

Top 10 Best Financial Advisors in New Jersey | 2017 Ranking | New Jersey Wealth Management Firms

2017 RANKING & REVIEWS TOP RANKING NJ WEALTH MANAGEMENT FIRMS

Intro: Examining the Top 10 Best Financial Advisors in New Jersey

Choosing the right financial advisor isn't an easy task. Not only do you have to be willing to have open, honest conversations about money, but you also need to find an advisor that you trust to make good financial decisions on your behalf.

Whether you're building for retirement, saving for a home, or putting money away for your family, establishing a solid partnership with a financial advisor in New Jersey is a great way to ensure that your investments are safe, secure, and poised for growth.

When selecting an NJ financial advisor, you'll want to make sure that they have the expertise, transparency, values, and the services to match your unique financial needs.

For New Jersey residents, we've compiled a list of the best NJ wealth management firms and the best NJ financial advisors to put you on track towards reaching your long-term financial goals.



Award Emblem: Top 10 Best Financial Advisors in New Jersey

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

List is sorted alphabetically (click any of the firm names below to go directly to the detailed review section for that financial advisors in New Jersey).

- [**Baron Financial Group**](#)
- [**Chartered Financial Services, LLC**](#)
- [**HFM Investment Advisors**](#)
- [**HIGHLAND Financial Advisors, LLC**](#)
- [**Lighthouse Financial Advisors, Inc.**](#)
- [**Modera Wealth Management**](#)
- [**Mullooly Asset Management, Inc.**](#)
- [**Private Wealth Management Group**](#)
- [**SageBroadview**](#)

- [StonegateWealth Management](#)

Top 10 Best NJ Financial Advisors | Brief Comparison & Ranking

| Best Financial Advisors in New Jersey | Highlighted Features |
|---------------------------------------|--|
| Baron Financial Group | Financial services tailored to specifically assist women and families with special needs members |
| Chartered Financial Services, LLC | Fee-based financial planning strategies |
| HFM Investment Advisors | Focus on empowering clients through communication and education |
| HIGHLAND Financial Advisors, LLC | Fee-only services and fiduciary commitment |
| Lighthouse Financial Advisors, Inc. | Ethics-driven financial planning and investment philosophy |
| Main Street Financial Life Advisors | Comprehensive financial planning process |
| Modera Wealth Management | Strong history of achievement and industry recognition |
| Mullooly Asset Management, Inc. | Collaborative investing and advisement approach |
| Private Wealth Management Group | Value-driven financial services and wealth management |
| SageBroadview | Tailored services for business professionals and corporate executives |
| StonegateWealth Management | Dynamic investment management approach |

Table: Top 10 Best Financial Advisors in New Jersey | Above list is sorted alphabetically

AdvisoryHQ's Selection Methodology

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

Please click here “[AdvisoryHQ’s Ranking Methodologies](#)” for a detailed review of AdvisoryHQ’s selection methodologies for ranking top-rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Top Ranking Best NJ Wealth Management Firms

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

Baron Financial Group Review

Located in Fair Lawn, New Jersey, [Baron Financial Group](#) is an independent, fee-only financial planner in NJ.

This NJ wealth management firm prides itself on comprehensive, personalized service from a highly-qualified [team of investment professionals](#), assigning each client two advisors and a client relationship specialist.

As a [fiduciary](#) financial advisor in New Jersey, clients can trust that Baron Financial Group will always act in their best interests.

Additionally, as a fee-only firm, this top NJ financial advisor does not accept commissions or additional income, meaning that the success of each client’s portfolio is a direct reflection of their own success.

Key Factors That Enabled This Firm to Rank as One of the Best Financial Advisors in New Jersey

Below, please find a list of key factors that earned Baron Financial Group a spot on our list of the best NJ financial advisors.

Areas of Client Expertise

Just as no two NJ wealth advisors are alike, each client brings their own unique financial needs and goals.

Part of what makes Baron Financial Group a top financial advisor in New Jersey is that they recognize these individual needs.

As one of the best financial advisors in New Jersey, Baron Financial Group is particularly skilled at serving the following [types of clients](#):

- Retirees
- Individuals and Families
- Women
- Families with Special Needs
- Organizations

What truly makes this NJ financial advisor stand out is their focus on providing tailored services for women and families with special needs, detailed below.

Women

To provide the best possible [financial services for women](#), this top financial advisor in NJ is dedicated to helping women pursue their dreams on their own terms. This means focusing on education and communication to prepare for life events like:

- Preparing for retirement
- Creating a career
- Investing in yourself
- Caring for children
- Unexpected turns
- Divorce or widowhood
- Caring for elderly parents
- Family needs
- Launching a business

This commitment to providing valuable financial services for women has paid off—Baron Financial Group has received the [Women's Choice Award](#) for five consecutive years, from [2013-2017](#).

Families with Special Needs

Baron Financial Group recognizes that families with special needs members have unique—and often complicated—financial goals and requirements.

Coordinating a financial plan between special needs children and their parents isn't always easy, which is why finding an experienced NJ financial advisor is crucial.

