
10 Best Financial Advisors & Wealth Management Firms in Pittsburgh, PA | 2018 Ranking

RANKING & REVIEWS BEST FINANCIAL ADVISORS IN PITTSBURGH

2018 Ranking of the Top Financial Advisors in Pittsburgh, PA

Hiring any old financial advisor in Pittsburgh is not difficult—but finding the top financial planner in Pittsburgh is. After working hard to build up your wealth, you need to be able to trust the professional who will be managing and growing your money.

When you begin looking for a financial advisor in and around Pittsburgh, you will find hundreds upon hundreds of options, and to even begin the selection process is endlessly time consuming.

To answer the many questions that residents may have regarding the best financial advisors in Pittsburgh, we have conducted a detailed analysis of advisors and wealth management firms across the city, and we have published our findings below.



Award Emblem: Top 10 Best Financial Advisors in Pittsburgh, Pennsylvania

Top 10 Best Financial Advisors in Pittsburgh, Pennsylvania | Brief Comparison & Ranking

Best Financial Advisors in Pittsburgh	Highlighted Features	Ratings
Allegheny Financial Group	Comprehensive, step-by-step financial planning	5
Aufman Associates Inc.	Fee-only fiduciary	5
Bill Few Associates, Inc.	Professional investment management & detailed strategies	5

D.B. Root & Company	Life Plan 20/20® & Strategic AIM™ processes	5
Fragasso Financial Advisors	In-house portfolio management team	5
Hefren-Tillotson	MASTERPLAN Approach	5
PWA Wealth Management	Independent firm with a fiduciary commitment	5
Waldron Private Wealth	Boutique approach for individuals, families, & family offices	5
BPU Investment Management	Financial education for corporations & organizations	3
McMahon Financial Advisors	Dual portfolio process	3

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

How to Find the Best Pittsburgh Financial Planners

When it comes to choosing the best wealth management firms in Pittsburgh, there are plenty of firms to choose from. With so many options to consider, how can you narrow the search?

First, take a close look at what each financial advisor in Pittsburgh has to offer, and match those services up with your own personal financial goals.

Are you planning for retirement? Have you recently changed jobs? Do you have a recent inheritance or an impending divorce that will affect your financial future?

As you will see in the following reviews for financial advisors in Pittsburgh, each firm specializes in varying areas of financial planning and wealth management.

If your needs are of a broader nature and you wish to have peace of mind through simple yet comprehensive financial planning, you may be well-suited with a financial advisor in Pittsburgh that offers a broader range of services.

Once you've narrowed down your choices to a select few of these top-ranking wealth management firms in Pittsburgh, see if any of your selected advisors offers an introductory consultation session.

Whether it's a free or paid consultation, this can be a good way to "feel out" any prospective Pittsburgh financial advisors before committing to their services.



Best Wealth Management in Pittsburgh

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 – Best Wealth Management Firms in Pittsburgh

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

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

- [Allegheny Financial Group](#)
- [Aufman Associates Inc.](#)

- [Bill Few Associates, Inc.](#)
- [BPU Investment Management, Inc.](#)
- [D.B. Root & Company](#)
- [Fragasso Financial Advisors](#)
- [Hefren-Tillotson](#)
- [McMahon Financial Advisors, LLC](#)
- [PWA Wealth Management](#)
- [Waldron Private Wealth](#)

Click below for previous years' rankings.

- **2016 Ranking:** [Top 11 Best Financial Advisors in Pittsburgh](#)
- **2017 Ranking:** [Top 10 Best Financial Advisors in Pittsburgh](#)

Allegheny Financial Group Review

[Allegheny Financial Group](#) is a [fee-based](#), SEC-registered financial advisor headquartered in Pittsburgh, Pennsylvania. They offer financial planning, portfolio and risk management, market analysis, and business and estate planning to households, businesses, and non-profits.

Allegheny Financial Group has been selected as a top financial advisor in Pittsburgh for their dedication to independence and wide range of expert financial services.

