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# **Top 10 Best Financial Advisors & Wealth Managers in Minneapolis, MS | 2018 Ranking**

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## **RANKING & REVIEWS BEST FINANCIAL ADVISORS IN MINNESOTA**

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### **Intro: 2018 Ranking of the Top Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota)**

Working with the right wealth manager, investment advisor, or financial planner in Minneapolis, St. Paul, Edina, or any other city in Minnesota, has become all the more important over the past several years.

Market volatility, an uncertain global economy, and a recovering U.S. economy make seeking professional advice about financial planning and portfolio management vital.

Because of the diverse range of services clients require and the broad spectrum of financial strategies available, it has become increasingly challenging to identify financial planners in Minneapolis who fit the bill perfectly.

Of course, not everyone has the time—or the resources—to dedicate hours of research towards finding the top Minnesota financial advisors.

That's where AdvisoryHQ comes in. We have provided a review of some of the top financial advisors in the Minnesota area to help you find the guidance and direction you need.



*Award Emblem: Top 10 Best Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota)*

## **Top 10 Best Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota) | Brief Comparison**

<b>Best Financial Advisors in Minnesota</b>	<b>Highlighted Features</b>	<b>Ratings</b>
Aurochs Financial Group	Tailored services for women going through life transitions	5
Birchwood Financial Partners	Exceptions for minimum investment	5
Cahill Financial Advisors Inc.	Employer Retirement Account Integration	5
FFP Wealth Management	Tax Super Sheet™	5
Flourish Wealth Management	Wealth Management for Women	5

Pitzl Financial	Your Personal Boardroom™	5
PrairieView Partners	Integrated Planning Strategy	5
White Oaks Wealth Advisors	A la carte pricing options	5
Financial Designs	CeFT™ certification to guide clients through life transitions	3
SilverOak Wealth Management	Registered Investment Advisors	3

Table: Top 10 Best Financial Advisors in Minnesota | Above list is sorted by rating

## Fee-Based vs Fee-Only Financial Planners in Minnesota

When it comes to evaluating local financial advisors in Minnesota, there are typically two types of firms to consider: fee-only and fee-based advisors.

How do you know which type of Minnesota financial advisor is right for you? Below, we'll provide you with a brief overview of everything you need to know about the differences between fee-only and fee-based Minnesota financial advisors.

### Fee-Only Pricing Structure

When an investment firm or a financial advisor in Minnesota says that they are "fee-only," this means that they *do not* accept commissions or third-party referral payments.

Because an advisor's only source of income comes from the client, a fee-only pricing structure minimizes the inherent conflicts of interest that come along with recommending and selling investment products.

In short, a fee-only financial planner in Minnesota is in a better position to act solely in the interest of their clients.

### Fee-Based Pricing Structure

Fee-based firms will receive *some* direct compensation from clients, but are free to accept commissions from the companies who provide their financial products.

While a fee-based structure does create some potential conflict, many fee-based investment firms are also fiduciaries, which often counteracts the potential for conflict.

As a fiduciary, a financial advisor or firm in Minnesota is legally responsible to fully disclose any conflicts of interest and are required to put the interests of their clients ahead of their own.

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## AdvisoryHQ's Selection Methodology

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

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

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## Detailed Review – Top Ranking Wealth Management Firms in Minneapolis

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

Click on any of the names below to go directly to the review section for that firm.

- [Aurochs Financial Group](#)
- [Birchwood Financial Partners](#)
- [Cahill Financial Advisors, Inc.](#)
- [FFP Wealth Mangement](#)
- [Financial Designs](#)
- [Flourish Wealth Management](#)
- [Pitzl Financial](#)
- [PrairieView Partners](#)
- [SilverOak Wealth Management LLC](#)
- [White Oaks Wealth Advisors](#)

Click below for previous years' rankings:

- 2016 Ranking: [Top 10 Best Financial Advisors in Minneapolis](#)
- 2017 Ranking: [Top 9 Best Financial Advisors in Minneapolis](#)

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## Aurochs Financial Group Review

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Based in Wayzata, [Aurochs Financial Group](#) is a Minneapolis wealth management firm that provides [fee-only](#) wealth management services for clients with \$1 million-\$10 million in assets.

