

Top 10 Financial Advisors in Franklin, Memphis, & Nashville, TN | 2017 Ranking | Franklin, Memphis, & Nashville Wealth Managers

2017 RANKING AND REVIEWS TOP RANKING FINANCIAL ADVISORS IN NASHVILLE AND MEMPHIS

Finding a Top Financial Advisor in Nashville and Memphis, Tennessee

Nashville and Memphis are two cities in Tennessee that are rich with history and culture. Visiting either city is a marvellous opportunity to soak up the local food and music scene. For those who are living and working in these well-known cities in Tennessee, finding a financial advisor in Nashville and Memphis is a great way to grow their wealth and secure their future in the place they love.

For people across the country, financial independence or, at the very least, financial security is the new American Dream. Even those who have managed to acquire a significant amount of wealth may find themselves in for a nasty surprise if they do not organize their finances correctly. A wealth management firm in Nashville or a financial advisor in Memphis can help professionals, business owners, and entrepreneurs get on the road to financial success and security.



Award Emblem: Top 10 Best Financial Advisors in Memphis and Nashville

AdvisoryHQ's List of the Top 10 Best Financial Advisors in Nashville and Memphis, Tennessee

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

- [**Abound Wealth**](#)
- [**CapWealth Advisors, LLC**](#)
- [**Family Wealth Management, LLC**](#)
- [**Legacy Wealth Management**](#)
- [**Prium Investment Management, Inc.**](#)
- [**Reliant Investment Management, LLC**](#)
- [**Silverleaf Capital Partners, LLC**](#)
- [**Summit Asset Management**](#)
- [**Waddell & Associates, LLC**](#)
- [**Woodmont Investment Counsel, LLC**](#)

Top 10 Financial Advisors in Nashville & Memphis, TN | Brief Comparison

Financial Advisors in Memphis & Nashville	Highlighted Features
Abound Wealth	Will work with clients virtually
CapWealth Advisors, LLC	Family wealth planning
Family Wealth Management, LLC	Income tax planning and compliance
Legacy Wealth Management	Specialized financial planning
Prium Wealth Management, Inc.	Prium Global Portfolios
Reliant Investment Management, LLC	Discretionary Portfolio Management
Silverleaf Capital Partners, LLC	Strategic Lifestyle Planning
Summit Asset Management	Comprehensive Financial Planning
Waddell & Associates, LLC	Investment compass
Woodmont Investment Counsel, LLC	Several case studies

Table: Top 10 Best Financial Advisors in Memphis and Nashville | 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 Financial Advisors in Nashville & Memphis, TN

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

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

Abound Wealth Review

[Abound Wealth](#) is a financial advisory firm in Franklin, Tennessee, a city right outside of Nashville. This Nashville area wealth management firm offers wealth planning services that keeps things "smart and simple."

They emphasize low cost, low taxes, and longevity when dishing out financial planning advice. Built on a basis of stewardship and family, these Nashville-area financial advisors take the time to identify what is important to their clients so that they can diligently work towards accomplishing their goals.

Abound Wealth is a [fee-only](#) financial advisory firm in the Nashville area.



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

The following is a listing of key factors that allowed Aboudn Wealth to rank as one of this year's top wealth management firms in the Nashville area.

Fee-Only Wealth Management Firm

People don't mind paying top dollar for top advice. What they do mind is paying top dollar for someone to sell them a product that does not work in their best interests. This is one of the pitfalls of the financial advisory industry. How do you know whether or not a professional is hawking a product simply because they receive a commission?

This is why it helps to work with a fee-only wealth management firm in Nashville or Memphis. In this case, the firm only receives compensation via the fee you pay them, and that fee is usually a percentage of the assets they manage for you.

This means that their success is directly tied to your success. The better their advice, the more likely you are to come back, and the more returns they help you realize the higher the value of the assets they charge a percentage on.

Abound Wealth is a fee-only financial advisory firm in the Nashville area. As a result, clients can count on unbiased, objective advice from their Nashville area financial advisor.

