

Top 8 Best Financial Advisors in Calgary, Alberta, CA | 2017 Ranking | Calgary Wealth Management Firms

2017 RANKING AND REVIEW TOP RANKING WEALTH ADVISORS IN CALGARY

How Do We Define the Best Wealth Advisors in Calgary?

The process to find a Calgary wealth manager or financial advisor in Calgary isn't one most people take lightly. A Calgary financial advisor has a set of responsibilities to their clients that include not just selecting investments for them, but also ensuring they always put their financial well-being at the forefront of their decisions.

A financial advisor firm in Calgary should be well-established and reputable, with a strong client base. They should also hold financial certifications, participate in continuing education programs to ensure they're aware of regulations and best practices, and they should be transparent in their actions.

Along with these criteria, we also take fee structure into consideration, and we weighted this factor heavily when creating the following ranking of the 2017 best financial advisors in Calgary.

We prefer to rank Calgary financial advisors who are fee-only. This means their advice is objective, and not related to an affiliation or compensation from a certain financial product or institution. With that being said, there are also fee-based Calgary financial advisors and wealth managers included on this list, but they were added with careful consideration to their other advantages for clients.

Also relevant in the ranking of the 2017 top 8 best financial advisors in Calgary was the size of the firm. We tend to prefer larger firms who are better

equipped to deal with complex financial needs and who take a collaborative, team approach to the work they do for clients.

Of course, these weren't the only factors considered, and each of the Calgary financial advisor firms included on this ranking excel in a variety of areas.



Award Emblem: Top 8 Best Financial Advisors in Calgary, Alberta

AdvisoryHQ's List of the Top 8 Best Wealth Advisors in Calgary, Alberta

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

- [Canaccord Genuity Corp](#)
- [Hemisphere Capital Management](#)
- [Integrated Wealth Management](#)
- [Networth Management](#)

- [Northland Wealth Management](#)
- [Perron & Partners Wealth Management](#)
- [Vega Estate Planning Corp](#)
- [WealthCo](#)

Top 8 Best Financial Advisors in Calgary, Alberta | Brief Comparison

Top 8 Calgary Financial Advisors	Client Focus	What Sets This Firm Apart
Canaccord Genuity	Individual, institutional and corporate clients	Established in 1950, making it one of the oldest independent Calgary wealth management firms
Hemisphere Capital Management	Affluent individuals, family trusts and foundations	Independent and employee-owned
Integrated Wealth Management	Individuals and organizations including entrepreneurs	Operates as a completely independent Fiduciary Portfolio Management firm
Networth Asset Management	Individuals, women, business owners	Privately held boutique financial services firm
Northland Wealth Management	Primarily affluent families	Doesn't receive incremental revenue as a result of advice or solutions
Perron & Partners Wealth Management	Business owners and farmers, multi-generational planning, professionals looking for long-term planning	No restrictions, directives or corporate incentives
Vega Estate Planning Corp.	Business owners	Focus is on identifying tax efficient strategies to access corporate profits
WealthCo	Individuals and families	Advice is built on the "Wealth Enhancer" four-step process

Table: Top 8 Best Calgary Financial Advisors | 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 8 Best Financial Advisors in Calgary, Alberta

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

See Also: [Best Financial Advisors in Toronto, Canada | Ranking | Toronto Wealth Management Firms](#)

Canaccord Genuity Corp Review

[Canaccord Genuity](#) is one of Calgary's top independent, full-service financial services providers, with two primary segments within the securities industry, which are wealth management and global capital markets. Canaccord Genuity was [established in 1950](#), and since that time has remained dedicated to the building of long-term client relationships. This Calgary financial advisor and wealth management firm also has offices in 10 countries around the world.

Key Factors That Enabled This Firm to Rank as a Top 2017 Financial Advisor Firm in Calgary

Below are key factors that enabled Canaccord Genuity Corp to rank as one of 2017's top financial advisors in Calgary, Alberta.

Company History

Canaccord was founded in 1950 as a venture capital firm called Hemsworth, Turton & Co. In 1968, now under the name Canarim Investment Corporation, they become the largest trader on the Vancouver Stock Exchange. As of 2005, the firm is named Canaccord Capital, [employs 1200 people](#), has become a full-service financial advisory firm, and is publicly traded on the Toronto and London Stock Exchanges.

By 2013, the firm has linked its international presence under the name Canaccord Genuity Corp. The firm's reach extends to Canada, Europe, Australia, and Asia.