As a top Minneapolis financial advisor, clients of Aurochs Financial Group can benefit from sophisticated wealth management, personalized service, and a disciplined approach to support long-term investment returns.

### **Key Factors That Enabled Aurochs Financial Group to Rank as a Top Wealth Management Firm in Minneapolis**

The following factors enabled Aurochs Financial Group to be included in this review of wealth management firms in Minneapolis.

#### **Unique Client Focus**

Part of what makes Aurochs Financial Group stand out among competing wealth management firms in Minneapolis is their boutique focus on serving a unique, specific set of clients.

Aurochs specializes in helping successful couples looking for financial independence near retirement, and women in transition, like divorce, career change, retirement, inheritance, and widows.

They also provide a quick overview of their ideal client to help potential clients determine whether they these Minnesota financial advisors will be a good fit.

Uniquely, this includes a [Net Worth Personality Type quiz](#), where potential clients can identify whether their attitudes towards wealth and investments match that of Aurochs Financial Group.

#### **Diverse Services**

Along with serving a unique set of clients, these Minnesota financial advisors also offer a diverse range of expert financial services, detailed below.

- [Ongoing Wealth Management](#)—Includes Financial Planning, Investment Management, Tax Planning, Estate Planning, Charity Planning, and Risk/Insurance Planning
- [Managing Life's Transitions](#)—Provides specialized training and care to guide clients through major life changes and transitions
- [Widow Services and Financial Direction](#)—Expertly and carefully addresses immediate and future financial worries while allowing space to grieve
- [Comprehensive Financial Plan](#)—Covers a wide range of financial and investment topics, including education savings, investments, insurance, and more

Potential clients can take advantage of a complimentary Second Opinion Service to either confirm that their current plans are on track, become a Minnesota wealth management client with Aurochs, or receive suggestions for improvement.



### *Best Financial Advisors in Minnesota*

#### **Rating Summary**

With expert Minnesota wealth management services and a keen focus on serving a specific client base, Aurochs Financial Group provides deep value to couples preparing for retirement and women in transition.

Although the advisory team at Aurochs is small, their capabilities are expansive, earning the firm a 5-star rating overall.

Along with retirees and women, these Minnesota financial advisors also serve physicians and business owners as Certified Financial Planners™ and Certified Financial Transitionists®, casting a wide net of valuable financial management services.

***See Also: Top Financial Advisors in Wisconsin (Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon)***

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## Birchwood Financial Partners Review

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Founded in 1990, [Birchwood Financial Partners](#) is a [fee-only](#) wealth management firm in Minnesota located in Edina, a suburb right outside of Minneapolis.

As a top Minneapolis wealth management firm, Birchwood seeks to improve each client's quality of life by understanding unique financial situations in relation to their lifestyle, goals, and ambitions.

### **Key Factors That Enabled Birchwood Financial Partners to Rank as a Top Wealth Management Firm in Minneapolis**

The following factors enabled Birchwood Financial Partners to be included in this review of wealth management firms in Minneapolis.

#### **Wide Range of Services**

This Minneapolis wealth management firm and its advisors bring together a diverse set of experiences and skills to deliver a wide range of services to its clients, including:

- Sustainable, Responsible, Impact Investing—The Minneapolis financial advisors at Birchwood can help you identify areas of your portfolio that are best suited for value-based investing
- Legacy Planning—Helps clients work with their estate attorney to create a plan for asset distribution
- Investment Management—Focuses on long-term strategies and balancing risk with portfolio growth
- Retirement Planning—Sessions designed to uncover financial goals and explore options for sustainable income

- Cash Flow and Budgeting—Helps clients adopt an organized, goal-oriented approach to their finances
- Tax Planning—These Minnesota financial advisors will work closely with tax professionals and accountants to find the best possible tax solutions
- Insurance Review—Helps clients identify any weaknesses in their existing coverage
- Charitable Giving Strategies—Assists clients with finding flexible, tax-advantaged ways to make charitable donations
- Education Planning—Balances personal and educational goals for parents and children



*Best Financial Planners in Minneapolis*

**Talented, Diverse Team**



Birchwood employs a diverse team of Minnesota financial advisors, with qualifications including Certified Financial Planner™, Chartered Advisor in Philanthropy®, and Chartered Financial Analyst.