Highly Qualified Team

Abound Wealth boasts a highly qualified team of financial advisors in the Nashville area. There are a number of industry certifications among their team members like Certified Financial Planner, Chartered Professional Accountant, Chartered Financial Analyst designation and more.

The bios on the website are also structured in an interesting way. Each Nashville-area financial advisor at Abound Wealth has a professional bio and a personal bio with fun facts about themselves. While qualifications and experience are very important, it's a given that most advisors anywhere will have them. When you're choosing someone to work with closely on a regular basis, understanding who they are as people can be helpful for the decision-making process. These personal bios add a human element to money management.

Simple and Smart Wealth Management

This wealth management firm in the Nashville area provides what it calls simple and smart financial advice. Their mission is to provide a safe haven for people looking for intelligent, no nonsense wealth management that is free from sales pitches and quotas.

Their Nashville-area financial advisors work for clients, not outside interests that are developing financial products for sale. They believe in acting as a "personal CFO" for clients by helping them manage every area of their financial lives. This Nashville-area wealth management firm provides unique plans that are specifically tailored to the needs of their clients as opposed to trying to squeeze individuals into cookie cutter solutions. Additionally, they are diligent about keeping costs and taxes low.

What more, this firm will work with clients [either locally or virtually](#), bringing their financial advice to wherever they are whether it's in Nashville, Memphis, or on the other side of the country.

CapWealth Advisors, LLC Review

[CapWealth Advisors, LLC](#) is a wealth advisory and financial planning firm located just 15 minutes south of Nashville in Franklin, Tennessee. It offers a variety of services to individuals, families, institutions, and foundations, including portfolio management, retirement planning, and tax consultation.

With clients in 32 states and 4 foreign countries, CapWealth works with over [\\$1 billion](#) in assets under management.

CapWealth is a fee-based wealth management firm in the Nashville area, but we have included them on this list for the range of services they provide.

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

The following is a listing of key factors that allowed CapWealth Advisors, LLC to rank as one of this year's top wealth management firms in the Nashville area.

Sophisticated Simplicity Approach

CapWealth's Investment Committee oversees all asset management research. Through its expert analysis, this wealth management firm in the Nashville area has created its own Sophisticated Simplicity model which incorporates macro-economic data and analysis into a wide range of exotic, alternative, and private investment landscapes. Independent discovery allows CapWealth to be a catalyst for:

- Change in competitive position
- Corporate restructuring
- Potential for earnings
- Hidden or unrealized value
- A theme-driven nature
- Exceptional management
- New product development and technology advancement

Lifestyle & Wealth Management

Proactive investment management isn't just about stocks. As clients face inevitable changes through each stage of life, their needs change as well. CapWealth understands this and will be there to help through life's

transitions. The following situations may require extra support from these Nashville-area financial planners:

- Divorce
- Marriage
- Estate planning
- Retirement planning
- Death in the family
- College planning
- Job change
- Disability and health planning
- Birth of a child or adoption
- Major inheritance

Breakdown of Services

Here, we will take a brief look at the variety of services offered through CapWealth. Each group of services is backed by the knowledge and expertise of the firm and its team of Nashville-area financial advisors:

- Tax Planning: This wealth management firm in the Nashville area provides integrated tax planning and income tax design.
- Family Wealth Planning: This firm helps preserve intergenerational wealth, educate the younger generation on good stewardship, and fosters cooperations within the current generations.
- Investment Services: As you enter CapWealth's vast world of investments, you'll have the opportunity to work with your advisor in order to establish investment objectives, rebalance your portfolio, coordinate with other professionals, plan for insurance, and more.
- Retirement Income & Distribution Planning: It's never too early to plan for your retirement. A retirement plan through CapWealth covers all aspects of retirement, including an analysis of your current and future situation, ongoing reviews of IRA beneficiaries, tax planning and asset management, and more.
- Client Services & Communication: Good communication is essential to financial success. Not only will you have access to cutting-edge information on the market, economics, and laws, you will also have the

option to be included in seminars on tax planning, estate planning, and other financial topics.