To best benefit these families, this financial advisor in NJ will implement and coordinate the [following services](#):

- Comprehensive financial planning
- Knowledge of eligibility requirements for disability and government programs
- Legal, Education, Care Management, Residential, and Income Tax planning

It's worth mentioning that this client focus comes with personal ties to the firm.

The founder, [Victor P. Cannillo](#), has [over 25 years](#) of personal involvement with a special needs individuals, and is actively involved in [Spectrum for Living](#), a not-for-profit organization dedicated to supporting adults with developmental and/or physical disabilities.



Detailed Investment Philosophy

As one of the best financial advisors in New Jersey, Baron Financial Group employs a detailed, client-driven investment philosophy to help portfolios reach their maximum potential.

Called “High Stability Wealth Management,” this investment philosophy breaks down into [six key components](#):

- Understanding the client’s financial goals and timeframe
- Identifying financial resources and any financial risks
- Studying client information and evaluating options
- Recommending a strategy for client's approval
- Implementing and managing the approved plan
- Monitoring and adjusting portfolios and recommendations

Ultimately, this NJ wealth management firm uses a mix of [asset management](#) and [customized financial planning](#) to deliver results-driven strategies that are unique, flexible, and sustainable for each client.

Expert Asset Management

As one of the top financial advisors in NJ, Baron Financial Group is committed to designing portfolios to help every client reach their financial goals, which means using an expert approach to [asset management](#).

For this financial planner in NJ, asset management is accomplished through what they call “[The Seven Essentials for Portfolio Strategy Success](#),” which include:

- Diversify across asset classes
- Objective security selections
- Individual bond selections
- Rebalance
- Capitalize on institutional pricing
- Maximize tax efficiency
- Behavioral discipline

Perhaps the most intriguing of all is their commitment to behavioral discipline, or what they call making “decisions based on merit, not emotions.”

This includes choosing to hire—or replace—investment managers and fund managers based on research and analysis to find the best long-term fit, rather than making emotional decisions.

This focus on long-term growth and data-driven analysis makes Baron Financial Group one of the best financial advisors in NJ for residents to consider.

Customized Financial Planning

For this top NJ wealth management firm, customized financial planning means providing advice for clients throughout every possible financial hurdle. This includes providing:

- Advice on all financial questions
- Medicare specialist analysis
- Financial planning advice for children and family
- Mortgage and refinance resources
- Third-party insurance reviews
- Estate attorney referrals for wills and trusts

See Also: [Best Financial Advisors in Lexington & Louisville, Kentucky | Ranking | Kentucky Wealth Management Firms](#)

Chartered Financial Services, LLC Review

Based in Warren, New Jersey, [Chartered Financial Services, LLC](#) is one of the top fee-based NJ wealth management firms to consider partnering with.

Composed of [six advisors and six support staff](#), the team at Chartered Financial Services is close-knit and experienced, bringing decades of professional experience and certifications to the table.

As one of the best financial advisors in New Jersey, Chartered Financial Services is licensed to handle a variety of securities, including life insurance, variable life insurance, property and casualty, mutual funds, fixed annuities, and variable annuities.

Key Factors That Enabled This Firm to Rank as One of the Best Financial Advisors in New Jersey

Below, please find a list of key factors that earned Chartered Financial Services, LLC a spot on our list of the best NJ financial advisors.

Family-Led Investment Firm

[John R. Benton](#), founder and owner, began Chartered Financial Services with his wife and business partner, [Nina Benton](#). Collectively, the pair have over 50 years of experience in the financial industry.

In 2011 and 2013, their daughters [Emily Benton-Fissel](#) and [Sara Benton](#) as financial advisors and Property and Casual managers.

It's rare to find an NJ wealth management firm that is family-owned and operated, making Chartered Financial Services the best New Jersey investment advisor for clients that want a close-knit, family-oriented environment.



Comprehensive Services

As one of the best financial advisors in New Jersey, Chartered Financial Services, LLC provides a comprehensive [suite of services](#) to their clients. These services are broken down into three groups, detailed below:

Insurance

- Disability Income Insurance
- Life Insurance

- Long Term Care Insurance
- Automobile Insurance
- Homeowner's Insurance
- Umbrella Insurance

Financial Planning

- Fee-Based Financial Planning
- Estate Planning Strategies
- Retirement Income Distribution Planning
- Retirement and Legacy Planning

Investments

- Variable Annuities
- Fixed Annuities
- Brokerage Accounts
- Traditional, Roth, and Simple IRAs

Fee-Based Financial Planning

Chartered Financial Services, LLC provides [fee-based financial planning](#), offering hourly, focused, and comprehensive plans for clients.

This means that clients of this top financial planner in NJ can choose to structure their financial planning through any of the following:

- Hourly planning to discuss and evaluate specific matters
- Focused plan to address retirement, estate planning, insurance, or business needs
- Comprehensive plan to address a combination of the two

Thorough Approach to Financial Planning

As one of the best financial advisors in New Jersey, Chartered Financial Services employs a thorough approach to provide successful financial planning services for their clients.