Individual members of the team have enjoyed various awards and accolades, and nearly all maintain local and professional affiliations.

Uniquely, the majority of Minneapolis financial advisors and support staff employed at Birchwood are women, marking a stark contrast against the financial advisory industry. 8 out of 11 team members are women, with one being co-founder Kay Kramer.

In an industry where women are notoriously under-represented, Birchwood successfully maintains a clear commitment to keeping a diverse, talented team of Minnesota financial advisors.

### **Rating Summary**

As a fee-only firm with a diverse, talented team and a client-first focus, Birchwood Financial Partners has earned a spot among the top-rated financial advisors in Minnesota.

Our review found the large percentage of female advisors particularly notable, particularly as global themes of gender diversity in financial services continue to spark in-depth research and conversation.

With a dedication to diversity, a wide range of services, and plenty of accreditation to validate the team's collective experience, Birchwood receives a 5-star rating as a top Minnesota financial advisor to partner with this year.

***Don't Miss: Best Financial Advisors in Indianapolis, Indiana***

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## **Cahill Financial Advisors, Inc. Review**

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[Cahill Financial Advisors, Inc.](#) was established in 1980 as a fee-only, fiduciary Minnesota financial advisor, serving the Minneapolis area ever since its inception.

After spending over three decades in Edina, these Minnesota financial planners think of their clients as neighbors, working to be a trusted partner in helping their clients achieve their financial goals.

**Key Factors That Enabled Cahill Financial Advisors to Rank as a Top Wealth Management Firm in Minneapolis**

The following factors enabled Cahill Financial Advisors, Inc. to be included in this review of wealth management firms in Minneapolis.

### **Fee-Only Advisory Services**

Cahill Financial Advisors is a [fee-only](#) wealth management firm in Minneapolis. This means that they do not earn commissions, referral fees, or incentives for the sale of any products.

Additionally, all advisement or investment management fees charged by this wealth management firm in Minneapolis are fully disclosed in the firm's [ADV Part 2A](#), supporting the firm's commitment to transparency.



### *Fee Only Financial Planner in Minnesota*

### **Asset Management**

Asset management is one of the most important parts of financial planning, ensuring that you can meet lifestyle, education, retirement, and philanthropic goals.

As a top wealth management firm in Minnesota, Cahill Financial Advisors provides the following asset management guidance and services:

- Goal oriented investment policy statements
- Strategic & tactical asset allocation
- Risk management & diversification
- Tax considerations

- Employer retirement account integration
- Independent research

Potential clients who are interested in learning more about these Minneapolis wealth management services can sit down with a financial advisor for an initial, no obligation consultation.

### **Rating Summary**

With a client-centric philosophy, a fee-only structure, and a fiduciary commitment to always act in their clients' best interests, Cahill Investment Advisors is a competitive force among Minneapolis financial advisors.

Additionally, clients can also benefit from a diverse and talented team of Minneapolis financial advisors, collectively contributing a wide range of strengths, talents, and professional designations and solidifying Cahill's 5-star rating.

***Related: Top Financial Advisors in Chicago, Illinois (Ranking)***

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## **FFP Wealth Management Review**

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[FFP Wealth Management](#) is a Minneapolis financial advisory firm that offers a staggering array of services.

Along with providing everything from investing to will preparation, this wealth management firm in Minneapolis offers educational seminars for folks interested in learning more about financial planning.

As a Registered Investment Advisor and a member of the [Fee-Only Network](#), FFP Wealth Management is a fee-only financial planner in Minnesota.

### **Key Factors That Enabled FFP Wealth Management to Rank as a Top Wealth Management Firm in Minneapolis**

The following factors enabled FFP Wealth Management to be included in this review of wealth management firms in Minneapolis.

#### **Tax Super Sheet™**

Without proper planning and strategic investment management from a Minneapolis financial advisor, you could be hit with serious tax implications in the future.

One way the team at FFP Wealth Management strives to help clients is by providing a proprietary tool known as the [Tax Super Sheet™](#).