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

Family Wealth Management, LLC Review

[Family Wealth Management](#) first began operating with one goal in mind – to serve the complex financial needs of Ambassador Joe M. Rogers and his family. In [1998](#), this Nashville wealth management firm formally became Family Wealth Management and began extending the same great legacy of service to individual clients, families, and non-profit organizations.

Today, Family Wealth Management is a boutique-sized, independent, and [fee-only](#) firm located right in Nashville, Tennessee, offering a full suite of financial services, including portfolio management, financial planning, and retirement planning.

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

What follows is a listing of the key factors that allowed Family Wealth Management, LLC. to rank as one of this year's top wealth management firms in Nashville.

Solid Philosophy

In all it does, Family Wealth centers itself around a set of simple yet important driving philosophies which it incorporates into all of its business practices. These philosophies are based on this Nashville wealth management firm's commitment to being:

- [Independent](#): You never need to worry that your success is being compromised due to a conflict of interest.
- [Integrated](#): Total wealth management through a comprehensive, expertly curated approach.

- Team-Based: A richly diverse team with longstanding ties to the firm and its community.

Custom Tailored Experience

Each service offered by Family Wealth Management is meant to provide a customized experience.

The needs of each and every client coming through the door of this wealth management firm in Nashville vary and, as such, the firm recognizes the need for a unique approach.

These financial advisors in Nashville utilize multi-disciplinary tools and a comprehensive review process to customize some of the following [services](#):

- Portfolio management
- Income tax planning and compliance
- Wealth succession planning
- Family philanthropy
- Risk management
- Accounting and record keeping
- Ancillary management services

An Expert Edge

Whether the focus is on Managing Director [Steve Thorne](#) or Certified Financial Planner [Kimbrelly Eades](#), it is evident that this Nashville wealth management firm stands strong with a mix of professional experience and personal history that creates a richly diverse setting for important work to be done.

Each member of the Family Wealth Management team contributes to the overall success of not only the firm, but of its clients as well.

Legacy Wealth Management Review

[Legacy Wealth Management](#) combines unparalleled financial planning services along with expertly led portfolio management. In fact, this year marks

the impressive [35 years](#) spent offering this completely seamless, comprehensive experience for each client. Located in Memphis, Tennessee, it serves clients in states all over the northern United States.

Legacy Wealth is a [fee-only](#) wealth management firm in Memphis.

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

What follows is an overview of key factors that allowed Legacy Wealth Management to rank as one of this year's top wealth management firms in Memphis.

Independence on Display

Legacy Wealth proudly serves as an employee-owned, SEC-registered, independent wealth management firm. This wealth management firm in Memphis offers commission-free services on a fee-only basis, meaning you know your costs up front, and there is never a hidden fee or agenda.

Specialized Services

Legacy Wealth caters custom services to a variety of clients. Financial planning can be a complex matter, especially when you are a business owner or work in a particular field. This wealth management firm in Memphis can provide specialized financial planning for:

- Physicians
- Attorneys
- Widowers/heirs
- Retirees
- FedEx pilots
- Entrepreneurs
- Executives
- Other professionals

Financial Plan

Legacy Wealth works through a multitude of facets to create a comprehensive financial plan for each client. Expert knowledge, combined with practical and effective solutions, allow this Memphis wealth management firm to extend the [following services](#):

- Tax planning
- Estate planning
- Retirement planning
- Insurance planning
- Other planning

Portfolio Management

An appropriately managed investment portfolio contains inner workings which are closely tied to your financial plan. By identifying your investment objectives and creating a clear plan to develop those objectives into tangible success, Legacy Wealth is able to [offer](#):

- Institutional quality investments
- Rigorous investment selection
- Asset allocation strategies
- Tax-efficient portfolio construction
- Monitoring and reporting

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

Prium Investment Management, Inc. Review

[Prium Investment Management, Inc.](#) is an investment management firm in the Nashville area located in Franklin, Tennessee. Its goal is "making the world safe for ordinary investors." This is important because, oftentimes, minimum asset requirements tend to hover in the half-million-dollar range, and where does that leave everyone else?