Comprehensive Services

Canaccord offers a full range of financial services:

- Financial and estate planning
- Insurance services
- Charitable giving
- Tax
- Investment planning
- Retirement
- Pension plans
- Education planning

CC Wealth Assessment

The Canaccord website describes that before creating your financial plan and building your portfolio, a Canaccord advisor will first provide a "CC Wealth Assessment." This assessment is what the advisor uses to learn about your personal needs, goals, and limitations so that together you can build an individualized financial plan.

CC Wealth Strategy

After conducting a CC Wealth Assessment, their website writes that an advisor will determine which products and services are best suited for your needs. They will design an individualized investment and financial plan.

Investment Options

Fixed Income Securities

Canaccord's website [states](#) that you may potentially invest with federal, provincial, municipal, or corporate bonds. Other fixed securities include structured and floating rate loans, money markets, and guaranteed investment certificates.

Canaccord [writes](#) on their website that these can potentially make good investment choices because they are more predictable than equities and are often paid out first in the event of company insolvency.

Equities

Canaccord [explains](#) that shares of a publicly traded company can make wise investments because they often pay dividends and are easily bought and sold. An advisor will suggest equities based on your particular needs. Canaccord invests in areas including but not limited to:

- Metals and mining
- Energy
- Agriculture
- Technology
- Media and telecommunications
- Paper and forestry
- Infrastructure
- Healthcare
- Defense

Mutual Funds

Canaccord [writes](#) that mutual funds are liquid and diversified in nature and often offer low minimum investment options. Specifically, a mutual fund is a professionally run bundle of varied investments. The diversity of investments helps limit risk in a volatile market.

Investment Pools

An advisor at Canaccord may potentially suggest an [investment pool or structured product](#). These include a mix of equities and fixed income investments or other investments such as derivatives or hedging strategies.

Canaccord explains that these offer further diversification and personalization of your portfolio.

Public Venture Capital

Also offered are small business and new company investments. Canaccord [explains](#) that these can potentially offer higher growth potential, but this benefit also comes with a higher risk as these companies are less stable in the markets.

[Don't Miss: Top Financial Advisors in Montréal & Ottawa, Québec, Canada](#)

Hemisphere Capital Management Review

Founded by Jim Aronitz in 1993, [Hemisphere](#) has become a successful Calgary financial advisory firm with over [\\$300 million in assets under](#) management and over a dozen employees. As an independent financial planner in Calgary, Hemisphere advertises strong customer service in a personalized environment.



Key Factors That Enabled This Firm to Rank as a Top 2017 Calgary Wealth Advisory Firm

Below are key factors that enabled Hemisphere Capital Management to be rated as one of 2017's top financial firms in Calgary, Alberta.

Independent and Employee-Owned

As has been cited throughout this review, one of the most important factors and ranking criteria for Calgary financial advisors was whether or not they are independent.

Hemisphere is not only independent, but also employee-owned.

Hemisphere operates with a philosophy of trust and the approach all decisions and investments as if the clients' assets were their own.

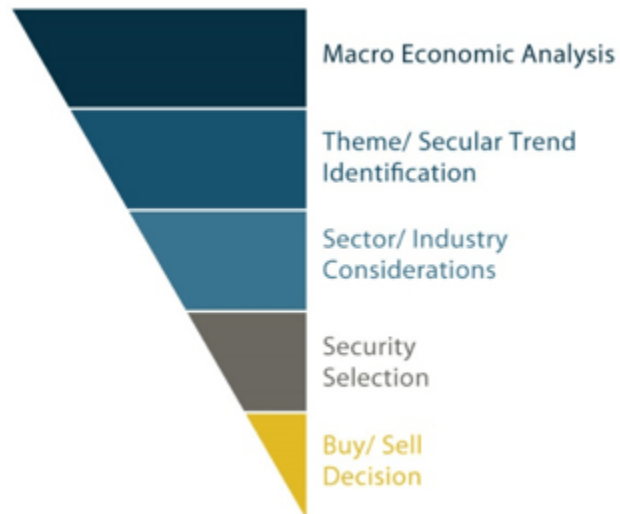
Five Stage Investment Approach

Hemisphere, one of the leading wealth management firms in Calgary, has a unique five-step investment process.

This includes:

- **Macro Factor Analysis:** This is the time where the team at this Calgary wealth management firm looks at broad issues impacting investors including global political, economic and social developments.
- **Theme Identification:** This step of the investment approach undertaken by this financial advisor in Calgary includes looking at investment themes and trends within the framework of macro events and developments. They look at how various trends might impact direct factors that influence investors such as interest rates, capital flows, yields between asset classes and more.
- **Sector/Industry Considerations:** Here the team of this financial management firm in Calgary looks at specific sectors of the economy or individual industries that have favorable outlooks, and they also identify options with what they call a more "challenging outlook.
- **Security Selection:** This involves analysis at the qualitative and quantitative level.