This planning tool allows these financial advisors in Minneapolis to easily illustrate the tax implications of any investment choices, answering questions like:

- Should a major purchase be financed or paid in cash?
- Do I really benefit from a tax-free bond?
- How can I pay for my child's tuition while also saving for retirement?
- What is most probable tax rate at retirement?
- How can I receive more benefits from my charitable giving?
- Do tax referrals save or cost me money?
- How can I limit potential errors made by my heirs that could put most of their inheritance in the hands of the IRS?

## Retirement Planning

This wealth management firm in Minneapolis recognizes that most Americans are looking for standardized, one-size-fits-all financial advice.

Unfortunately, it rarely works out this way. Each financial situation is different, which means that each course of action will be equally as different.

The good news is that FFP Wealth Management offers retirement advice and planning including advice about 401(k) plans, IRAs, rollovers, and more, helping to answer [retirement planning questions](#) like:

- How much should I invest in my retirement plans?
- Should I keep my 401(k) or move my funds to an IRA?
- What are the new rules for advisor firms that manage retirement plans?

The screenshot displays the FFP Wealth Management website. The header includes the company logo and navigation links for Home, Team, Services, Media, and Contact. The main content area is a grid of service tiles, each with an icon, a title, a brief description, and a 'Read More' link. The services listed are:

- WILL/TRUST**: We will help you to get all the family affairs in order. Where its a will, trust fund and more. [Read More >](#)
- POA/HCD**: We can help you to start from scratch or step in into existing financial management. [Read More >](#)
- ROLLOVER IRA/401K**: We can help if you lost your job/got fired or in the process of changing jobs. [Read More >](#)
- INHERITING**: We can help with inheriting property or finances without large tax burden. [Read More >](#)
- ANNUITY**: We can help with buying or getting out of business or property. [Read More >](#)
- EMPLOYER**: We can help with your questions about 401K or Health Insurance. [Read More >](#)
- TAX PLANNING & PREPARATION**: We can help with your questions about Tax Planning & Preparation. [Read More >](#)
- RETIREMENT**: We can help with your questions about Retirement & more. [Read More >](#)
- INVESTING**: We can help with your questions about Investing. [Read More >](#)

## *Fee Only Financial Planner in Minnesota*

### **Rating Summary**

As one of the top financial advisors in Minneapolis, FFP Wealth Management provides a wide range of services and a fee-only pricing structure, making it easy for potential clients to evaluate whether FFP is right for them.

This Minneapolis financial advisor excels at providing expert financial services and customized tools to keep clients organized, focused, and positioned for success, earning FFP Wealth Management a 5-star rating overall.

***Popular Article: Top Financial Advisors and Wealth Managers in Los Angeles, California***

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## **Financial Designs Review**

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Founded in 1992, [Financial Designs](#) has over two decades of experience as a fee-only Minneapolis financial advisor.

Through a range of proprietary services and industry credentials, Financial Designs promises to help clients experience “more peaks and fewer valleys,” empowering their clients with more confidence, more money, and ultimately, more time to enjoy their life.