Prium believes that everyone should have access to top-notch investment services. For this reason, this Nashville-area financial advisory firm accepts clients with almost any minimum they want to invest, as long as the starting point is at a couple thousand dollars.

Prium is a [fee-only](#) wealth management firm in the Nashville area.

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

What follows is a listing of the key factors that allowed Prium Investment Management, Inc. to rank as one of this year's top wealth management firms in the Nashville area.

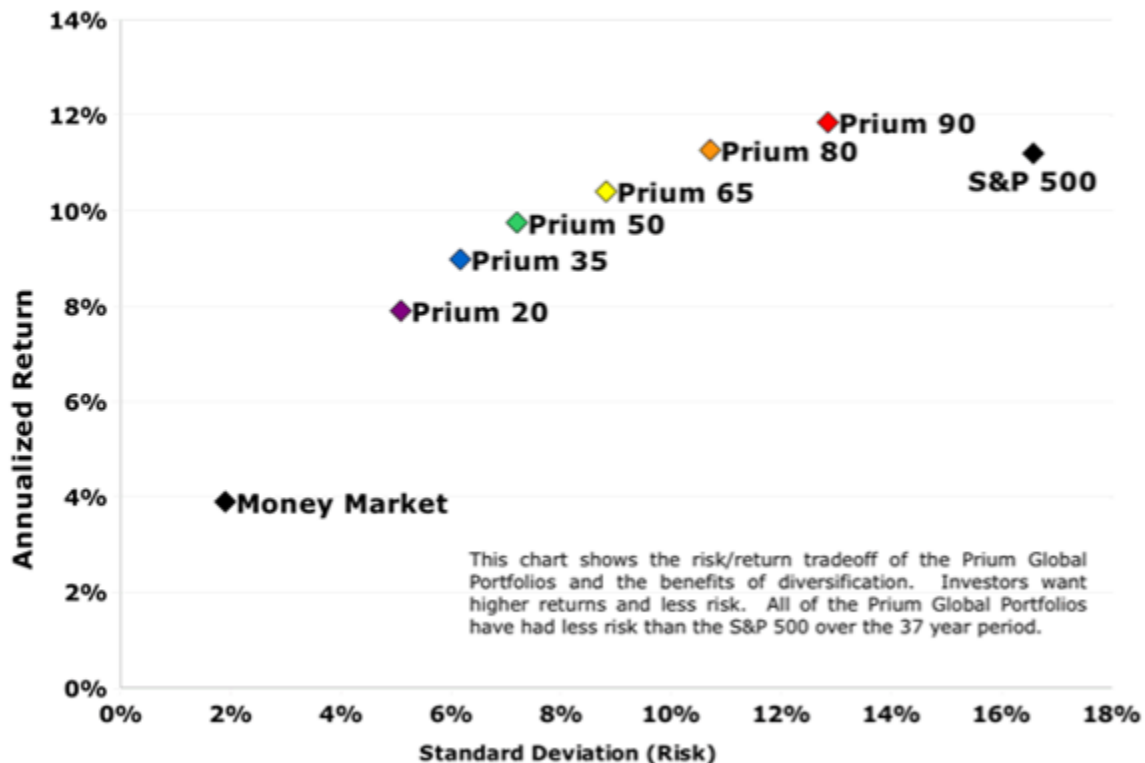
A Dedicated RIA

Prium Investment is an advisor, not a broker, and it wants to make sure you note this difference. As an [RIA \(Registered Investment Advisor\)](#), it wants to be your primary fiduciary, working to serve your best interest above all else. This Nashville-area wealth management firm also offers clients a transparent, fee-only schedule.