- **Buy/Sell Decision:** When the team of this financial advisor firm in Calgary estimates intrinsic value, they then create what they call a range of fair value. Then, stocks that are trading below their intrinsic value may fall into various categories.



Hemisphere believes this strategy optimizes returns. Their site [outlines](#) 5 sets of “undervalued” companies with which they would recommend you invest:

- **Fallen Angel:** A normally successful company that has had a downturn. This means they are trading at a lower level compared to their long-term potential.
- **Hidden Gem:** A company that hasn’t yet been noticed by mainstream investors but Hemisphere acknowledges its potential for long-term returns.
- **Net Asset Value Play:** Stock price is much lower than the company’s overall worth.
- **Industry Laggard:** A company that trades much lower than other competitors in its industry.
- **Special Situation:** Other companies or firms with unrecognized potential.

Private Portfolio Management

Hemisphere also offers [Private Portfolio Management](#) services to individuals, holding companies, and trusts and estates with [assets of more than \\$750,000](#).

Private Portfolio clients enjoy quarterly update meetings and customized investment portfolios, including:

- Government and corporate bonds
- Preferred shares
- Dividend-paying stocks
- Opportunistic stock positions

[Related: Best Financial Advisors in Vancouver, BC, Canada | Ranking | Vancouver Wealth Managers](#)

Integrated Wealth Management Review

This Calgary-based advisory firm takes a holistic approach to financial planning. [Integrated Wealth](#) sees financial planning as a piece of the puzzle in the larger picture of your life. They strive to get to know you personally so that they can link your financial habits and actions with your goals and dreams.

They also believe that once you have your finances in order, you'll be able to shed unnecessary anxiety and fears about the future and more fully enjoy your life. This devotion to your happiness is exemplified in Integrated Wealth's promise to limit services to [100 families maximum](#).

Key Factors That Enabled This Firm to Rank as a Top 2017 Wealth Advisory Company in Calgary

Below are key factors that enabled Integrated Wealth Management to rank as one of 2017's top financial advisors in Calgary, Alberta.

Mindful Wealth Management

Integrated Wealth understands that your finances are not the avenue to happiness, but merely part of a larger picture so that you can enjoy life to its fullest. Integrated works with your finances so that you can focus on what really matters—purpose, happiness, and family.

Their site states that advisors will learn about your overall life goals and tailor your financial plan to achieve your desired outcome. Integrated Wealth works

with outside experts, like lawyers and CPAs, to offer a holistic, stress-free approach to wealth management.

Integrated Wealth Management Planning Approach

Integrated Wealth describes their step-by-step [planning process](#) with clients:

Discovery Process

In this meeting, you'll sit down with an advisor to see if your financial goals can be fulfilled by services offered at Integrated Wealth. Your advisor will evaluate your overall "Life Goals" and begin to understand your lifestyle, personality, and values.

Information Gathering

Next, an advisor will dive into the state of your financials. They will review:

- Net worth
- Household cash flow and debt management
- Pensions and investment portfolios
- Tax planning strategies
- Business structure
- Risk management tools
- Estate planning documents

Construction of the Comprehensive Assessment

An advisor will then create a report of your financial health and determine where you're headed based on your current lifestyle.

Integrated believes this presents to you a clear picture of your habits and financial routines so that you can more accurately determine what your goals truly are and if anything needs adjusting.

Creation and Review of the Master Plan

Armed with the knowledge gained in previous meetings, an advisor then begins to set up a "Master Plan." This report will establish a link between your financial lifestyle and your financial goals.

Implementation of the Master Plan

After you decide you're ready to move forward with the Master Plan, an advisor will put the plan into motion. The correct outside managers will be hired, investments made, and outside connections such as accountants and lawyers established.

Ongoing Monitoring and Updating

Integrated advertises ongoing communication and customer service with clients. Integrated Wealth offers scheduled face-to-face meetings, additional meetings in the event of unexpected financial changes, yearly reports, exceptional customer service, and on-going education in financial matters.

Fee Transparency

Integrated Wealth states that they operate with total [transparency](#) in fees. They charge by percentage of portfolio size, not by investable accounts. Integrated Wealth Management describes their services as being best suited to individuals who are comfortable paying competitive fees to "competent professionals who deliver value."

