

Top 11 Best Financial Advisors in Toronto, Canada

2016 RANKING OF TOP WEALTH ADVISORS TOP FINANCIAL ADVISORS IN TORONTO

Finding the Top Wealth Advisors in Toronto, Canada

Finding a financial advisor in Toronto, Canada, is easy, but finding the *right* Toronto wealth advisor for you and your family is a much harder task. The sheer quantity of financial advisors and wealth management firms in Toronto increases the challenges that Canadian consumers face when selecting one.

However, by developing a clear awareness of the services you are looking for and doing proper research, the answers to the following questions will soon become clear:

- Who are the best financial advisors in Toronto, Canada?
- Where should I go if I am looking for additional services, like investment management, estate planning, and tax reduction?
- What types of fees do financial advisors in Toronto, CA, charge?
- Which financial advisor is best for me?

While the final decision rests in your hands, AdvisoryHQ's research and writing team has assembled a list of the top financial advisors in Toronto, Canada to give you a leg up on your way to financial success.



AdvisoryHQ's List of the Best Wealth Advisors in Toronto

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

- **Caring for Clients**
- **De Thomas Financial Group**
- **Frontwater Capital**
- **GlobeInvest Capital Management**
- **HighView Financial Group**
- **Leon Frazer and Associates**
- **Newport Private Wealth**
- **Olympian Financial, Inc.**
- **PWL Wealth Management, Inc.**
- **Tacita Capital, Inc.**
- **TriDelta Financial**

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Top 11 Financial Advisors in Toronto, Canada

Firm	Location
Caring for Clients	Toronto
De Thomas Financial Corp.	Toronto/Thornhill
Frontwater Capital	Toronto
Globeinvest Capital Management, Inc.	Toronto
HighView Financial Group	Oakville/Toronto
Leon Frazer & Associates	Toronto
Newport Private Wealth, Inc.	Toronto
Olympian Financial Inc.	Toronto
PWL Wealth Management, Inc.	Toronto
Tacita Capital Inc.	Toronto
TriDelta Financial	Oakville/Toronto

Methodology for Selecting Financial Advisors in Toronto

What methodology did we use in selecting this list of best financial advisors in Toronto?

Using publicly available sources, AdvisoryHQ identified a wide range of wealth management firms that provide services in Toronto and the surrounding areas.

We then applied AdvisoryHQ's "Breakthrough Selection Methodology" to identify the final list of top advisory firms that provide services to communities in and around Toronto.

Click here for a detailed review of our methodology: [AdvisoryHQ's Ranking Methodology for Canadian Financial Advisors](#).

Detailed Review – Top Ranking Financial Advisors in Toronto, Canada

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

Caring for Clients Review

[Caring for Clients](#) is a wealth management firm in Toronto that has served the area for 15 years. This firm prides itself on taking an integrative approach to financial planning and won't limit advice to quick points about investing. Instead, Caring for Clients looks at the whole picture and helps you structure your finances from top to bottom.

Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Caring for Clients to rank as one of 2016's top financial advisors in Toronto, Canada.

Female Leaders in Business:

Rona Birenbaum [founded](#) Caring for Clients in 2000 with the intent to provide a full spectrum of wealth management services.

The majority of Rona's [team](#) at Caring for Clients are women. If you are looking for a firm that offers advice through a female-focused lens, this firm may be a perfect match for you.

However, it doesn't limit its reach to female clients. Caring for Clients can assist anyone with financial matters such as:

- Pre-retirement
- Sale of a business
- Corporate issues
- Downsizing
- Newlyweds
- Aging parents and their children
- Recent windfalls

Earning Your Trust:

Caring for Clients won't rush the process. It works to get to know you and your family personally before making any financial suggestions or setting up your financial plan. On average, it needs about 2-4 weeks to develop the first draft of your financial plan and about six months for full implementation.

It strives to offer long-term financial planning services and to ensure that your financial needs are attended to through any difficult or unexpected life changes. Services won't stop with the financial plan; part of Caring for Clients' approach is to see you through crises or surprises.

Services:

Caring for Clients is more than just an investment advisory firm and can assist you with all of your financial planning needs. It offers the following services:

- Retirement planning
- Estate planning & administration
- Cash flow management
- Debt management
- Tax planning
- Investment management
- Ongoing review and monitoring
- Corporate care services

Fee Transparency:

In line with its theme of working to earn your trust, Caring for Clients offers complete transparency in fees.

It operates as a fee-only, independent firm, meaning it never earns commissions for offering you certain products and is not bound to a particular financial institution.