### **Key Factors That Enabled Financial Designs to Rank as a Top Wealth Management Firm in Minneapolis**

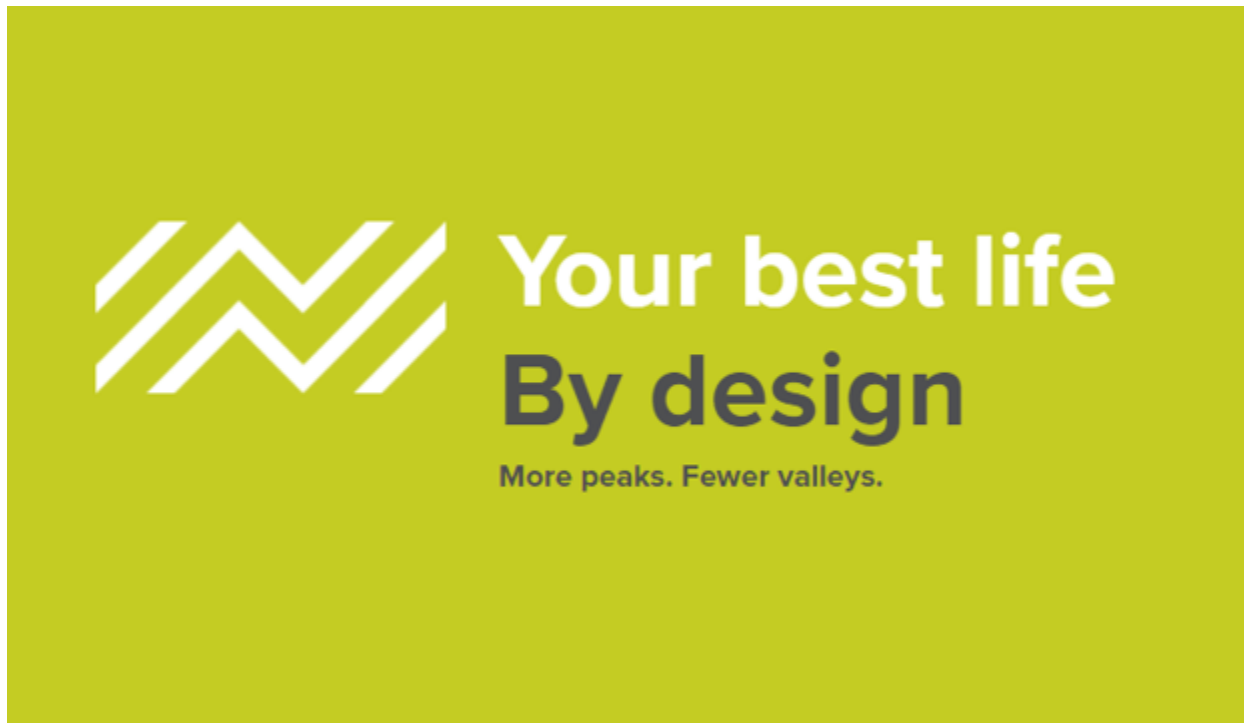
The following characteristics enabled Financial Designs to be ranked as one of the top Minneapolis financial advisory firms.

#### **Pioneer in Life Planning**

Wealth management services are consistently evolving and changing, adapting more holistic views on the financial planning process. As a result, many of the top financial planners in Minneapolis are beginning to seek new certifications and designations to better serve their clients.

In 2016, founder [Laurie Laner](#) became the first Minneapolis financial advisor to also become a Certified Financial Transitionist (CeFT™), marking an important industry shift towards a more holistic, life-oriented financial planning process.

This designation utilizes cutting-edge research from neuroscience, physiology, sociology, and psychology to assist clients with transitions like retirement, divorce, widowhood, and more.



*Best Minnesota Financial Advisors*

**Woman-Owned & Operated Firm**

Although women are historically under-represented in the financial industry, Financial Designs is proof that the tides are changing.

This top Minneapolis financial advisory firm is wholly woman-owned and operated under the management of founder and president Laurie Laner, supported by vice president Judy Bills.

Both women have decades of financial planning experience, strong industry ties, and community involvement, maintaining Financial Designs as one of the top Minneapolis financial advisors.

In particular, founder and president Laurie Laner provides an extensive range of industry recognition and experience, including (but not limited to):

- Member of NAPFA & FPA
- Monthly columnist for Women's Business Minnesota Magazine
- Regular contributor to financial media outlets like USA Today, Minnesota Public Radio, Minneapolis Star Tribune, and more

- Adjunct professor at the University of Minnesota for CFP® training
- Named a top wealth manager in 2016, 2015, 2014, 2012, and 2011

## **Rating Summary**

As a top Minnesota financial advisor, Financial Designs provides clients with intuitive, comprehensive services built to not only address basic finances, but also the psychology behind each financial goal and motivation.

While the firm is certainly ahead of the industry in terms of successful female leadership, qualifications, fee transparency, and a user-friendly website, Financial Designs is slightly behind in terms of providing case studies or specific examples of each service in action.

Without these, potential clients may find it difficult to fully evaluate their Minnesota wealth management services and capabilities, earning the firm a 3-star rating overall.

***Read More: Best Financial Advisors in D.C., Maryland, and Virginia (Tri-State)***

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## **Flourish Wealth Management Review**

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[Flourish Wealth Management](#) is an Edina-based wealth management firm in Minneapolis.

The firm's primary objective is to provide a holistic planning environment, where advisors can deliver personalized solutions by aligning each client's financial resources with their goals and values.