This approach relies heavily on a client-centric focus, including steps like:

- Clarifying, quantifying, and identifying your goals to provide a life that has meaning, joy and financial stability

- Gathering information to assist in making educated and informed decisions
- Establishing critical assumptions for your plan
- Finding the most effective and appropriate tools to implement your strategy
- Identifying expectations for loved ones in the event of a premature death, disability, or long-term care event
- Creating a financial plan with strategies to pursue goals and provide solutions to hidden risks
- Meet with family members, executors, and other advisors upon request
- Periodically update each financial plan to adjust and reprioritize as needed

[Don't Miss: Top Financial Advisors in Tampa, St. Petersburg, and Palm Harbor, Florida](#)

HFM Investment Advisors Review

Serving clients since 1989, [HFM Investment Advisors](#) is an independent, fee-based firm of NJ wealth advisors in Glassboro, New Jersey.

Rather than simply taking orders and managing investments, this financial advisor in NJ focuses on empowering their clients.

With regular communication and a strong emphasis on education, this New Jersey investment advisor vows to “keep you educated, involved, and confident in every financial decision you make.”

Key Factors That Enabled This Firm to Rank as One of the Best Financial Advisors in New Jersey

Below, please find a list of key factors that earned HFM Investment Advisors a spot on our list of the best NJ financial advisors.

Wide Range of Services

There are plenty of options for financial management at HFM, making them one of the most comprehensive and best financial advisors in New Jersey. These services range from traditional to niche financial services, including:

- Estate Planning
- 401k Fund Allocation
- Stock Options & Deferred Compensation
- Insurance Coverage
- College Savings
- Cash Flow and Savings Plan
- Investor Coaching
- Investment Management
- Financial Planning

R.I.C.H. Approach to Readiness

As a top financial advisor in NJ, HFM strives to set their clients up for success, no matter what their unique financial plan entails.

This means following the [R.I.C.H. Approach to Readiness](#) to “build a community of educated investors who are ready for whatever life throws their way.”

Their unique approach involves a series of financial ethics, discipline, and philosophy through the following steps:

Relationship Building

Clients can rest assured that this financial advisor in New Jersey will take the time to thoroughly understand all their financial needs and goals, creating long-term relationships by listening, coaching, and teaching.

Inspiring You to Dream Big

No matter what their goal is, HFM is committed to diligently crafting the best financial plan to help clients reach their own success.

Coaching Our Investors

For this best financial advisor in New Jersey, empowering clients through education and communication is paramount.

The NJ wealth advisors at HFM will help clients understand their portfolios to better prepare them for financial challenges throughout the investment process, providing confidence and clarity.

Holding You Accountable

Closely related to coaching is accountability, which means helping clients understand investment strategies and their impact over the long-term.



Realistic Approach to Retirement

The thought of retirement can be an intimidating one, particularly because the process of saving often begins decades in advance.

Clients [saving for retirement with HFM](#) benefit from a straightforward, realistic approach, which includes asking questions like:

- What if Social Security pays less than expected?
- What if one person—or both—needs a long-term care facility?
- Is our retirement lifestyle sustainable?
- Can our income keep up with inflation?

With so many unforeseen costs and life events, effectively planning for retirement can be challenging, which is something that this best financial advisor in New Jersey embraces.

Related: [Best Financial Advisors in Pittsburgh, Pennsylvania](#)

HIGHLAND Financial Advisors, LLC Review

Located in Wayne, New Jersey, [HIGHLAND Financial Advisors, LLC](#) is an independent, fee-only financial advisor in NJ.

The firm offers financial planning services to high net worth families and individuals within the New Jersey area and across the country, offering a [free initial consultation](#) in person or via video call.

As one of the best financial advisors in New Jersey, HIGHLAND maintains a thorough, detailed, and personalized process to help clients reach their financial goals.

Key Factors That Enabled This Firm to Rank as One of the Best Financial Advisors in New Jersey

Below, please find a list of key factors that earned HIGHLAND Financial Advisors, LLC a spot on our list of the best NJ financial advisors.



HIGHLAND
FINANCIAL ADVISORS

Fee-Only & Fiduciary Advisor

As an [independent, fee-only](#) NJ financial advisor, HIGHLAND is committed to offering sound financial advice, not pitching sales.

This means that they do not receive any outside commissions for selling financial products, nor do they sell insurance.

Fiduciary Commitment

Closely related to fee-only services is the fiduciary commitment that all HIGHLAND advisors have taken.

Within the financial industry, this is one of the best ways to instill trust between client and advisor, and this financial advisor in NJ proudly advertises their [fiduciary duty](#).

As a [fiduciary](#), HIGHLAND advisors each have a legal duty to set aside any conflicts of interest to pursue the best financial solution for each and every client.

As a firm that puts client trust first and foremost, HIGHLAND is one of the best financial advisors in New Jersey to consider.

Small, Experienced Team

This NJ financial advisor may not boast a large staff like other NJ wealth management firms, but what they lack in numbers, they surpass in experience and personalized attention.

HIGHLAND Financial Advisors consists of a dedicated [team of certified financial planners](#), including:

- Reed C. Frassa, Managing Director, CFP®, AIF®, RLP®
- Peter J. McKenna, CFP®, MBA
- Edward J. Leach, CFP®, MBA

Despite their small size, this group of best financial advisors in New Jersey have a collective experience of [nearly five decades](#), over \$215 million in assets under management, and 179 clients.