Six Global Portfolios

Doing business on a global scale is a smart way to broaden your access beyond traditional markets. Prium offers a premium global experience. In order to reach the needs of all of its clients, it has created six different [Prium Global Portfolios](#), each one tailored around the level of risk tolerated by the client. Portfolios are globally diversified and include a variety of asset classes in order to mitigate the negative effects of too much risk exposure.

Prium Global Portfolios 1970-2007



Source: [Prium](#)

Prium Investment Philosophy

Through the application of global, diversified asset class investing, Prium offers increased success between risk and return. The firm's tailored [investment philosophy](#) aids it in this process and is as follows:

- Managers do not beat the market: Over time, the market always wins, so this wealth management firm in the Nashville area doesn't waste time trying to "beat the market" as many managers do.
- Invest to capture market returns: Prium believes in holding investments that track the index in order to capture returns.
- Globally diversify: Predicting markets is extremely difficult. For this reason, Prium believes in globally diversified portfolios which include EFTs.
- Invest in many different asset classes: This "asset-class investing" reduces the overall risk in a portfolio.

- Reduce cost and risk: Through a broad mix of asset classes, long-term results are amplified, minimizing cost and risk association.
- Build portfolios for the long term: Each asset class comes with its own built-in risk and return characteristics. These classes are carefully combined to achieve long-term results and higher-than-expected returns.

Reliant Investment Management, LLC Review

With offices in Memphis, Tennessee and Shreveport, Louisiana, [Reliant Investment Management, LLC](#) offers portfolio management and advisory services to both individual and institutional clients. This Memphis wealth management firm currently manages over [\\$850 million](#) for roughly 125 clients.

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

Below, please find a list of key factors that allowed Reliant Investment Management, LLC to rank as one of this year's top wealth management firms Memphis.

Experienced Team

The team at Reliant Investments boasts [over 125 years of combined experience](#) in conservative yet expert portfolio management. Principals of this Memphis wealth management firm hold several community affiliations as well, whether it pertains to public speaking or holding seats on a variety of committees.

Independently Owned

Reliant Investments is not only owned and managed by its founding principals, but it remains unaffiliated with any other brokerage firms or financial institutions. Furthermore, Reliant Investments is an SEC-regulated

RIA (Registered Investment Advisor). It prides itself on providing commission-free services on a fee-only basis.

Discretionary Portfolio Management

Reliant Investments chooses to focus its efforts on core asset classes which utilize individual securities and tried-and-true investment strategies to yield high-performing returns. Let's take a look at some of this Memphis wealth management firm's [fixed income and equity strategies](#):

- High-quality, tax-exempt fixed income
- Large and mid-cap core equity
- Cash and liquidity management
- Custom equity strategies
- High-quality taxable fixed income
- Balanced allocations

Services for Clients

Reliant Investments offers specific services for public, institutional, and private clients. Each one comes with a set of custom-tailored management and investment strategies which have proven to be the best for that particular situation. The categories of services provided by this Memphis financial advisory firm are:

- Discretionary Portfolio Management
- Administrative Services
- Portfolio Consulting Services
- Retirement Plan Advisory Services
- Transitional Portfolio Management

The types of clients that are included in these different categories of public, institutional, and private are as follows.

Public Clients

- Development authorities
- Local municipal governments
- Special districts
- Housing authorities
- Development authorities
- School districts
- County/parish governments

- Transit authorities

Institutional Clients

- Educational institutions
- Health care entities
- Corporations
- Trusts, foundations, and endowments
- Banks and depositories
- Non-profit and religious entities

Private Clients

- Investment consultants
- Individual and family clients
- Trusts/estates/foundations
- Retirement assets and retirement plans
- Other financial advisors
- Donor-advised funds

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

Silverleaf Capital Partners, LLC Review

[Silverleaf Capital Partners, LLC](#) is a Memphis-based boutique investment management and financial planning firm. It is an RIA (Registered Investment Advisor) and stands firmly behind its fiduciary duty to clients.