Operating as a registered investment advisory firm for clients in Minneapolis and nearby suburbs, Flourish Wealth Management delivers wealth management and investment advisory services primarily to individuals and families.

### **Key Factors That Enabled Flourish Wealth Management to Rank as a Top Wealth Management Firm in Minneapolis**

The following characteristics enabled Flourish Wealth Management to be ranked as one of the top Minneapolis financial advisory firms.

#### **Independent, Fee-Only Advisor**

Flourish Wealth Management is an independent, [fee-only](#) wealth management firm in Minneapolis and nearby suburbs.

As such, the firm's advisors do not receive referral fees, commissions, or other forms of compensation from third-parties, which lets the company independently evaluate the merits of products and services it recommends to its clients.

As an SEC-registered investment advisory firm in Minneapolis, Flourish Wealth Management acts as an investment fiduciary to its clients. This puts a binding legal responsibility on the firm and its advisors to always act in the best interest of clients.



*Best Financial Planners in Minneapolis*

## **Women's Wealth Management Needs**

As one of the best financial planners in Minneapolis, Flourish Wealth Management offers a unique set of investment and wealth management and advisory services that focuses on the needs of female clients.

From women in transition (separations, divorce, loss of a loved one), to female executives and independent business owners, Flourish Wealth Management has built its advisory capabilities to address distinctive financial needs of women.

Some of the unique financial challenges faced by women include:



- Women earning less over their lifetime due to wage disparity
- Taking time away from work to care for children or aging parents
- Women have longer life expectancies, making planning for retirement challenging in comparison with men

### **Rating Summary**

Flourish Wealth Management is a great resource for clients that prefer a boutique, in-depth, and personalized approach to financial planning and wealth management.

What makes these financial advisors in Minnesota particularly compelling is their focus on providing women's wealth management services, acknowledging that wealthy and professional women have entirely unique financial concerns and challenges.

With over two decades of experience, Flourish Wealth Management brings a wealth of industry experience and an innovative approach, earning the firm a full 5-star rating among the best financial advisors in Minneapolis.

***Related: Top Financial Advisors in Oklahoma City & Tulsa, Oklahoma***

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## **Pitzl Financial Review**

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Located in St. Paul-Minneapolis, [Pitzl Financial](#) is a wealth manager and financial advisor in Minnesota that believes in blending objective planning with management discipline to help clients preserve, protect, and enhance their wealth through various stages of their lives.

While operating as an independent wealth advisory firm, Pitzl Financial is part of the BAM Alliance, a network of like-minded, independent advisors who collectively manage over \$26 billion in client assets.

This alliance enables Pitzl clients to benefit from a wealth of synergies which result in evidence-based, holistic, and transparent advice.

### **Key Factors That Enabled Pitzl Financial to Rank as a Top Wealth Management Firm in Minnesota**

The following key considerations allowed Pitzl Financial to make it into our list of top wealth management firms in Minnesota.

#### **Fee-Only & Fiduciary**

As a [fee-only](#) investment manager and financial planner, the company holds itself fully accountable to its clients for fees charged to them. The firm does not sell any products, nor does it receive any referral fees from other professionals.

As a top-rated wealth management firm, Pitzl Financial acts as a fiduciary for its clients.

This means the advice rendered by the firm and its team of advisors is always in the best interest of the client, without any conflict of interest or personal gain by any other parties.

## **Client Commitments**

Closely related to their duties as a fee-only financial planner in Minneapolis is Pitzl Financial's list of commitments that they make to each client. These include:

- Treating assets, personal information, and values with the same care as they would their own
- Complete transparency with fees
- Acting with integrity and honesty
- Bringing clarity, order, and coordination to their clients' lives
- Respecting each client's unique life experiences, values, and opinions
- Providing unparalleled customer service
- Constantly increasing their industry knowledge and expertise

For potential clients, these commitments provide a significant advantage, as they help increase transparency and demonstrate the foundational values and principles upon which Pitzl Financial bases their financial services.



## *Minneapolis Financial Advisor*

### **Rating Summary**

As one of the top financial advisors in Minnesota, Pitzl Financial believes that achieving life-long goals should be the central focus of financial decision-making.

They also take a unique, corporate board-like approach to governing and managing their clients' wealth through [Your Personal Boardroom™](#), empowering clients to consider themselves as CEOs or Chairpersons.