Caring for Clients openly published its revenue allocations in a [blog post](#) on its site. Here's the breakdown:

- Compliance and back office: 15%
- Salaries: 40%
- Training and development: 5%
- Marketing: 1%
- Technology and client service: 10%
- Office rent: 4%
- Retained earnings: 25%

With this level of transparency and honesty, you can be confident that you are working with a firm that truly cares for its clients.

De Thomas Financial Corp Review

Founded in 1987, [De Thomas Financial Corp](#) has grown into an extremely successful wealth advisory firm with nine locations. It offers [seven experienced financial planners](#) in Toronto ready to assist you with building a successful investment portfolio.

With over [\\$1 billion in assets under management](#) and operating as in an independent wealth advisory firm, De Thomas has the experience and expertise necessary to lead you to financial success.

Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled De Thomas Financial Corp to be rated as one of 2016's top financial firms in Toronto, Canada.

Sincere and Realistic Service:

The folks at De Thomas Financial Corp readily admit that they don't *know* the future of the markets. They take a realistic approach, using [strategies](#) of respected academics and Nobel Prize winners to create a personalized financial plan for you based on elements that can be controlled and predicted.

Investment Process:

The investment strategy at De Thomas Financial is made up of [three main tenants](#).

- Diversification
- Asset allocation
- Minimizing fees

First, it focuses on diversification of investments. It will create a portfolio that includes a broad range of both bond and security investments. This ensures that you won't become a victim of a volatile market.

Next, it focuses on expert asset allocation. Each investment made on your behalf is well thought out, includes a long-term target, and is recalibrated if necessary.

Last, it works to minimize your fees. De Thomas uses cost-efficient products that help save you money and minimize spending extra money on taxes as well.

Independent Advice:

De Thomas is an independent advisory firm without ties to larger banks or financial institutions.

De Thomas Private Wealth Advisory Services:

It also offers specialty services for high-net-worth clients. Investors with portfolios of [\\$5 million or more](#) are eligible for services from De Thomas Private Wealth. This division offers wealthy investors the following benefits:

- Experience

- Personal approach
- Lower fees
- Safety
- Disciplined investment process
- Fully integrated solutions

Investment and wealth planning services are tailored to high-net-worth clients and are not limited to investment advice. Services are holistic and handled by a team of experienced advisors who get to know you personally and understand the factors at play for wealthy investors.

Further, your funds are protected by a third party, B2B Bank, which shields your funds from De Thomas creditors in the event of insolvency.

Frontwater Capital Review

The financial crisis of 2008 inspired Jeff Kaminker to form [Frontwater Capital](#) as an independent advisory firm focusing on investments related to pension plans, financial institutions, and large corporations. It is a boutique investment advisor in Toronto that works with high-net-worth families on a client-referral basis only.

Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Frontwater Capital to rank as one of 2016's top financial advisors in Toronto, Canada.

Option-Licensed Portfolio Managers:

Frontwater's expert knowledge of stock-option investing and risk management makes this firm stand out from the rest.

It believes that traditional, "long-only" asset allocation investments used by most financial firms do not sufficiently protect investors from risk. Frontwater utilizes stock option investments to further protect investors and to maximize returns.

This strategy enables Frontwater-managed portfolios to outperform others and to protect its clients from market volatility. It states that option-based investing allows the firm to:

- Establish attractive entry points on a particular stock
- Lower average costs
- Institute opportunistic profit-taking
- Insure portfolios from potential market disaster

Fee-Only Independent Firm:

Frontwater charges on a fee-only basis, which means it never accepts commissions from third parties when handling your portfolio. The only fees it accepts will be yours; therefore, your success is Frontwater's top priority. It is also an independent firm, so Frontwater is not tied to any bank or large financial institution.

Independent Research:

Frontwater **conducts** independent research on the market before suggesting financial moves. This allows the firm to make decisions grounded on:

- Sound financial analysis
- Reliable fundamental data
- Quantitative stock selection techniques

This strategy allows Frontwater to use investment techniques, which are normally only accessible to large companies, and apply them to the portfolios of individual investors.

GlobeInvest Capital Management Review

Advisors at **GlobeInvest** bring 100 years of combined financial advisory experience to the table, so your finances are in good hands at this firm. It opened in 1988 and believes that an advisory firm should strive to offer personalized service to build and grow your portfolio. As independent wealth managers in Toronto, it strives to provide unbiased advice with your needs as its top priority.

Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled GlobeInvest Capital Management to rank as one of 2016's top investment advisors in Toronto, Canada.

Client Communication:

GlobeInvest advisors meet with you without obligation to learn about your individual needs and investment goals. It also prepares your customized portfolio and presents it to you without any cost or obligation. Clients get a quarterly portfolio update and achievement statement as well as monthly reports. The firm has an open-door policy and makes itself available for in-person progress meetings.

If unexpected changes ever occur with your finances, GlobeInvest is available to re-evaluate your portfolio based on your new needs and expectations.

Wealth Management Services:

GlobeInvest uses a layered wealth management system, including:

- Financial planning
- Tax planning
- Estate planning
- Investment management

Clients may receive investment planning services at GlobeInvest. Any of the other planning services are referred to EES Financial services, a fee-only Canadian advisory firm.

Long-Term Investment Approach:

Advisors at GlobeInvest apply investment strategies that prioritize long-term returns. They invest in international, premier companies as well as other securities including:

- Bonds
- Preferred shares
- Income trusts
- Dividend paying equities

Independent Firm:

GlobeInvest functions as an independent firm, so your needs are not influenced by third parties or products from a larger financial institution.

Complete Fee Transparency

Fees are completely transparent at GlobeInvest. It charges a percentage of assets under management, and clients also pay a tax-deductible fee to an independent custodian responsible for holding assets.

In fact, GlobeInvest [publishes](#) its fee rates plainly on its website. Furthermore, you will never pay any referral sales fees because it won't invest your money in a mutual or pooled fund.

HighView Financial Group Review

[HighView Financial Group](#) is a wealth management firm in Toronto founded by Gary Brent and Mark Barnicutt in November of 2005. HighView Financial has elected to offer services as a fiduciary and, thus, is legally bound by the highest standard of care, requiring it to only provide services that are in the client's best interest. It focuses on providing independent advice to affluent families and foundations or endowments.

Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled HighView Financial to rank as one of 2016's top financial advisors in Toronto, Canada.

Your Outsourced CIO:

As a fiduciary, HighView is bound by a stringent legal standard which allows it to act as more than merely an investment advisory firm but also as your outsourced chief investment officer. As your CIO, HighView takes on the following roles:

- Assuming an investment stewardship role
- Conducting a client goals assessment

- Managing your assets
- Selecting and monitoring the best team of professionals

Outsourced Chief Investment Officer Process:

- **Investment Stewardship:** HighView works with no conflicts of interest and considers only your needs. It also manages your existing collaborative professional team, including lawyers and accountants, to further safeguard your assets.
- **Goals Assessment:** HighView strives to know you personally before setting financial goals and building your portfolio. It seeks to fully understand your investment goals, expected deadlines, and level of risk tolerance. It understands that each investor has a different set of expectations and goals and will never force you into a cookie-cutter investment portfolio.
- **Asset Management:** Based on your goals assessment, HighView builds an investment strategy designed strictly for you. A team of professionals will keep a close eye on your portfolio and will make any necessary changes depending on your needs and the current financial climate, ensuring compliance with your originally stated goals and investment mission.

Working with Affluent Families:

HighView specializes in services targeting the needs of affluent families. Services cover lifestyle management, retirement planning, funding education, and transfer of wealth. When providing family advisory services, HighView applies the following values:

- Collaborative decision-making
- Consistent portfolio reviews
- Open-door policy
- Fiduciary advisory services
- Financial education for you and your family

Operating with these values means that HighView will always put you first and will never leave you out of the decision-making process. An open-door policy indicates that this firm will care for you individually by taking the time to answer your questions and addressing your particular needs.

It also offers vital education about the complicated financial system and investment process, making the investment and planning experience much smoother for you and your family.

Working with Foundations:

If your foundation is looking to outsource fiscal oversight, HighView can serve as your chief investment officer.

Serving as a fiduciary, it will be legally bound to serve in the best interest of the foundation.

For foundations that are unable to establish in-house fiscal management, HighView has the experience and skill to accomplish all of your investment and fiscal needs.

Leon Frazer and Associates Review

With three locations and over **\$1.6 billion** in assets under management, **Leon Frazer and Associates** is one of Toronto's premier wealth advisory firms. Its management **team of 20** boasts experience in advising private wealth portfolios, retail clients, and institutional investment clients.

Leon Frazer and Associates has operated for **over 75 years** and is one of Canada's first financial advisory firms. Since its founding in 1939, it has earned the status as a standout advisory firm in the country and specifically in the area of dividend investing.

Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisory Companies

Below are key factors that enabled Leon Frazer and Associates to be rated as one of 2016's top financial firms in Toronto, Canada.

Firm History:

A World War I veteran, Leon Frazer opened Leon Frazer and Associates in **1939** as the first investment advisory firm in Ontario and second in Canada. In 1947, George Frazer began working with his father as one of the first salaried employees. When Leon passed in 1964, George and Bill Tynkaluk took over as managing partners.

In 1952, George was a founding member of the Investment Counsel Association of Canada, an institution that became the Portfolio Management Association of Canada, which organizes 160 investment firms managing at least \$750 billion in assets.

George later accepted a Career Achievement Award from the Canadian Investment Awards, honouring six decades of spectacular work.

Investment Process:

Leon Frazer and Associates believes that investments should be **long-term** decisions. It believes any investment should be held for at least **five years**. This protects clients from unpredictable markets and maximizes the dividend return. The main tenets of Leon Frazer's investment strategy are:

- Preservation of capital
- Maintaining buying power against inflation
- Long-term capital appreciation
- Time in the market versus marketing timing

Working for You:

The team meets weekly to compare the economic climate with current client portfolios to ensure that long-term investments are thriving. Typical investments include:

- Pipelines
- Utilities
- Telecoms
- Financial services

Leon Frazer believes these industries are timeless and are, therefore, best suited for long-term investing. The firm only invests in stable, reputable companies that Leon Frazer considers the “**backbone**” of the economy. To determine which companies to invest with, Leon Frazer applies the following factors:

- Five-year growth record regarding cash flow, earnings, and dividends
- Annual growth record regarding cash flow, earnings, and dividends
- Current yield
- Company earning variability
- Stock liquidity level

Knowing that the firm is using this level of consideration in choosing investments will give you confidence that it is offering sound financial advice that will help benefit your bottom line.

Advisory Services:

Leon Frazer offers three areas of investment advice and planning:

- Private wealth
- Institutional investment
- Retail investment

All investment areas utilize Leon Frazer's philosophy of long-term investing. The firm firmly believes that long-term investing is the best strategy to prevent loss and to maximize return in an unpredictable market.

Newport Private Wealth, Inc. Review

Newport Private Wealth is a Toronto-based wealth management firm that prides itself on superior customer service. You can expect that a portfolio manager will always be available to speak with you personally to discuss your ongoing financial needs.

As a fee-only firm, it only serves your interests and does not receive any commissions from third parties for its investment management services. Newport Private Wealth services cater to individuals with at least \$1 million in investable assets.

Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Newport Private Wealth to rank as one of 2016's top financial advisors in Toronto, Canada.

Commitment to You:

Newport Private Wealth goes above and beyond to offer the best customer service possible. Its service commitment is comprised of the following **values**:

- **Listen:** Newport seeks to know you personally before building your investment plan. It likes to have a full picture of your goals, expectations for wealth management, and of you personally, as well. It will work around your desired level of communication and keep in touch according to your needs.
- **Verify:** Prior to building your investment portfolio, Newport will create an investment policy statement designed especially for you. This statement will outline the proposed plan for your money, including factors such as risk tolerance, timelines, and income/liquidity needs. Once you are comfortable with the proposed investment policy statement, Newport will implement the strategy
- **Communicate:** Newport will take every opportunity to communicate with you regarding your portfolio and the current economic climate. You won't have to decipher emails filled with jargon and economic terms: it will communicate using plain and simple language that you'll understand. You can expect prompt responses to calls and emails, monthly account statements from an independent custodian, and regular meetings with investment professionals.
- **Adaptation:** In the event of an unexpected change in circumstances, Newport will be there to assist you through it and help you overcome any challenges.
- **Innovation:** Newport uses out-of-the-box thinking when creating your financial plan. You can expect solutions tailored to your situation and plans that will maximize your dollar.

Investment Management:

This firm offers services that will get you more from your existing wealth. It offers investment management services that will keep you at the standard of living you have grown to expect.

Newport offers services that are designed to provide steady income to allow you to fund your lifestyle; provide growth to protect your standard of living long-term and protect you from a significant or permanent loss of capital. To achieve these objectives, the firm has a unique investment process run by a professional Investment Committee that invests in 10 different asset categories through independent money managers.

This approach is designed to deliver steady returns and greater wealth long-term. The firm's professionals invest their own money alongside clients in the same investment vehicles, thus aligning your mutual interests.