Since the team of this Calgary financial advisor firm is paid based on the size of a client's portfolio they feel it ensures they maintain their dedicated interest in selecting the very best portfolio managers who will ensure clients' accounts thrive and grow.

Something that should also be noted is the fact that the fees are scaled to the total value of family accounts, instead of being based on the accounts being fully invested, and they're tax deductible for non-registered accounts, in contrast to mutual funds.

Networth Management Review

[Networth Management](#) has a long history as a leading Calgary financial planning firm, having been established in 1995. Networth says they specialize in helping their clients achieve their "true life goals," based on a concept of values-based investing.

Once these values are outlined, the team of this Calgary wealth management firm can help clients with the planning required to achieve those objectives. Networth is fast to point out that they are not stock brokers, nor do they promote certain products. They are also not commission-driven, and they don't see themselves as sales people.

Key Factors That Enabled This Firm to Rank as a Top 2017 Wealth Advisory Company in Calgary

Below are key factors that enabled Networth Management to rank as one of 2017's top investment advisors in Calgary, Alberta.

Value-Based Financial Planning

Networth explains that they offer [value-based financial planning](#) because they seek to know your personal values and goals. They strive to offer you financial peace of mind by helping you to both achieve and sustain your dreams and goals. To Networth, value-based financial planning means:

- Honest and independent advising
- No third-party affiliations
- Open door policy
- Personalizing services for each client
- Putting promises in writing
- Treating all clients and employees with the respect they deserve

Understanding Women's Unique Financial Needs

Networth also prides itself on recognizing the unique financial needs of women. They offer [services](#) filtered through a female-focused lens rather than ignoring or denying the particular financial needs of women.

Networth may make a perfect match for you if you are looking for a wealth advisory firm in Calgary that acknowledges the particular needs of women.

Advisors recognize these differences and serve clients accordingly, when appropriate. Such services often include:

- Divorce
- Ensuring settlement payments
- Tax issues
- Child rearing

- Death of spouse
- Preserving wealth
- Special needs children
- Unexpected family illness
- Aging parents

What Networth Doesn't Do

Networth, as one of the top independent financial advisory firms in Calgary, feels as if defining the things they don't do is as important as outlining what they do do. In addition to the things listed above, such as not being commission or sales-driven, Networth commits they will never do the following:

- Recommend high risk holdings
- Structure highly volatile portfolios
- Time the market
- Put all of your eggs in one basket
- Chase trends
- Speculate with your assets

Strong Client Relationships

Networth offers a high level of customer service and fosters long-term relationships with clients. Some examples of this premier level customer service include:

Independent Firm

They operate as an independent firm, which means they are not owned by an outside or larger financial institution.

Financial Road Map

Networth's website explains that every client will receive a financial road map, which is financial planning tool designed to organize your overall goals and financial values.

Comprehensive Services

Their site also describes how advisors take a holistic approach and ensure that a checklist of [143 points](#) is considered for each client. This promotes long-term relationships and maximizes returns. Other services include:

- Strategic tax planning
- Open door policy
- Multi-generational wealth planning
- Business strategies
- Succession planning

