helping clients reach their investment objectives.

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

The following factors were key to enabling Investor Solutions, Inc. to be rated as a one of the best Miami financial advisory firms.

Registered Investment Advisor (RIA)

Investor Solutions, Inc. is a registered investment advisory firm in Miami that has pledged to uphold the fiduciary standards of providing advice and recommendations that are always in its clients' best interests. Neither the firm nor its individual advisors benefit from any of the recommended actions, and the advice is delivered without any conflict of interest.

Independent Fee-Only Advisor

As one of the top financial planners in Miami, the company operates as a fee-only firm and independently of any third-party affiliations or associations. Clients pay this Miami wealth management firm for services rendered. The firm accepts no referral fees or commissions for the sale or purchase of any affiliated products or services.

Highly Qualified and Experienced Team

The company is staffed by a team of Miami financial advisors and support staff with industry-recognized credentials. Additionally, the team brings decades of frontline experience to the table at each client interaction.

Evidence-Based Investment Approach

Investor Solutions, Inc. is a Miami financial advisor that delivers value to clients through the knowledge and expertise of its advisors, which includes employing the latest research when building investment strategies for its clients. This approach results in extremely cost-effective, low-risk, tax-efficient investment decisions which promise the highest returns.

Center of Excellence

In addition to being a leading wealth management firm in Miami, the company is a center of excellence in the management of the financial planning and investment management needs of high-net-worth individuals, families and trusts, foundations, and corporate pension plans globally.

Popular Article:* *Best Financial Advisors in Pittsburgh, PA | Ranking | Pittsburgh Wealth Management Firms

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Singer Xenos Review

Singer Xenos has been regarded as one of the most trusted financial advisors in Miami for over 27 years. This company is a fee-only wealth management firm in Miami.

Singer Xenos is a highly regarded Miami wealth management firm, having earned numerous awards and accolades from industry watchers, financial media, and other leading professional institutions.

This impressive list of recognitions, for being one the top Miami wealth management firms, stretches back to 2001 when the firm was recognized by *Worth* magazine in its exclusive list of "The 150 Best Advisors for Doctors."

Since then, the Singer Xenos team has consistently earned the respect of peers and industry colleagues in the form of ongoing awards and recognitions.

Some of the more recent recognitions include:

- Being ranked among the 100 most exclusive wealth advisors by *Worth* magazine
- Founder Faith Read Xenos being named as one of *Barron's* top 100 women advisors
- Being named to *The Financial Times*' list of "Top 300 Financial Advisers for 2014"
- Named to WealthManagement.com's list of "Top 10 Women RIA Owners in 2013"
- Receiving the 2013 "Industry Innovator in Human Capital Management" award

- Faith Read Xenos being a multi-year recipient of the “Top 100 Women Financial Advisors” reorganization

As highly-focused wealth managers in Miami, the company operates specialized divisions of professional teams that cater to the unique needs of a select clientele of affluent individuals:

- Women
- Physicians
- Entrepreneurs
- International professionals

The company brings together a highly experienced, multi-disciplined team of professionals to deliver a fully-integrated range of personalized services to its clients.

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

The following factors enabled Singer Xenos to be rated as a top wealth management firm in Miami.

Registered Investment Advisor (RIA)

Singer Xenos is a registered investment advisory firm in Miami that is regulated by the U.S. Securities and Exchange Commission (SEC) and is legally and professionally bound to always act in a client’s best interest.

All advice delivered is, therefore, provided in the firm’s capacity as fiduciaries to its clients.

Independent Advisor

The company is one of the top-rated financial advisory firms in Miami and operates independent of any other third-party affiliations.

What this means is that clients are not pressured into buying specific products that may benefit the firm, and the firm is not limited to advising clients only on a restricted set of products or services. Clients benefit from a wide array of solutions that may provide benefits to them.

Reduction in Overall Administrative Costs

By operating as an independent wealth management firm in Miami, the company is able to offer much lower operating and administrative costs to its clients, which trickle down directly into maximizing client account values.

For wealth management firms in Miami that operate on multi-layered fees and commission structures, this kind of cost savings is normally not available.

Highly Experienced Team

As a leading Miami Registered Investment Advisor, the company's team is comprised of professionals with a wide range of experience and expertise, including investment banking, financial planning, corporate law, bankruptcy law, and estate tax planning law.

The Enrichment Group Review

The Enrichment Group was founded in 1987 and offers a broad array of services to its clients. The establishment of an independent firm of financial planners and investment advisors was a very personal mission for founder Kathleen Day.

As a long-time banker, Kathleen found the "banker's approach" to helping clients to be very impersonal and cold. As a passionate advocate of empowering her clients, Ms. Day therefore decided to become an independent financial planner in Miami in order to deliver highly personalized services to her clients.

The Enrichment Group team follows a disciplined process in advising its clients and managing client assets. This process is based on offering:

- Life planning services to assist clients in clarifying their life goals and achievements
- Transition planning services to prepare clients to deal with unexpected "curve balls" that life may throw at them
- Portfolio management services to help clients preserve, enhance, and manage their wealth

As a highly diverse firm of Miami financial planners, this integrated approach is used to deliver a wide array of services to fill individualized client needs.

SERVICES OFFERED

Depending on your needs, we may offer some or all of the below services.