Holistic Financial Services

As one of the best financial advisors in New Jersey, HIGHLAND Financial Advisors strives to provide customized, holistic financial services to keep their clients on track to reach their financial goals. These services include:

The Big Picture: Goal-Centric Planning

With HIGHLAND, clients can expect their financial planner in NJ to spend time unearthing their unique financial goals and expectations for the future.

For this NJ wealth management firm, every successful financial plan starts by examining [The Big Picture](#) to rediscover and redefine goals, aligning present—and future—financial resources.

A Disciplined Approach

Keeping a [disciplined approach](#) to investing is what sets a portfolio up for the greatest amount of success with the least amount of risk, allowing for reviewing and rebalancing when needed.

Protecting Family and Lifestyle

As a top New Jersey investment advisor, HIGHLAND strives to keep clients prepared for the future. [Protecting family and lifestyle](#) is a way to prepare and address unexpected risks that could derail goal achievement down the road.

Achieving Financial Comfort

No matter where you are in the planning process, retirement is all about [achieving financial comfort](#).

To help propel clients towards retirement, these NJ wealth advisors focus on supporting cash flow and minimizing the risks of:

- Not saving enough
- Not investing properly
- Running out of money

Building a Legacy

For this best financial advisor in New Jersey, [building a legacy](#) means providing guidance for future generations and preserving your values. These services include:

- Estate Planning
- Wealth Transfer Plans
- Charitable Philosophy

The Person is the Plan®

As one of the best financial advisors in New Jersey, HIGHLAND strives to set clients up for success as early as possible, creating thorough and personalized financial plans.

This proprietary process is called “[The Person is the Plan](#),” and it includes the following steps:

- **Discovery**—Clients and advisors work together to discover, explore, and clarify goals

- **Financial Planning**—Can include cash flow analysis, risk management, investments, income taxes, and more
- **Mutual Commitment**—Clients understand how to reach their financial goals, and their advisor continues to offer guidance
- **Monitoring Progress**—Periodically reviewing goals, investment portfolio, life transitions, and projections, adjusting as needed

Popular Article: [**Best Financial Advisors in Miami and Coral Gables, Florida**](#)

Lighthouse Financial Advisors, Inc. Review

Located in Red Bank, [Lighthouse Financial Advisors, Inc.](#) has been a top New Jersey investment advisor since 1999.

As a fee-only, fiduciary NJ wealth management firm, LFA works in the best interest of their clients, forgoing any commissions or kickbacks.

With [no minimum or maximum dollar requirement](#), this NJ financial advisor is open to anyone who needs financial assistance, regardless of their asset size.

Key Factors That Enabled This Firm to Rank as One of the Best Financial Advisors in New Jersey

Below, please find a list of key factors that earned Lighthouse Financial Advisors, Inc. a spot on our list of the best NJ financial advisors.

Wide Range of Services

As one of the best financial advisors in New Jersey, LFA offers a variety of [financial services](#) to their clients, including:

- Portfolio Analysis/Net Worth
- Record Keeping & Spending Plan
- Mortgage Review/Refinance Analysis
- Debt Management, Reduction & Leverage
- Education Planning
- Financial Independence Planning/Retirement Analysis
- Estate Planning

- Rollovers, Pension Plans, Annuities
- Goal Setting
- Investment Implementation
- Life Insurance/Other Insurance Analysis
- Tax Planning/Tax Projection
- Tax Preparation
- Review Employee Benefits
- Financial/Life/Small Business/Entrepreneurial Coaching

Investment Philosophy

LFA believes that the best investing approach comes from working together with clients to avoid costly mistakes and take advantage of unique opportunities.

Their [investment philosophy](#) involves getting to know individual client needs, outlining goals, and focusing on all areas of your financial life.

Rather than “extraordinary income,” this top financial advisor in New Jersey uses a much more realistic and achievable philosophy:

- Focusing on early saving and investing
- Making regular contributions
- Consistent dedication to living within your means
- Choosing tax-efficient, low-cost investments

Canon of Ethics

For many investors, finding a trustworthy, principled NJ financial advisor is the best way to ensure that their funds are held responsibly.

As a value-driven financial advisor in NJ, Lighthouse Financial Advisors adheres to a [Canon of Ethics](#), which includes:

- As a fiduciary, LFA will put a client’s needs first and foremost
- All agreed-upon work will be completed in a timely and prompt manner
- As fee-only advisors, LFA will act objectively, and will not accept commissions
- LFA will continuously strive to improve their services
- Advisors will maintain the highest level of professional integrity
- All client information is held confidentially to the extent allowed by law

Letter from the Founder

Lighthouse Financial Advisors, Inc. is a financial advisor in New Jersey that values and respects the importance of personal relationships.

One way this NJ financial advisor demonstrates their focus on forging personal relationships is through [a letter](#) from the founder of LFA, [Robert B. Walsh Jr.](#)

Addressed to all clients, future and current, Walsh provides personal anecdotes from his early life and career to provide a framework for the values at LFA—ensuring that families and loved ones are well taken care of. In his own words,

*Every day we strive to deliver excellence and outstanding customer service because **we never forget our clients are people with hopes, dreams, desires and fears.** It is my hope that you get to experience our passion, caring, professionalism and dedication to helping you on your unique journey.*

It's a refreshing and boldly honest way to create a connection with a potential client even before they walk in the door.