With a low client-to-advisor ratio, it is able to offer dedicated personal services, with over [60 years](#) of expert industry experience.

Silverleaf is a [fee-only](#) wealth management firm in Memphis.

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

The following is a list of the key factors that allowed Silverleaf Capital Partners, LLC to rank as one of this year's top wealth management firms in Memphis.

Superior Investment Management

The balance between market volatility and risk is a delicate one. The team at Silverleaf Capital knows this very well.

As economic downturns, recessionary trends, and other negative market conditions begin to threaten the prosperity of its clients, this team of Memphis financial advisors watches carefully, ready to liquidate assets and make important investment decisions in order to safeguard its client's assets. Silverleaf believes this sets it apart from most other firms.

Family Office Approach

Silverleaf Capital has created a partnership with Fidelity Family Office Services. This partnership allows the firm to offer comprehensive financial planning services and access to this Memphis wealth management firm's infrastructure, giving clients total control and visibility of their wealth.

Additionally, Silverleaf is experienced in the integration and coordination of a family's widely deployed assets and will work with your financial custodians (CPAs, attorneys, and brokers) to consolidate your holdings and information for optimal performance.

A Strategic Lifestyle Plan

Silverleaf Capital offers a unique lifestyle planning service which is designed to preserve your wealth over the long term and pays special attention to the complexity of your assets both now and in the future. Just as the name implies, strategic lifestyle planning is meant to last throughout your lifetime and accounts for unavoidable environmental effects. These may include economic changes, taxation, and variable regulations and investment climates.

The Benefit Plan Consultation

If you are a retirement plan sponsor, Silverleaf Capital offers highly expert solutions. This Memphis wealth management firm offers consulting on all levels of creating and carrying out the role of a benefit plan. Its goal is to structure a benefit plan which remains simple, transparent, and full of good

value. It does so through continuous monitoring and strategic partnerships with plan sponsors.

Summit Asset Management Review

[Summit Asset Management](#) is an investment management and financial planning firm with [25 years](#) of unparalleled service at its Memphis, Tennessee office. It serves individuals, families, trusts, retirement plans, and charitable endowments.

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

Below, you will find a listing of each key factor that allowed Summit Asset Management to rank as one of this year's top wealth management firms in Memphis.

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

Clients at the Forefront

Summit Asset is a mid-sized, fee-only, independent firm. It is [100% employee-owned](#) and, as such, this wealth management firm in Memphis faces no pressures from outside entities to sell products or offer advice solely based on garnering a commission from the sale. The sole driving factor during all stages of planning and implementation is the success of the client.

Expert Insight

Summit Asset offers [regular market commentary](#) that is both insightful and innovative. Published regularly on its website, anyone interested in market events can take advantage of the information curated by Summit Asset's team of experts.