With a strong focus on developing the client-advisor relationship and empowering clients to take control over their finances, Pitzl Financial earns a 5-star rating among the best Minnesota financial advisors.

***Don't Miss: Best Financial Advisors in Iowa (Des Moines, Ames, Dubuque, and Davenport)***

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## **PrairieView Partners Review**

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Founded in 2007, [PrairieView Partners](#) is a top-rated financial advisor in the St. Paul area, dedicated to delivering superior, highly-integrated wealth planning services to its clients.

As a well-regarded wealth management firm in St. Paul, the company's service delivery revolves around core values of Competence, Objectivity and Integrity. This core philosophy guides each of the firm's interactions with its clients.

### **Key Factors That Enabled PrairieView Partners to Rank as a Top Wealth Management Firm in Minnesota**

The following factors influenced our decision to include PrairieView Partners as one of the top wealth management firms in Minnesota.

#### **Fee-Only & Fiduciary Responsibility**

PrairieView Partners is legally and professionally bound to act as fiduciaries to its clients. Therefore, all recommendations and advice provided must be solely in the interest of the client, with no conflict of interest whatsoever.

This wealth management firm in Minnesota is [fee-only](#), meaning that they do not receive fees or commissions for selling investments or insurance products.

The fees charged are based on a percentage of the value of the portfolio being managed, with a minimum annual fee agreed upon based on the level of service required.

### **Integrated Strategy**

Unlike many other financial advisors in St. Paul and broader Minneapolis area, PrairieView's business model is based on an integrated approach to financial planning.

Using this strategy, expertise from a multi-disciplined team of lawyers, accountants, tax specialists, insurance experts and stock brokers is drawn upon to deliver both "big picture" and detailed advice to clients.



### *Best Minneapolis Financial Advisors*

### **Broad Range of Professional Services**

PrairieView provides its clients a broad array of professional services, including:

- Retirement planning
- Portfolio management
- Estate planning
- Tax planning
- Trust & estate administration
- Stock option compensation

- Risk management
- Charitable planning

This allows clients to receive comprehensive financial planning and wealth management solutions under one window.

### **Rating Summary**

As a Registered Investment Advisor, PrairieView Partners is regulated by the SEC and is required to provide a higher standard of service than non-RIA firms.

With a fiduciary commitment, a fee-only pricing structure, and a broad range of expert financial services, PrairieView Partners is one of the best financial advisors in Minnesota to consider partnering with this year.

***Popular Article: Top Financial Advisors in San Antonio and New Braunfels, Texas***

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## **SilverOak Wealth Management LLC Review**

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Based in Edina, [SilverOak Wealth Management](#) is an independent, fee-only boutique wealth manager in the Minneapolis/St. Paul area with a goal to help clients successfully achieve their business, financial, and personal goals.

Working with a highly qualified, experienced, and multi-disciplinary team, the firm brings over 50 years of combined financial experience to every client engagement.

### **Key Factors That Enabled SilverOak to Rank as a Top Wealth Management Firm in Minneapolis**

The following factors enabled SilverOak Wealth Management LLC to be included as one of the top wealth management firms in Minneapolis.

#### **Fee-Only Advisor & RIA**

SilverOak is a [fee-only](#) wealth manager and financial planner in Minneapolis. The company operates independent of any other service providers and does not sell any third-party product or service to its clients.

As an RIA, SilverOak and its advisory team are legally and professionally bound to offer conflict-of-interest free advice to their clients.

This means that all advice delivered by this Minneapolis wealth management firm must always put the clients' interest before anything else - even before the firm and its individual advisors.

This fiduciary responsibility also fosters greater trust in the advisor-client relationship.

### **Industry Recognition**

As one of the top financial advisors in Minneapolis and St. Paul, SilverOak has received numerous awards and recognitions from leading financial publications, including *CNBC*, *Wealth Manager*, *Five Star*, *Financial Advisor* (FA) and the *Minneapolis/St. Paul Business Journal*.