Not many wealth management firms in NJ focus on creating this type of connection, which makes LFA stand out as one of the best financial advisors in New Jersey.

Read More: [Top Financial Advisors in Orlando, Florida](#)

Modera Wealth Management Review

[Modera Wealth Management](#) is a fee-only NJ wealth management firm with [over \\$2 billion](#) in assets, offering financial services to individuals, families, trusts, institutions, and philanthropic organizations.

Their focus is on providing objective advice, personalized attention, and comprehensive resources to help clients with [at least \\$1 million](#) in investment assets to successfully manage their wealth.

Along with an [office in Westwood, New Jersey](#), this top NJ financial advisor also maintains offices in Massachusetts, Florida, and Georgia.

Key Factors That Enabled This Firm to Rank as One of the Best Financial Advisors in New Jersey

Below, please find a list of key factors that earned Modera Wealth Management a spot on our list of the best NJ financial advisors.

Investment Philosophy

Modera Wealth Management uses a long-term approach to all investments, working closely with clients to foster relationships and encourage portfolio growth.

As defined by this NJ wealth management firm, their investment philosophy consists of four related components, listed below.

Individualized, Long-Term Approach

Modera creates, implements, and manages diversified portfolios for their clients, ensuring that each portfolio is customized to meet individual financial goals.

Take No More Risk Than Needed

For this financial advisor in New Jersey, a fulfilling investment experience comes from successfully managing risk.

As a result, Modera emphasizes downside protection to construct risk-conscious portfolios, ensuring reliable long-term results rather than unreliable, short-term performance.

Disciplined Diversification

To reduce volatility and improve risk management, this financial planner in NJ uses disciplined diversification of asset classes for each portfolio. This includes measuring the performance, volatility, and correlation characteristics across multiple asset classes.

Actively Managed, Individually Delivered

Backed by academic research, Modera maintains that the best way to ensure long-term performance is to actively manage securities. As such, each asset class is thoroughly vetted, acquired inexpensively, and consistently monitored.

**Your Goals.
Our Guidance.**

As a fee-only wealth management firm, Modera works with individuals, families, trusts, institutions, and philanthropic organizations to build customized plans and portfolios in their best interests. We provide objective advice, personal attention, and comprehensive resources to help our clients reach their unique goals. From financial planning to portfolio management, we understand the nuances of managing wealth and have been guiding generations of clients in making informed financial decisions.

Latest Insight
[Cutting Through the Noise: Keep a Long-Term Perspective](#)

Wealth Management Services

For those that need wealth management services, Modera is a great financial advisor in New Jersey to consider.

Their process begins with a thorough analysis of your unique goals and current financial wellbeing, culminating with an expertly-crafted wealth management strategy.

Specific wealth management services available through this NJ financial advisor include:

- Retirement planning
- Portfolio management and asset allocation
- Cash flow and savings analysis
- Estate planning
- Tax planning and tax reduction strategies
- Risk management and insurance review
- Disability planning
- College funding
- Intergenerational wealth transfer strategies

- Charitable giving

Industry Recognition & Awards

As a top NJ financial advisor, Modera Wealth Management has accumulated a wide range of [awards and industry recognition](#) for their exceptional financial services. These include:

- Honored by [Financial Advisor](#) as one of the Top 50 Fastest Growing RIAs in 2017
- Featured as one of America's Fastest-Growing Companies by [Inc. Magazine](#) from 2012-2017
- Awarded as one of the 300 Top Registered Investment Advisors by [Financial Times](#) from 2014-2017
- Featured as one of the Best Places to Work in Money Management by [Pensions & Investments](#) in 2012 and 2016
- Recognized as one of the Top 150 RIA Firms by [Financial Planning Magazine](#) in 2016

Portfolio Management for Institutional Clients

Finding an NJ wealth management firm equipped to handle the unique portfolio management needs of institutional clients can be challenging.

Modera Wealth Management is uniquely positioned to help foundations, endowments, and other non-profits through their comprehensive [portfolio management](#).

This top NJ financial advisor focuses on embodying a “full-service investment partner,” which includes:

- Ongoing guidance for investment strategies, withdrawal rates, and distribution strategies
- Developing a diversified investment approach to align with unique institutional goals and values
- A customized policy statement to identify and prioritize financial objectives
- Comprehensive quarterly performance reports

Their ability to partner with committees, board members, and trustees makes Modera one of the best financial advisors in NJ for institutional clients to consider.

Related: [Best Financial Advisors in Omaha, Nebraska](#)

Mullooly Asset Management, Inc. Review

Founded in 2002, [Mullooly Asset Management, Inc.](#) is a family of fee-only investment advisors located in Wall Township, NJ.

As one of the best financial advisors in New Jersey, Mullooly Asset Management uses a unique proprietary approach to “[Helping Unite Man and Net-worth](#),” called the H.U.M.A.N. Approach.