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

Northland Wealth Management Review

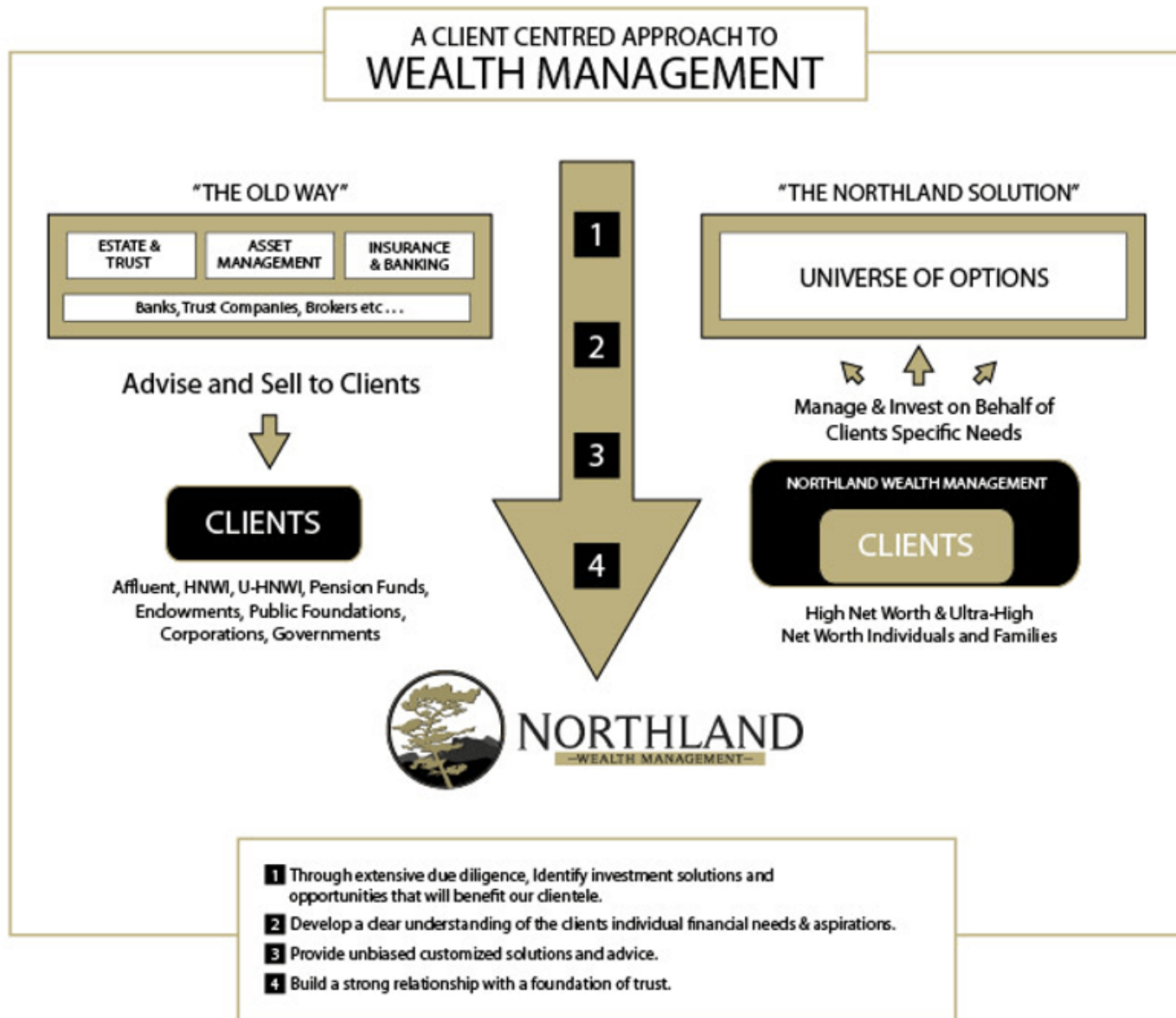
[Northland Wealth](#) is a Calgary-based firm offering over [150 years in combined advisor](#) experience in an independent boutique environment. The firm describes that they preserve boutique-sized benefits, however, Northland also maintains that they offer the benefits of a larger firm, such as a large and stable team, premier investment strategies, coordination between advisors, and access to global leaders in investing.

Key Factors That Enabled This Firm to Rank as a Top 2017 Wealth Advisory Company

Below are key factors that enabled Northland Wealth Management to rank as one of 2017's top financial advisors in Calgary, Alberta.

Independent, Client-Centered Approach

Unlike some other institutions like banks and trust companies, Northland offers independent advice.



Core Values

Advisors at Northland adhere to [five core values](#):

- Ethics and accountability: Avoiding conflicts of interests
- Adherence to beliefs: Seeing the whole picture above and beyond money matters
- Critical evaluation: Offering the best solutions possible
- Responsibility: Caring about clients and their families
- Peace of mind: Making sure clients sleep easy at night knowing their finances are cared for

Benefits of Both a Boutique Firm and a Large Firm

Northland consistently highlights the fact that they have brought together a unique and winning formula of being a boutique firm, but with the advantages of a large Calgary wealth management firm.

Benefits of a boutique Calgary financial advisor you will get as a client of Northland include:

- Personal knowledge your family
- A detailed understanding of your assets and planning needs
- Meetings can be arranged at your home or office
- Coordination of other advisors
- This Calgary financial advisor firm can serve as a stabilizing force through big life events
- The utmost in confidentiality

Some of the big firm-like benefits Northland can bring to the table include:

- Deep, stable talent
- Shared best practices
- Secure custody of assets and investments
- Advanced risk controls and systems
- Specialized investment mandates
- Access to top financial institutions throughout the world

Affiliations

Clients of Northland, one of Calgary's top financial advisor firms, benefit from their many professional and strategic affiliations.