Key Factors That Enabled Allegheny Financial Group to Rank as a Top Pittsburgh Wealth Management Firm

Complete Financial Planning

A comprehensive financial plan designed by a Pittsburgh financial planner puts you in control of your future, allows you to maximize your asset retention, and remains flexible to meet ever-changing financial needs.

Allegheny Financial Group adheres to the following objectives when creating a personal financial plan:

- **Evaluate:** Your team of Pittsburgh financial advisors will help you achieve your financial goals through education, risk management, and retirement and estate planning.
- **Set Objectives:** Set clear and measurable financial goals.

- **Develop Your Plan:** How will you reach your financial objectives?
- **Put Your Plan Into Action:** By now, a clear and concise plan has been established and your financial advisor will put this plan into action.
- **Monitor Your Plan's Progress:** Regular monitoring and evaluation improve the success of your financial plan, adapting investments as needed.

Managing Your Investments

Whether you are looking to grow your assets or minimize taxes, properly managed investments are the cornerstone of financial health. Allegheny Financial Group focuses on four main investment components:

- **Asset Allocation:** Determining the right proportions of risk and return for each category of assets is the first step in investment management.
- **Portfolio Implementation:** Your chosen asset classes are implemented into your portfolio, and careful monitoring ensures you are staying on track with your goals.
- **Original and Proprietary Investment Research:** Allegheny Financial Group conducts their own original research that they share with their clients through easy-to-read reports and quarterly Capital Market Reviews.
- **Asset Management:** These Pittsburgh financial planners utilize organized, effective, and expertly created diligence to take over the critical management of your portfolio.

Rating Summary

For over 40 years, Allegheny Financial Group has thrived on the premise of being an independent, objective, and fee-based financial advisor.

They also provide clients with a wide range of financial planning, investment management, and additional financial services, providing deep value for anyone looking to improve their financial health.

This wide range of services and dedication to independence has earned Allegheny Financial Group an overall 5-star rating as one of the best financial advisors in Pittsburgh to consider partnering with this year.

See Also: Best Financial Advisors in Indianapolis, Indiana

Aufman Associates Inc. Review

Founded in 1983, [Aufman Associates Inc.](#) is an independent, fee-only financial planning firm.

Based out of Sewickley, PA, Aufman Associates offers comprehensive investment management and financial planning for individuals and families throughout Pittsburgh and the surrounding area.

Key Factors That Enabled Aufman Associates Inc. to Rank as One of the Best Financial Advisors in Pittsburgh

Client-Centric Firm Structure

Part of what makes Aufman Associates one of the best financial advisors in Pittsburgh is their dedication to maintaining a structure that benefits clients first and foremost.

For Aufman Associates, the best definition of growth comes from maintaining high levels of service. Rather than focus on building their assets under management, this team of financial advisors in Pittsburgh only takes on new clients after ensuring that the relationship will be a good fit.

The firm's fee-only, fiduciary structure also contributes to their client-centric focus, ensuring that all advice is given without conflicts of interest and with the highest levels of transparency.

Comprehensive Approach

Aufman Associates offers two tiers of service: Investment Management and Financial Planning and Coordination. Investment Management services include:

- Market Research and Analysis
- Investment Policy Development
- Asset Allocation
- Manager Selection and Due Diligence
- Tax Managed/Maximized Net Return
- Implementation, Managing, Monitoring
- Performance Reporting

Conversely, clients that want to take advantage of the firm's Financial Planning and Coordination services can benefit from the following services:

- Tax Filing Coordination, Oversight, and Review
- Estate Planning Management of Structures/Trusts, Gift Programs, Foundations
- Insurance Review/Recommendation
- Executive Benefit Guidance/Oversight
- Cash-Flow Management/Bill Pay Services
- Strategic Planning, Special Planning Areas

Along with providing a wide range of services for wealth management in Pittsburgh, each tier is fully explained, allowing potential clients the opportunity to see the firm's financial philosophies and approach before even walking in the door.



Best Pittsburgh Financial Planners

Rating Summary

With a fee-only approach and a fiduciary commitment, Aufman Associates provides clients with the advantages of trust and transparency.