Investment Management at a Glance

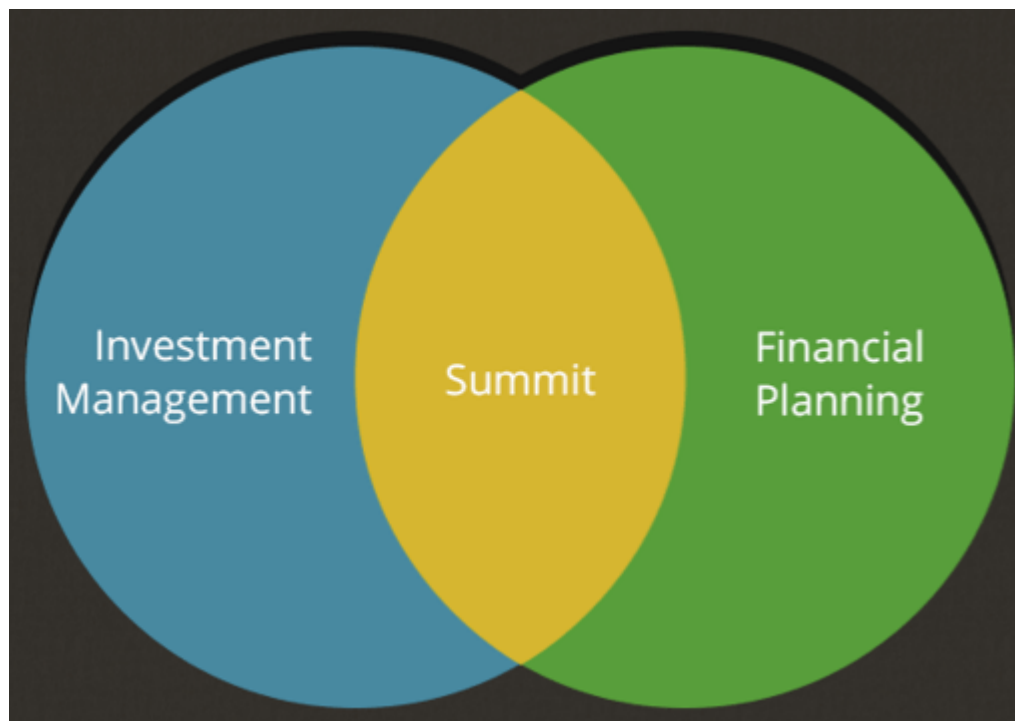
Investment portfolios are created based on a client's current financial situation and their future goals. Summit Asset then utilizes a team-driven

approach with an investment committee dedicated to complete oversight and adherence to company disciplines. After a completed portfolio is set into action, the investment committee monitors performance continuously and advises on changes when necessary. Each portfolio takes the [following factors](#) into account:

- Time horizons
- Taxes
- Risk tolerances
- Income
- Life goals

Furthermore, the following is a look at Summit's most often utilized asset classes:

- Individual securities (stocks, bonds, and CDs)
- Mutual funds
- Alternative hedge funds
- Private partnership options
- Exchange-traded funds (EFTs)



Comprehensive Financial Planning

Creating a client-specific financial plan takes a lot of insight and dedication on the part of your financial advisor. Through a team-centered approach, these Memphis financial advisors work together with the client to create a long-term plan for the family, business or non-profit sector. Typical [areas of planning](#) include:

- Education
- Insurance
- Retirement
- Family partnerships
- Business succession
- Tax issues
- Estate and trust
- Charitable giving

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

Waddell & Associates, LLC Review

[Waddell & Associates, LLC](#) (W&A) is a firm with offices located in both Memphis and Nashville, Tennessee. Through these offices, it offers complete investment management and financial planning services to both institutional and individual clients.

As an RIA (Registered Investment Advisor), it is bound by its fiduciary duty to always put the best interests of its clients first. It is an independent firm and remains conflict-free in its everyday business.

Waddell & Associates does not explicitly call itself fee-only or fee based, but they do provide some details on [how they are compensated](#) on their website. Most notably, they say that they do not accept commissions or make money on transaction activity. We advise all readers to confirm any firm's compensation structure before starting a working relationship.

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

The following is a listing of key factors that allowed Waddell & Associates, LLC to rank as one of this year's top wealth management firms in Nashville and Memphis.

Strong Core Values

W&A adheres to a set of self-regulated core values that propel it to offer the best service to its clients. As listed on its website, here are this Tennessee firm's [core values](#):

- It cares for its clients and associates like family.
- It requires ethics, intelligence, and competence in its associates.
- It holds itself accountable by practicing the planning and investment advice it recommends to clients.
- It places equal emphasis on financial planning, investment management, and communication.
- It contributes its time, talent, and capital to improve the quality of life in its communities.

The Investment Compass

This wealth management firm in Tennessee refers to its investment philosophy as its "compass". These core principles ensure that they always stay on course. While it provides guidance during difficult times, this compass is also helpful during stable times because it makes sure the firm does not slowly drift in a bad direction.