These include:

- Canadian Association of Family Enterprise
 - The Family Firm Institute
 - Credential Financial
 - Portfolio Management Association of Canada
 - CFA Institute
 - National Bank Correspondent Network
-

Perron & Partners Wealth Management Review

[Perron & Partners Wealth Management](#) is a financial advisor in Calgary founded by Gary Perron in 2013. The firm now consists of 15 advisors and support team members and offers financial advice to individuals as well as institutions. Gary founded Perron and Partners to offer independent, unbiased financial advice to the Calgary community. Advisors boast a collective 100 plus years of experience, so you'll receive expert advice in a boutique, personalized environment.

Key Factors That Enabled This Firm to Rank as a Top 2017 Wealth Management Firm in Calgary

Below are key factors that enabled Perron and Partners Wealth Management to be rated as one of 2017's top financial firms in Calgary, Alberta.

Planning Process

Perron and Partners seeks to provide common sense advice without unnecessary complications. Advisors use a [four-step process](#) with each client:

Shared Understanding

During the first meeting, your advisor will learn your unique needs and expectations. They will also explain Perron's investment strategy and processes.

Developing an Investment Plan

Once advisors have learned about the current state of your financials, expectations, and tolerance for risk, they will begin the process of putting together your investment strategy.

Review and Forward Thinking

After the beginning stages of your relationship have solidified, Perron advisors will begin to educate you about the investment process. You'll have the chance to ask any questions regarding investment decisions, implementation, and goals.

90-Day Principle

Once you give the green light, your advisor will take action and put the investment plan into play within 90 days.

The relationship doesn't end once investment decisions have been made and the portfolio established, though. Going forward, you will receive updates from a relationship manager at least every 90 days.

Independent Advice

Perron is a fully independent Calgary financial advisor firm, and they define that independence as one of their biggest opportunities. They have a large platform, but there are still limits on the wealth advice Perron & Partners will provide, to the benefit of clients. They're not held back by corporate directives, sanctions, or limited by in-house resources.

This allows this Calgary wealth management firm to conduct research through a wide range of institutions, use multiple sources of ideas, select only the top-performing managers, and find the low-cost investments that are going to bring the most value to clients.

Retirement Planning

Perron specializes in [retirement planning](#) for both individuals and business owners. Your advisor will:

- Maintain your portfolio so that your investments match your retirement needs
- Keep your plan relevant to retirement
- Establish a succession plan
- Communicate regularly and educate you and your family with consistent contact and newsletters