Wealth Management:

Newport Private Wealth understands that increased wealth doesn't always make life easier. In fact, sometimes wealth complicates matters so that you need an experienced financial advisor to guide you through the process. Wealth management services offered include:

- Asset and income protection
- Charitable giving
- Corporate advisory
- Estate and succession planning
- Individual pension plans
- Retirement and financial planning
- Tax planning

Fee-Only Firm:

As a **fee-only** firm, Newport will only receive funds from you and does not accept third-party commissions for investment management services.

Olympian Financial, Inc. Review

Olympian Financial has been a wealth management firm in Toronto for over 20 years. Alexander Mitonidis and Danny Mitonides founded Olympian to provide independent advice with a strategic and methodical investment style.

Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Olympian Financial to rank as one of 2016's top financial advisors in Toronto, Canada.

Client-Centered Approach:

Advisors at Olympian Financial strive to put the client first. It's a team effort with experienced advisors, back office administrative staff, and the firm's founders to make sure you receive the service you deserve.

Independent Service:

Olympian Financial is an independent firm, so it won't offer you any proprietary products of its own or from any affiliated institution. This helps prevent unfair conflicts of interest.

Building Wealth:

You will never receive pre-packaged advice from a professional at Olympian. Advisors offer individualized plans that differ based on your goals and needs. Olympian uses two approaches to financial planning:

- Tactical wealth management
- Personalized wealth management

The tactical approach means that Olympian's investment strategies are more efficient and flexible than the traditional strategies employed by other firms. This gives Olympian Financial's clients an advantage in the financial marketplace.

Personalized wealth management means that your portfolio will never be pre-packaged. Cookie-cutter plans are not part of the process with this firm. Your individual needs will be met with a personalized plan put together by skilled and experienced advisors.

PWL Wealth Management, Inc. Review

Founded in 1996, [PWL Wealth Management](#) has grown to four locations across Canada. Its Toronto wealth managers are ready to offer top-notch, research-backed advice. Its firm mantra, "Adding Value, Reducing Risk," is what inspires advisors to build you the best investment portfolio possible. PWL never receives commissions or kickbacks from outside parties; its only fees come from you. This policy gives you comfort in knowing that your needs will be second to none.

Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled PWL Wealth Management, Inc. to rank as one of 2016's top financial advisors in Toronto, Canada.

Research-Based Investments:

You will be in good hands at PWL Wealth Management because its advisors ignore market fads and short-term trends. Instead, they focus only on research-backed strategies that offer proven results.

The firm's research department provides current, expert advice to advisors, which enables it to offer top quality suggestions for your portfolio. PWL Financial researchers use the [following approach](#):

- Asset class research
- Financial analysis of PWL's list of approved securities
- External research from qualified sources
- Monthly reports on financial markets

Adding Value and Decreasing Risk:

PWL applies the [mantra](#) "Adding Value, Reducing Risk" to all of its investment and wealth planning services. Those services include:

- Objective setting
- Retirement and estate planning
- Institutional-style portfolio management
- Taxes
- Income and asset protection

Building Your Personalized Portfolio:

PWL has a step-by-step process for learning about you and understanding your investment needs and goals.

- **Discovery Meeting:** PWL first sets up an informative meeting to learn about you. It looks at the current state of your financials, identifies your goals, and begins to brainstorm with you about how you'll achieve your goals.
- **Proposal Meeting:** At your next meeting, a PWL advisor will have evaluated your situation and will present a draft plan for moving forward.
- **Commitment Meeting:** After the proposal meeting, you will meet again to discuss a commitment for moving forward. If you decide that PWL's

proposal is the right plan for you, you will also sign appropriate documents to solidify the relationship and begin your relationship with PWL.

- **Progress Meetings:** PWL keeps you updated with the status of your accounts at these meetings. It's also an open forum for you to ask any lingering questions about your portfolio.
- **Review Meetings:** These meetings keep both you and PWL updated on the status of your accounts and financials. You'll have the opportunity to share any changes to your finances in the event that PWL should make modifications to your investment plan. You'll also be de-briefed on the progress of your investments and how your goals are being achieved.

Tacita Capital Review

Tacita Capital is a family-based and family-owned firm specializing in “ultra-affluent” family investors. It realizes that a large amount of capital creates complicated investment, savings, and tax issues, and it has the specialized skills to see you through it. As an independent, fee-only firm, Tacita is a great firm uniquely suited to assist extremely wealthy families.

Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Tacita Capital to rank as one of 2016's top financial advisors in Toronto, Canada.