Some of these top Minneapolis wealth manager accolades include:

- Being ranked #8 on CNBC's 2014 Digital Inaugural list of the Top 100 Fee-Only Wealth Management Firms
- Recognized as one of *Wealth Manager's* "Top Wealth Managers" in the July/August 2009, 2010 and 2011 issues
- Listed in *FA's* 2011 RIA Ranking
- Named in the *Minneapolis/St. Paul Business Journal* as a "Top Wealth Manager" in 2011

Individual advisors on the SilverOak team have proved their credentials as top wealth managers in Minneapolis by earning the coveted Five Star Professional award multiple times, from 2012 to 2015 consecutively.

### **Rating Summary**

As a top wealth management firm in Minneapolis and St. Paul, SilverOak seeks to align current opportunities with the endless possibilities of tomorrow.

With a fee-only pricing structure and a strong history of industry recognition, SilverOak is a dynamic option for anyone looking for financial advisement.

While SilverOak Wealth Management provides competitive financial services and investment management strategies, their website is outdated and less user-friendly than that of competing Minnesota financial advisors, earning the firm a 3-star rating overall.

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## **White Oaks Wealth Advisors Review**

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[White Oaks Wealth Advisors, Inc.](#), an independent financial advisor in Minneapolis and Florida, was founded by financial industry veteran Robert Klosterman, CFP®.

As a [fee-only](#) Minnesota financial advisor, White Oaks Wealth Advisors is focused on providing financial planning and wealth management services to a select group of clients: high net-worth and ultra-high net-worth individuals and families.

## **Key Factors That Enabled White Oaks Wealth Advisors to Rank as a Top Wealth Management Firm in Minnesota**

See below for an overview of the factors that helped White Oaks Wealth Advisors to be ranked as one of this year's top wealth management firms in Minnesota.

### **A La Carte Pricing Options**

As a top-ranked Minneapolis wealth management firm, White Oaks offers its clients a wide range of pricing models to choose from.

Rather than pay for services that they don't need or won't use, clients can select the services they require from an [a la carte menu](#) with exact prices, fees, and percentages, making it easy for clients to know exactly what each service will cost them up-front. These service options include:

- Financial Planning Project with Ongoing Investment Management
- Financial Planning Project Only
- Wealth Management Retainer for Services
- Family Office Services
- Strategic Minimalist™
- Mindful Traditionalist™
- Mindful Progressive™ Pooled Funds

Non-investment services can be priced hourly, by project, or with a retainer, allowing a wide range of flexibility.



### *Best Minneapolis Financial Advisors*

#### **Professional Recognition**

White Oaks has been recognized as one of the top-ranking wealth management firms in Minneapolis through individual and company-wide awards and accolades, including from some of the most respected sources in the financial industry. Some of these recognitions include:

- Listed as one of the Top 250 Financial Advisors in the United States by *Worth Magazine*
- Recognition as one of the top 150 Financial Advisors by *Mutual Fund* magazine, *Medical Economics* and *Bloomberg's Wealth Manager* magazine.
- Listed in CNBC's chart of the Top 100 fee-only wealth management firms

As a Minneapolis wealth manager whose views and opinions are well regarded in the industry, Mr. Klosterman is frequently quoted and published in mainstream financial media, including *CFP Today*, *The New York Times*, *USA Today*, *Minneapolis Star Tribune*, *Barron's* and *Fortune*.

#### **Rating Summary**

Like its predecessor firm, R.J. Klosterman & Co, Inc., White Oaks has a clear vision to provide clients with independent, expert financial planning and wealth management advisory services.

Many new clients join White Oaks through referrals from existing clients and other industry professionals, validating the company's standing as one of the top-ranked wealth managers in Minneapolis.



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## **Conclusion – Top 10 Wealth Management Firms in Minnesota**

The above list of investment advisors, wealth managers, and financial planners in Minneapolis, St. Paul, Edina, and other cities within Minnesota is by no means exhaustive.

Your investment or financial needs and goals will be unique to your financial situation, meaning that your idea of the best Minnesota financial advisor could differ greatly from that of the next person.

No matter what type of financial services and support you need, the resources offered here provide a great start in your search for the perfect financial advisor in Minneapolis that can meet, and even exceed, your financial planning needs.

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## **Rate Table Disclaimer**

Click here to read AdvisoryHQ's [disclaimer on the rate table\(s\) displayed](#) on this page.

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Image sources:

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