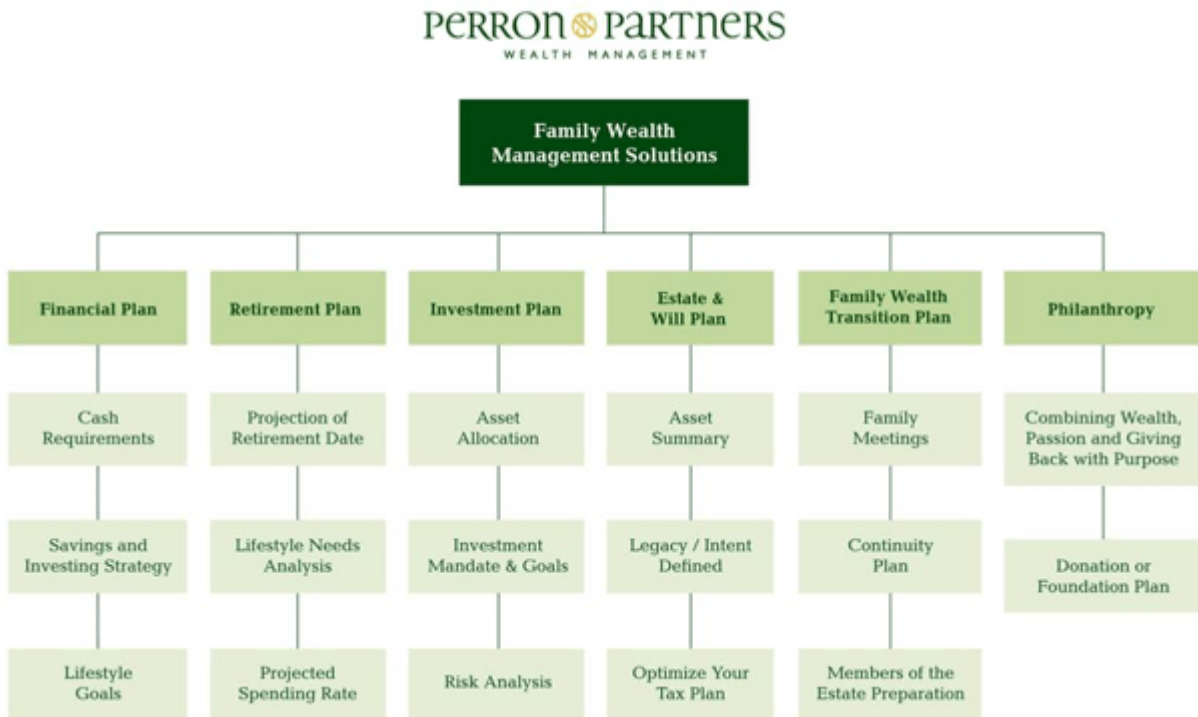
Unique Opportunities

Perron, one of Calgary's top financial advisor firms, outlines the following unique opportunities available to their clients:

- Truly customized and independent advice
- Better value through the delivery of tax and cost control initiatives
- The ability to invest without limits on selection, research or personalization

- Clients benefit from multiple sources of ideas
- Guidance is simple to guide clients through complex life situations
- Risk-adjusted returns ensure clients can stay protected from unnecessary risk
- When you try to contact Perron you'll always get a response
- There are a variety of educational resources available to clients including conference calls and newsletters

As an additional benefit, Perron has recently expanded their wealth management services, represented by the graph below.



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

Vega Estate Planning Corp Review

[Vega Estate Planning Corp](#) was founded by Yar Kolomijchuk, a Calgary native. Yar brings over 22 years of experience in the insurance and financial planning industry and works with a solid team of experienced advisors. Vega will organize your financials in-house and may also match you with outside specialists on an as-needed basis to ensure that you receive the best services possible for your particular financial needs.

Key Factors That Enabled This Firm to Rank as a Top 2017 Wealth Advisor in Calgary

Below are key factors that enabled Vega Estate Planning Corp. to rank as one of 2017's top financial advisors in Calgary, Alberta.

Independent Financial Planning

Vega Estate Planning Corp is an independent firm, so they don't operate with influences from a potentially conflicting affiliated institution. This promotes a fairer environment for the client.

Vega promises they are independent from any bank, brokerage, insurance or mutual fund company. This allows them to operate with the client's best interest as the foremost priority.

Wealth Planning Services

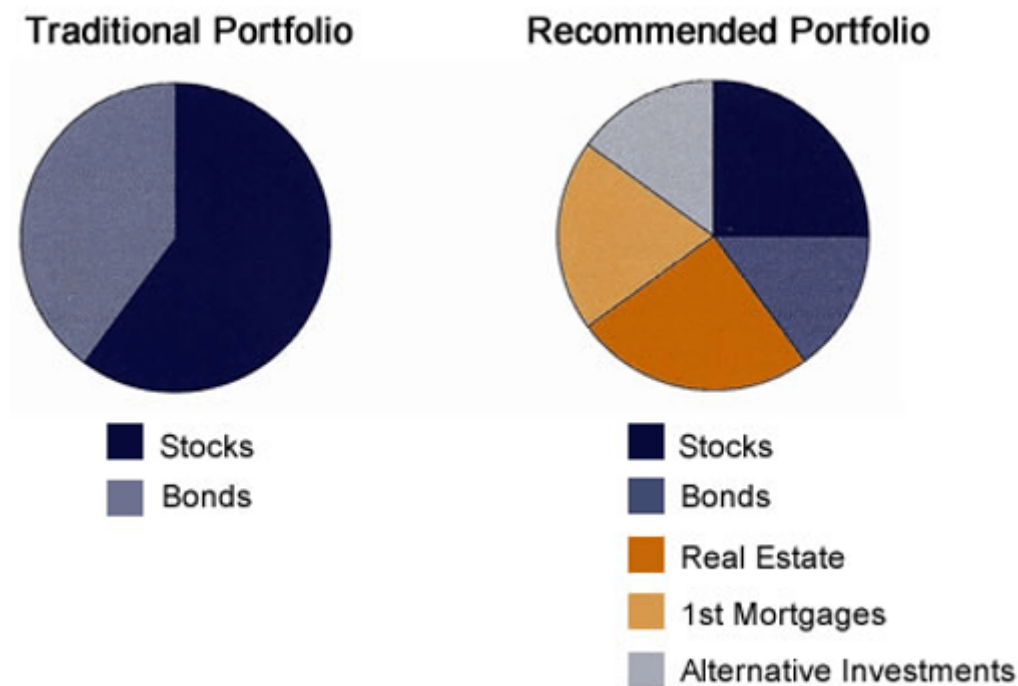
Vega provides comprehensive financial planning services:

- **Retirement:** An advisor will evaluate and project where you are currently headed based on your saving and spending habits, and then create a plan that caters to your personalized needs. Your advisor will also consider tax issues to ensure that you won't miss out on any opportunities for increased savings.
- **Risk Management and Life Insurance Review:** Vega will also evaluate the state of your insurance coverage to ensure you and your family are adequately protected in the event of an unplanned occurrence.
- **Vega Estate Plan:** This covers your will and power of attorney paperwork, executor instructions, and completes all open-ended issues related to your estate.