Family Focus:

Tacita Capital only works with wealthy families. It doesn't work with institutions or businesses, so if you are looking for a firm with a family approach, Tacita may be a great match for you.

Firm History:

Founded in 2005 by Michael Nairne and Joanne Swystun, Tacita Capital was created with the intent to bring premier investment services to affluent Canadian families.

Michael Nairne brings decades of experience to the table. In 1995, he helped found Assante Corporation, one of the largest wealth advisory firms in Canada. Assante was sold prior to the opening of Tacita Capital.

Joanne Swystun was a practicing tax lawyer for over 25 years and was often named as one of the top 500 lawyers in Canada by Lexpert/American Lawyer Guide.

Michael and Joanne have combined forces to establish a powerhouse wealth advisory firm for elite Canadian family investors.

Independent, Fee-Only Firm:

Tacita is not affiliated with any third-party institutions. There is no pressure to make a particular investment decision because of an ongoing relationship with a larger bank or firm. Tacita's investment advice is totally independent and made with only you in mind. It doesn't receive commissions or kickbacks for giving any one else your business.

Portfolio and Investment Approach:

Tacita's approach to building your portfolio is:

- Principled and evidence-based
- Advanced application of ultra-affluent investment practices
- Structured to your goals
- Tax-conscious

Core and Satellite Investment Structure

Tacita employs a “**Core and Satellite**” investment structure used by premier investors and affluent families. Tacita believes that traditional investment models are insufficient because they induce unnecessary advisor fees, lack a tax-return focus, and assume a high level of risk due to a lack of diversification.

Tacita believes its Core and Satellite investment style is a superior model because it prevents the above-stated inefficiencies.

The Core of your portfolio will comprise enhanced index and exchange-traded funds (ETFs) focusing on liquid portions of equity markets. Also included are

value and high-quality stocks which have proven to result in higher returns for investors. The Core investments strategy prioritizes long-term returns rather than short-term.

Satellite aspects supply a second layer of investments to your portfolio that enhances your overall return. This second layer affords benefits that include:

- Diversification
- Higher overall return
- Access to tax deferrals

TriDelta Financial Review

TriDelta Financial is a Toronto- and Oakville-based advisory firm with a solid team of advisors offering a range of comprehensive services. It houses over one dozen advisors and partners with a variety of specialized consultants ready to assist you with any issue related to your finances. It seeks to function as a “family doctor” for your finances by offering specialized services that cater to your individualized needs.

Key Factors That Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled TriDelta Financial to rank as one of 2016’s top financial advisors in Toronto, Canada.

Comprehensive Approach:

TriDelta offers a full range of services, including:

- Investment planning
- Wealth management
- Insurance services
- Varieties of financial consultants available

At TriDelta, you can manage most of your financial needs. Aside from wealth planning and investment management, it also offers insurance services and a range of financial consultants as well.

For example, it works with contracted mortgage brokers in the event that a TriDelta client has a mortgage-related question. Offering you access to these consultants means that all of your financial needs can be handled at one office, making life more organized and less complex.

Savings:

TriDelta claims that it can offer you **more** for your money. It explains on its website that, while the average investment firm charges \$20,240 after tax for an \$800,000 investment portfolio, TriDelta will charge you \$9,200 after tax for the same size portfolio.

Your “Family Doctor”:

TriDelta advisors consider themselves your “**family doctor**” in that they apply specialized knowledge to your individualized concerns to help you achieve your stated goals.

If an advisor feels that one of the specialists TriDelta has partnered with has further knowledge of a particular issue related to your portfolio, that specialist will step in to make sure you receive the highest level of attention and skill available.

Conclusion – Top 11 Financial Advisors in Toronto, Canada

Everyone has different factors to consider when choosing a financial advisor. Some may want a firm that specializes in investment advice for ultra-affluent families, and others may require a firm that offers retirement or education planning services. However, everyone needs an advisor that can be trusted to perform sincere and fair service.

This list has outlined the differences and particular specialties of eleven wealth management firms in Toronto. Hopefully, this breakdown has helped you sort through which firm offers the specialty services that will work best for you and your family.

Most firms welcome potential clients for a prospective interview, so call them and do further research before deciding to partner with one. You should feel

totally confident that you've made the correct choice and that your financial planning and investments are in the right hands.

If you have questions, comments or tips about this “Top 11 Financial Advisors in Toronto” article, send us an **email**. Follow us on social media to be the first to hear about major economic news stories.

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Cheers,
AdvisoryHQ Team