When partnering with wealth management firms in Pittsburgh, it's important to trust that recommendations are truly made in your best interest, which is certainly something that these financial advisors in Pittsburgh excel at.

The firm's comprehensive services and client-centric approach make Aufman Associates one of the best financial advisors in the Pittsburgh area to consider partnering with this year.

Don't Miss: Top Financial Advisors in Chicago, Illinois (Ranking)

Bill Few Associates, Inc. Review

With two locations in North and South Hills, [Bill Few Associates, Inc.](#) is a [fee-based](#) Pittsburgh financial advisor providing financial planning and investment expertise to a variety of individual and institutional clients.

Bill Few Associates has been chosen for their independence, fiduciary approach, and broad range of custom financial planning and investment management services.

Key Factors That Enabled Bill Few Associates, Inc. to Rank as One of the Best Financial Advisors in Pittsburgh

Professional Investment Management

Most of the services offered by this Pittsburgh wealth management firm are centered around their investment expertise. Clients benefit from the in-depth knowledge of multiple investment management professionals with a great record of success.

The following is an overview of services offered by this wealth management firm in Pittsburgh:

- **Individual Equity Management:** Revolving around a core philosophy of style-neutral, sector-neutral, large capitalization equity portfolios, Bill Few Associates regularly outperform benchmarks.
- **Individual Fixed-Income Management:** A diversified portfolio of fixed-income investments is available for both individual and institutional clients. In combination with winning tax strategies, the firm's emphasis on high credit-quality corporate bonds is proven to perform.
- **Mutual Fund Management:** Bill Few Associates have a history of utilizing proprietary and commercial research systems to select mutual funds that serve clients extremely well.
- **Alternative Investment Management:** Traditional investments can be supplemented through access to hedge funds, Limited Partnerships, and other options strategies.

Company Retirement Planning

To help small and medium-sized businesses develop effective retirement plans, Bill Few Associates offer options such as PSP, 401(k), SEP, SIMPLE Plans, and more.

In addition, each plan comes with expert advice from your Pittsburgh financial advisor and encompasses the following components:

- High-performance company retirement planning
- Regular reviews and updates
- Advisement to comply with the Employee Retirement Income Security Act of 1974 (ERISA)
- Simple and easy-to-understand plans



Best Financial Advisors in Pittsburgh

Rating Summary

For clients that want comprehensive, in-depth investment management services, Bill Few Associates is a great fit.

Not only does the firm provide expert financial strategies, but they also work to integrate common planning services, like education planning and retirement planning.

With a strong commitment to independence and a client-facing approach, Bill Few Associates is one of the top Pittsburgh wealth management firms to consider partnering with this year.

Related: Top Financial Advisors and Wealth Managers in Los Angeles, California

BPU Investment Management, Inc. Review

[BPU Investment Management, Inc.](#) is one of the top wealth management firms in Pittsburgh, striving to provide services that are “professional, yet personal.”

Clients can enjoy a wide-range of wealth management services including asset management, financial planning, retirement planning, and institutional brokerage services.

Although BPU Investment Management is a [fee-based](#) wealth management firm in Pittsburgh, we have included them on this list of the best financial advisors in Pittsburgh for their expert financial services, detailed below.

Key Factors That Enabled BPU Investment Management, Inc. to Rank as a Top Wealth Management Firm in Pittsburgh

Comprehensive Wealth Management for Private Clients

Your Pittsburgh financial advisor will be the one who understands your goals and current life situation.

He or she will act as a liaison between you and BPU’s accredited team of professionals, which include Chartered Financial Analysts (CFAs), Accredited Investment Fiduciary Analysts (AIFAs), and Certified Financial Planners (CFPs).

As a private client, you have access to recommendation for services such as:

- Cash management
- Investments
- Tax planning
- Debt structure
- Retirements plans
- Legacy planning
- Asset protection

Financial Education for Corporations and Organizations

Uniquely, BPU Investments offers personal financial education to employees and members of associations to boost understanding of financial resources.

With a goal to increase financial literacy by motivating employees to improve their financial health, these classes focus on in-classroom learning and practical application.