Using this approach, this top NJ financial advisor seeks to help clients achieve and enjoy what they call “a work optional lifestyle” through calculated, efficient advisement.

Key Factors That Enabled This Firm to Rank as One of the Best Financial Advisors in New Jersey

Below, please find a list of key factors that earned Mullooly Asset Management, Inc. a spot on our list of the best NJ financial advisors.

Family-Owned & Operated

It’s rare to find wealth management firms in NJ that are family-owned and operated, which makes Mullooly Asset Management stand out among other competing NJ financial advisors.

Founded and led by investment advisor [Thomas P. Mullooly](#), the firm also includes his three sons:

- [Brendan Mullooly](#)—CFP®, Investment Advisor Representative
- [Tim Mullooly](#)—Investment Advisor Representative
- [Thomas Casey Mullooly](#)—Investment Advisor Representative

While some family dynamics may create a challenging workplace, this does not appear to be the case at Mullooly Asset Management.

Their emphasis on transparency, teamwork, and honesty has given them [second and third generation clients](#), which certainly speaks to the successful connections made between clients and advisors.



Fiduciary Standard & Fee-Only Services

Finding a reliable, trustworthy financial planner in NJ often depends upon whether a firm has taken a fiduciary oath.

Mullooly Asset Management operates underneath the [fiduciary standard](#), meaning that they are legally obligated to act in their client's best interest at all times.

[According to fiduciary standards](#), this best financial advisor in New Jersey is also committed to:

- Providing full and fair disclosure of all important facts
- Fully disclosing any potential conflicts of interest

Fee-Only

Closely related to the fiduciary standard is Mullooly Asset Management's commitment to offering [fee-only](#) financial services.

Clients can rest assured that this best financial advisor in New Jersey maintains fee-only practices and philosophies, meaning that the firm does not receive commissions, kickbacks, or incentives for any financial products.

With fee-only management, clients can rest assured that they are receiving transparent, unbiased advice, as the firm's success is defined by each client's individual success.

Investment Management Process

One unique aspect of the [investment management process](#) at Mullooly Asset Management is the focus on collaboration and teamwork. As described on the firm's website:

The team meets each morning to discuss pertinent market and economic data, review our investment research, and analyze our investment positions. This ensures each client investment position is thoroughly researched and continues to be actively monitored over time.

This emphasis on collaboration and teamwork also applies to the relationship between advisor and client.

As one of the best financial advisors in New Jersey, Mullooly Asset Management is committed to providing clients with the confidence and fortitude to bypass short-term downfalls and keep their sights on long-term benefits.

For this financial advisor in NJ, confidence comes from using [systematic risk management methodology](#) to bypass emotional reactions and use investing logic to push onwards towards greater returns in the future.

Don't Miss: [Top Financial Advisors in Dallas, Texas \(Ranking of Dallas Wealth Advisors\)](#)

Private Wealth Management Group Review

Founded in 1998, [Private Wealth Management Group](#) is a fee-only New Jersey investment advisor and financial planner located in Princeton.

As one of the top financial advisors in NJ, Private Wealth Management Group seeks to provide clients with [peace of mind](#) to spend time creating a passionate, fulfilling life, rather than worrying about financial matters.

For new clients, this best financial advisor in New Jersey offers a complimentary [Discovery Meeting](#) to discuss financial goals and determine if their services are the best fit for you.

Key Factors That Enabled This Firm to Rank as One of the Best Financial Advisors in New Jersey

Below, please find a list of key factors that earned Private Wealth Management Group a spot on our list of the best NJ financial advisors.

Fiduciary Standard & Fee-Only Services

Finding a reliable, trustworthy financial planner in NJ is crucial. Not only does trust come from a positive relationship between advisors and their clients, but it also stems from whether an NJ financial advisor assumes a fiduciary role.

Private Wealth Management Group holds themselves to a [fiduciary responsibility](#) within all client advisement, meaning that the firm is always acting in their client's best interest.

[According to fiduciary standards](#), this best financial advisor in New Jersey is also committed to:

- Providing full and fair disclosure of all important facts
- Fully disclosing any potential conflicts of interest

Fee-Only

Closely related to the fiduciary standard is Private Wealth Management Group's commitment to offering [fee-only](#) comprehensive wealth management.

Clients can rest assured that this best financial advisor in New Jersey maintains fee-only practices and philosophies, meaning that the firm does not receive commissions, kickbacks, or incentives for any financial products.

Value-Driven Financial Services

As one of the best financial advisors in New Jersey, Private Wealth Management Group is committed to providing exceptional financial services based on [five core values](#):

- Maintain INTEGRITY and a high moral standard
- Be HUMBLE and continuously seek knowledge
- Remain EMPATHETIC to the needs of our clients
- Achieve EXCELLENCE in everything we do
- Be ENTREPRENEURIAL through creativity, motivation, and adaptability

With these core values as a foundation, Private Wealth Management Group can meet a diverse range of clients and financial needs with personal service and expert guidance.