This financial advisory firm in Memphis and Nashville has stayed true to the following [investment compass principles](#) for over twenty years:

- Simplicity
- Owning what its clients own
- Prioritizing liquidity
- Seeking transparency
- Balancing asset management with risk management

Intellectual Capital

The wealth strategists at W&A work continuously and tirelessly to remain at the top of their industry. The following is just a sampling of acknowledgements and certifications the team has earned:

- CPA (Certified Public Accountant)

- CFP (Certified Financial Planner)
- CFA (Chartered Financial Analyst)
- CDFA (Certified Divorce Financial Analyst)
- PFS (Personal Financial Specialist)

Dedicated Client Services

In order to offer a comprehensive suite of services to both individual and institutional-grade clients, W&A offers flexibility within the [following services](#):

- Estate planning
- Asset management
- Executive benefit planning
- Charitable planning
- Retirement planning
- Concentrated stock positioning
- Education planning
- Tax strategy planning
- Insurance analysis
- Business succession planning
- Employee benefit planning

Additionally, W&A utilizes the following [investment vehicles](#) to diversify and safeguard each client's investment portfolio:

- Individual securities
- No-load mutual funds
- Municipal bonds
- Exchange-traded funds (ETFs)
- Money market funds and CDs
- Corporate bonds
- US treasury bonds

Woodmont Investment Counsel, LLC Review

By its own words, [Woodmont Investment Counsel, LLC](#) is a complete investment solution provider located right in Nashville, Tennessee. It serves

high-net-worth individuals, families, institutions, endowments, foundations, and trusts.

Founded in [2000](#), Woodmont Investment is an independent, fee-based RIA (Registered Investment Advisor) and has built upon its success year after year. This Nashville wealth management firm also offers highly regarded referrals to outside professionals in order to provide clients with a holistic solution for every need.

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

The following is a listing of key factors that allowed Woodmont Investment Counsel, LLC to rank as one of this year's top wealth management firms in Nashville.

An Experienced Investment Team

Woodmont Investment prides itself on having a diverse team with a multitude of qualifications and real-world experience. The team's backgrounds vary from those in the investment management industry, hedge fund expertise, and self-side investment banking to global fixed-income investment management, Wall Street brokerage firms, and various asset management firms. As you can see, the breadth of experience within this wealth management firm in Nashville is large, and this is a certain benefit to all types of clients.

Tailored Approach to Client Services

The first step in any plan is getting to know the unique needs of the client and assessing their current financial situation. Next, the firm presents the client with a specific investment strategy and asset allocation plan.

Each portfolio usually consists of a unique blend of equities, fixed-income, and, when called for, alternative investments. Portfolios are monitored regularly, and clients always remain well-informed about the activity of their investments. Clients of this wealth management firm in Nashville can rely on:

- Holistic Wealth Management
- Sophisticated Investment Management
- Consulting and Advisory Services

This wealth management firm in Nashville serves individuals, families, business owners, and institutions.

Investment Case Studies

This Nashville wealth management firm offers case studies to give prospective clients an idea of what they can expect from the financial planning and wealth management experience. This firm's inclusion of case studies is a huge plus, especially because they provide several for the different kinds of scenarios and clients that they deal with. You can find several case studies in the following categories:

- [Individuals](#)
- [Business Owners](#)
- [Families](#)
- [Institutions](#)

Related: [Top Financial Advisors in Ohio | Ranking | Ohio Wealth Management Firms](#)

Conclusion – Top 10 Financial Advisors in Nashville and Memphis, Tennessee

Protecting your wealth requires the same kind of diligence and care it took to accumulate it. Taking the time to look up financial advisors in Memphis and Tennessee is a small investment today that can pay huge dividends in the future.

Our reviews are meant to serve as a starting point so that you do not have to spend hours skimming search engine results. By cross-referencing the information in this review with the list of features you're looking for in a wealth management firm in Memphis or Nashville, you'll be well on your way to finding the perfect financial advisor in no time.

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