- Investment Goal Setting
- Perpetual Paycheck
- Initial Holistic Planning Meetings
- Annual Planning Review Meetings
- Priority Access to Planners
- Savings Recommendations
- Retirement Planning & Projections
- Education Planning and Funding
- Risk Management and Insurance Planning
- Financial Transition Planning–Divorce, Loss of Spouse, etc.
- Estate Document Review and Recommendations
- Income Tax Planning
- Investment Policy Statement
- Monitoring and Rebalancing
- Goal Setting for Lifetime Objectives
- Planning Updates as Needed
- Cash Flow & Spending Review
- Net Worth Analysis
- Scenario Testing
- Coaching for Financial Decisions
- Coordination with CPA, Attorney and/or Family Members
- Employee Benefit Review and Recommendations
- Charitable Giving & Family Legacy Planning

The September 2015 joining of forces between The Enrichment Group and Pinnacle Advisory Group, Inc. has created an even more powerful registered investment advisory firm in Miami.

This combined enterprise brings a much broader range of expertise and services to clients of the combined entity.

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

The following factors enabled us to rank The Enrichment Group as a top wealth management firm in Miami.

Independent Registered Investment Advisor (RIA)

As one of the top registered investment advisory firms in Miami, The Enrichment Group acts independently of any other organizations when advising its clients.

Clients receive no pressure to buy any products or services. Their Miami financial advisor are free to recommend products and services that meet a client's needs from across a broad universe of offerings.

Fee-Based Services

The Enrichment Group is a fee-based financial planner in Miami. Their compensation is directly tied to the services it delivers and the value it adds to its clients. The company does not receive any other commissions from referrals or remuneration from product sponsors.

Fiduciary Responsibility

In its role as a Miami Registered Investment Advisor, The Enrichment Group is legally and professionally committed to acting as fiduciaries to its clients. What this means is that clients can expect advice and recommendations that are solely in their best interest.

Highly Diversified Portfolio of Services

Under its umbrella of core offerings, which includes its Life Planning Services, Transition Planning Services, and Portfolio Management Services, the company offers a choice of 20+ services that clients can pick and choose from.

The Enrichment Plan

The Enrichment Plan is a four-step financial planning process offered by this wealth management firm in Miami. This step-by-step path helps clients feel involved and knowledgable about what their Miami financial advisors is doing.

Step 1: Visualization to figure out what your financial goals and priorities are.

Step 2: Strategically map out how you will feasibly reach those goals. This process means answering tough questions about what sacrifices you'll need to make, how much you will need to save, and whether you are making tax-efficient decisions or not.

Step 3: Implement of that strategy by your Miami financial planner so that you can get started working towards those goals. This includes ensuring you have a solid investment portfolio that is customized to your goals and specific risk tolerance.

Step 4: Refine your plan based on changes to your life and financial situation. This may include changes to your income, one of your children going away to college, retirement, and more.

Proven Proprietary Investment Strategy

The Enrichment Group is a wealth management firm in Miami that has developed a proprietary investment strategy that works. Since 2002, the company's financial advisors in Miami have been using a blend of portfolio diversification used by traditionalists with a healthy dose of active management to construct highly personalized and effective client portfolios.

Read More: Best Financial Advisors in San Antonio and New Braunfels, Texas

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WE Family Offices LLC Review

WE Family Offices LLC was founded in 2000 as TBK Investments. They are a fee-only, independent wealth management firm in Miami that advises on approximately $6.8 billion of assets.

Their name stands for Wealth Enterprises, fitting considering their mandate of helping individuals effectively build their wealth the way you would cultivate a business enterprise.

The company is a Miami wealth manager that offers a broad array of family office services to ultra, high-net-worth (UHNW) families:

- Wealth enterprise mapping
- Financial and wealth planning
- Investments
- Management of all your financial services providers
- Family education and governance

- Reconciliation
- Consolidated reporting
- Quality control

At the heart of delivering these services to its clients is the belief that no two families are alike. Therefore, client families are served through a personalized blend of services in order to help them build their unique wealth enterprise.

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

The following key considerations enabled us to rank WE Family Offices LLC as a top wealth management firm in Miami.

Independent Advisor

As an independent wealth manager in Miami, the firm is paid exclusively by its clients. By having no affiliations or associations with money managers or investment product providers, WE Family Offices LLC is perfectly positioned to deliver unbiased, conflict-of-interest-free advice to its clients.

Best Practices

The firm's advisory team acts as independent wealth managers in Miami, bringing with them over 70 years of collective wealth management experience and industry best practices when delivering services to help families build their personal wealth enterprise.

Structured Processes

WE Family Offices LLC is a financial advisor and wealth manager in Miami that uses a highly structured approach to wealth management. The process starts with a detailed diagnostic of a client's current wealth status and subsequently identifies and delivers all of the services and support needed to maintain, grow, and manage that wealth.

Consolidated Reporting

Clients with considerable wealth often tend to lose track of their fortunes, and this can sometimes lead to missed opportunities. Through its data aggregation process, WE Family Offices LLC acts as the Miami wealth management firm that brings all of a client's wealth under "one roof". This enables a client to have a consolidated view of their entire financial picture.

Conclusion – Top 9 Financial Advisory Firms in Miami and Coral Gables, Florida

Now that you are better informed about these leading Miami financial advisors, it's time for you to act. Reviewing this list of the top wealth management firms in Miami should help you gain a clearer understanding of what you do and do not want in a financial advisor.

You can then book your consultations equipped with the information you need to ask the right questions to choose the best financial advisor in Miami for you.

Related: Best Financial Advisors in Indianapolis, Indiana

Image Sources:

- http://www.bigsurpartners.com/services/overview
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