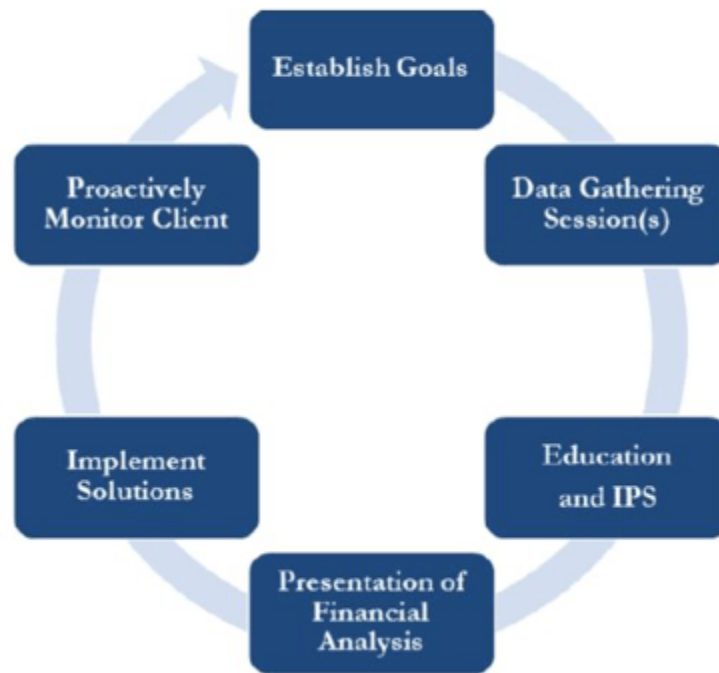
Comprehensive Financial Planning

To create a complete, individualized strategy, Private Wealth Management Group employs [comprehensive financial planning](#).

It's a holistic approach to establishing goals and creating a manageable plan to achieve those goals, which includes:

- **Client Personal Discovery**—Identify goals, ambitions, and your relationship with money
- **Data Gathering Sessions**—Clarify your personal financial circumstances
- **Investment Education and Investment Policy Statement**—Gain confidence through rational, methodical, and individualized financial decisions
- **Presentation of Financial Analysis and Recommendations**—Receive a comprehensive assessment and detailed action plan
- **Implementation**—Feel secure knowing that your wealth plan is in action
- **Proactive Monitoring and Plan Reviews**—Have the freedom to enjoy your life knowing that your finances are in good hands

YOUR PERSONAL WEALTH EXPERIENCE



Popular Article: [Top Financial Advisors in Kansas City, Leawood, and North Kansas City](#)

SageBroadview Review

One of our picks for the best financial advisors in New Jersey is [SageBroadview](#), a fee-only NJ wealth management, tax, and financial planning firm in Morristown.

With a focus on serving busy professionals and corporate managers, SageBroadview [invites their clients](#) to “Leave your financial worries and tasks to us. Rediscover your free time.”

Along with their Morristown office, this top financial advisor in NJ also serves clients through their Farmington, CT and Burlington, MA offices.

Key Factors That Enabled This Firm to Rank as One of the Best Financial Advisors in New Jersey

Below, please find a list of key factors that earned SageBroadview a spot on our list of the best NJ financial advisors.

“Get Acquainted” Session

New clients are welcome to meet with this NJ financial advisor for a complimentary, no-obligation meeting, called the “[Get Acquainted](#)” session.

Lasting [about 90 minutes](#), this meeting is a great opportunity for both clients and advisors to determine whether SageBroadview is the best fit for their financial goals.

Before the meeting, potential clients are asked to fill out a [brief questionnaire](#) to assist in clarifying their current financial situation and what they are looking for in an NJ financial advisor.

If a client is not a good fit, SageBroadview is committed to honesty and transparency. This financial advisor will communicate whether they feel their services are a good fit, and recommend another service that may be better-suited.

This commitment to honesty, transparency, and no-obligation exploration of options makes SageBroadview a great financial advisor in New Jersey for new clients to consider.

Limited Client Base

Although many firms offer a similar complimentary meeting service, what sets SageBroadview apart is a keen understanding and explanation of *why* this session is so important.

As one of the best financial advisors in New Jersey, SageBroadview prefers to care for a manageable number of clients that can truly benefit from their advisory services, rather than accepting as many clients as possible.

This is beneficial not only for the firm, but it’s also great for clients. This limitation means that NJ financial advisors can provide personalized attention to financial goals that match their unique skillset, maximizing financial growth for each client.



SageBroadview

APPRECIATE THE WEALTH OF YOUR LIFE

Niche Focus on Busy Professionals

Not all financial advisors in NJ are prepared to handle the unique financial challenges held by busy professionals and business executives—like taxes, employee benefits, or stock options—which is where SageBroadview truly shines.

As a top financial advisor in New Jersey, SageBroadview specializes in serving the needs of:

- Corporate executives/managers
- Medical professionals
- Attorneys
- Small business owners

[As stated by the firm](#), they are best positioned to assist clients “who have experienced accelerated accumulation or successfully transitioned into early retirement.”

Their niche focus on business and corporate professionals makes SageBroadview one of the best financial advisors in New Jersey for busy professionals looking for guidance through an array of personal and business-related financial challenges.