Vega also offers counselling for pension plans, insured annuities, estate bonds, and private investments.

Alternative Investments

Vega also stresses the importance of making [alternative investments](#) not connected to equities or fixed-income strategies. Such alternative investments can potentially maximize returns and decrease risk in an unpredictable market.



Vega suggests alternative investments such as:

- Land banking
- Real estate
- Mortgages
- Private equity
- Dividend yield products
- Flow through funds
- Segregated funds
- Exempt market funds

[WealthCo](#) is a financial planner in Calgary offering wealth planning, investment management, and risk management services. Together, their solid team of ten advisors brings over 100 years of experience in the financial planning industry.

Operating on an assets under management fee model, WealthCo offers the skill and experience you're looking for in a Calgary investment advisor.

Key Factors That Enabled This Firm to Rank as a Top 2017 Wealth Advisory Company

Below are key factors that enabled WealthCo to rank as one of 2017's top financial advisors in Calgary, Alberta.

Wealth Enhancer Planning Services

WealthCo applies a [four-step process](#) to wealth planning:

1. Clarity

In an initial meeting, advisors help clients create clarity and perspective, defining unique goals, relationships, and values.

2. Insight

This involves providing your advisor with comprehensive information about your past and present, helping WealthCo get to know you personally before making suggestions and building your financial plan.

3. Partnership

Advisors apply skill and experience to create a comprehensive and strategic plan for each client. At this stage, both the client and WealthCo advisors make a decision to commit to a financial plan and work together to accomplish goals.

4. Pulse

WealthCo will assess your performance on a quarterly basis, ensuring that your needs and goals are current and that necessary adjustments are made to your financial plan over time.

WealthCo Asset Management

This firm strongly emphasizes the importance of [diversifying investments](#). WealthCo's site explains that while the typical ratio for diversification calls for a 60/40 investment split, WealthCo takes diversification further.

Advisors suggest that aside from a 40/60 ratio of stocks and bonds, you should also invest in alternative investments, first mortgages, equities, stock options, and real estate. This helps protect you from an unpredictable market and helps you work toward your goals and maximize returns.

WealthCo Risk Management

This firm also offers [several packages](#) that address your risk management needs. Such insurance packages include:

- Life insurance
- Individual disability insurance
- Long-term care coverage
- Insured annuities
- Private health services plan
- Registered insured annuities
- Critical illness insurance

Planning for Diversification

Some of the ways WealthCo plans for [diversification](#) in the management of client portfolios include addressing the following:

- **Bonds:** Bonds are seen as the conventional counterweight to investing in securities, and they tend to protect portfolios in the event of market downturns.
- **Real estate:** The team of WealthCo believes one of the missing components from many portfolios is real estate. They believe that directly-owned real estate also serves as a good protection against market down times and declines.
- **Tax efficiency:** According to WealthCo, another common weakness they see in many portfolios is a lack of tax efficient planning and strategizing.

[Related: Top Financial Advisors in Tampa, St. Petersburg, and Palm Harbor, Florida](#)

Conclusion - Top 8 Financial Advisors in Calgary, Alberta

With so many firms offering financial planning services, the decision to sign with a particular firm is intimidating. The advisor you choose will comb through your personal life and make suggestions about not only your finances but your lifestyle as well. Your advisor will get to know you very closely, and you will have to put a lot of personal information out on the table to be scrutinized. The decisions you and your advisor make will affect both you and your family.

You don't want to give this responsibility to just anyone. It needs to be someone you can trust.

This list provides a breakdown of the services offered at eight of the best wealth management firms in Calgary. All of the firms bring high-level skills and experience to the table. However, the particular firm you choose depends on your individualized lifestyle and investment needs.

Be sure to read carefully and do your own research so that you're confident the firm you choose aligns with your personal beliefs, values, and financial goals. Most firms offer a free consultation, so you can do further research and set up an initial face-to-face meeting with a "short-list" of firms before finally settling with an advisor.

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