Three-Pillared Approach

Rather than offering three separate branches of financial services, SageBroadview provides a comprehensive client experience by combining [Financial Life Planning](#), [Money Management](#), and [Tax Management](#) into one seamless approach.

Perhaps the most beneficial pillar comes from tax management, a financial factor that is often overlooked throughout the financial planning process.

For business professionals, integrating tax management is particularly important. It can help minimize tax obligations, budget for any applicable payments, and ensure that there are no surprises come tax season.

While each category offers its own unique benefits, combining the three creates a unique, holistic approach to financial management.

This three-pillared approach to financial planning sets clients up for success in every aspect of financial planning, making SageBroadview stand out as one of the best financial advisors in New Jersey.

Stonegate Wealth Management Review

[Stonegate Wealth Management](#) is a fee-only investment and financial advisor in New Jersey.

Located in Oakland, this NJ financial advisor is well-equipped to serve a variety of clients, including business owners, inheritors, executives, medical professionals, retirees, and entrepreneurs.

No matter what category they fall under, clients can rest assured that Stonegate Wealth Management will provide professional advisement under the fiduciary standard, putting client needs first.

Key Factors That Enabled This Firm to Rank as One of the Best Financial Advisors in New Jersey

Below, please find a list of key factors that earned Stonegate Wealth Management a spot on our list of the best NJ financial advisors.

The Stonegate Difference

There are plenty of advisory and wealth management firms in NJ, but how do you know that you are partnering with the best NJ financial advisor for you?

In the case of Stonegate Wealth Management, there are some very clear advantages to choosing their financial advisory services, which they call “[The Stonegate Difference](#).” These advantages include:

Experienced Core Management Team

Part of what makes Stonegate one of the top financial advisors in NJ is the vast range of experience held by the firm.

The senior wealth managers at Stonegate Wealth Management have a combined experience spanning [more than 100 years](#) in the financial industry.

Sound Principles

This best financial advisor in New Jersey prides itself on remaining effective through two guiding principles: strong client relationships and customized financial plans.

Well-Informed, Knowledgeable Clients

The average client base at Stonegate Wealth Management stems from individuals, families, and corporate retirement plans with “[considerable investment assets](#).”

Detailed Approach to Research

For this NJ wealth management firm, research is a key component to the success of the client and of the firm.

As one of the top financial advisors in NJ, all their planning strategies and investment methodologies are based on extensive, up-to-date research.



Fiduciary Standard & Fee-Only Services

It isn't easy to find a financial planner in NJ that you fully trust to responsibly manage your finances.

While part of establishing trust comes from creating a positive relationship between clients and advisors, it also comes as a natural by-product of fiduciary responsibility.

As such, Stonegate Wealth Management abides by a [fiduciary standard](#), meaning that these financial advisors in NJ are committed to disclosing fees and acting in their client's best interests.

[According to fiduciary standards](#), this commitment also means that this best financial advisor in New Jersey is also committed to:

- Providing full and fair disclosure of all important facts
- Fully disclosing any potential conflicts of interest

Fee-Only

Closely related to the fiduciary standard is Stonegate Wealth Management's commitment to offering [fee-only](#) comprehensive wealth management.

Clients can rest assured that this best financial advisor in New Jersey maintains fee-only practices and philosophies, meaning that the firm does not receive commissions, kickbacks, or incentives for any financial products.

With fee-only management, clients can rest assured that they are receiving transparent, unbiased advice, as the firm's success is defined by each client's individual success.

In-Depth Financial Planning

As one of the best financial advisor in New Jersey, Stonegate Wealth Management employs an in-depth financial planning process to ensure that each client receives a customized plan.

The process is also a collaborative and personalized one, as it may require [3-5 meetings](#) between an advisor and their client. Their approach to financial planning involves the following steps:

- Data Gathering and Goal Identification
- Preliminary Results Review
- Plan Presentation
- Plan Implementation
- Revision

Investment Management Approach

As a top NJ wealth management firm, helping clients with their investment portfolios is an important part of what Stonegate Wealth Management offers. On a fundamental level, their [investment approach](#) includes:

- Implementing Modern Portfolio Theory to efficiently diversify assets
- Using 10-13 asset classes to minimize risk
- Favoring index funds and ETFs

To build upon this foundation, this best financial advisor in New Jersey utilizes sophisticated software for portfolio monitoring, rebalancing, and enhancing tax efficiency.

Portfolios managed with Stonegate Wealth Management are meant to be living documents, meaning that financial plans can be revised and renewed to match fluctuating life circumstances.

As an additional benefit, clients can expect to receive detailed performance reports each quarter, promoting transparency between client and advisor.

Conclusion: Choosing the Best Financial Advisor in New Jersey for You

Finding a good financial advisor in New Jersey can place you on the path towards financial security, making financial advisors in NJ essential to successful wealth management and financial planning.



Whether you're looking to begin a retirement fund, save for college, set aside money for your children, or simply learn how to better manage your money, there are plenty of great financial advisors in NJ to choose from.

Before selecting a financial planner in NJ or partnering with an NJ wealth management firm, take the time to evaluate and define your personal financial goals.

By keeping your unique financial needs and goals in mind, you'll be well-equipped to identify the best financial advisor in New Jersey for you.

Image sources:

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