In turn, this aids in the development of sound financial goals. Classes are taught by experienced and credentialed BPU financial planners in Pittsburgh., and each employee that successfully completes the class is eligible for personal consultation and analysis with the firm.



Best Pittsburgh Financial Advisors

Rating Summary

As a top Pittsburgh financial advisory firm, BPU Investments proudly enjoys the long-lasting relationships they build with their clients. It's this mix of professional and personal attitudes that demonstrates exactly what sets the Pittsburgh financial advisors at BPU Investments apart.

However, it is unclear as to whether the firm maintains a fiduciary commitment, which holds Pittsburgh financial advisors to a high standard of practice, putting client needs and interests first and foremost when recommending financial products.

As a fee-based firm earning additional compensation from investment products and insurance sales, this commitment is crucial to establishing trust.

By taking on a fiduciary commitment, BPU Investment Management could easily improve both their value proposition to incoming clients and their rating as a top financial advisor in Pittsburgh.

Popular Article: Best Financial Advisors in D.C., Maryland, and Virginia (Tri-State)

D.B. Root & Company Review

[D.B. Root & Company](#) is centered right in Pittsburgh, Pennsylvania, and brings together best-of-class service and tools to help clients achieve their own life and financial goals.

They are a [fee-based](#) Pittsburgh financial planning and wealth management firm, which means that advisors may earn commissions from securities or the sale of insurance products.

D.B. Root & Company has been included for their many niched services for individuals and businesses.

Key Factors That Enabled D.B. Root & Company to Rank as a Top Pittsburgh Financial Planner

Life Plan 20/20®

In order to encompass a range of services not traditionally offered elsewhere, the [Life Plan 20/20](#) was created.

With this approach, the team of Pittsburgh financial planners at D.B. Root & Company combine portfolio management, tax and insurance advice, estate and retirement planning, and other essential financial services into one total package that is designed to keep your life goals on track.

Through the Life Plan 20/20 system, each financial advisor can gain a sound understanding of their client's complete financial health. Specific areas of this approach are detailed in the image below.



Best Pittsburgh Financial Advisors

Strategic AIM™ Asset Management

Backed by a team of expert Pittsburgh financial advisors, the wealth management process at D.B. Root & Company is known as Strategic AIM™.

This process uses in-depth research, individual financial goals, and risk preferences to create a diversified, customized portfolio for each client.

Strategic AIM™ follows a repeatable cycle between each client and their portfolio, which includes the following components:

- **Client**—Goals and Objectives, Financial Profile, Time Horizon, Risk Profile
- **Financial Advisor**—Portfolio Management Expertise, Investment Selection, Monitoring and Rebalancing

- **Investment Committee**—Four Seasons Macroeconomic Analysis, Tactical Adjustments, Investment Recommendations
- **Portfolio**—Stocks, Bonds, Cash

Rating Summary

With two proprietary approaches to Pittsburgh wealth management and financial planning, D.B. Root & Company can provide significant value as a top financial advisor in Pittsburgh.

Both the Life Plan 20/20® and the Strategic AIM™ processes allow clients and advisors to view financial health in a holistic, comprehensive manner, making it possible to address a number of financial challenges at once.

Although the firm uses a fee-based structure, clients can significantly benefit from these comprehensive services, earning D.B. Root & Company an overall 5-star rating as a best financial advisor in Pittsburgh.

Read More: Top Financial Advisors in Oklahoma City & Tulsa, Oklahoma

Fragasso Financial Advisors Review

As a fee-based Pittsburgh wealth management firm, [Fragasso Financial Advisors](#) has been representing clients for more than 40 years through comprehensive wealth management, portfolio management, and retirement planning services.

Located in the heart of downtown Pittsburgh, they serve clients ranging from affluent individuals to retirement plan sponsors to non-profit institutions.

Key Factors That Enabled Fragasso Financial to Rank as a Top Wealth Management Firm in Pittsburgh

Comprehensive Wealth Management

Ever-changing political and economic environments urge this team of Pittsburgh financial planners to approach each client's circumstances with a fresh approach couched in time-tested principles.

Successful families receive the benefit of a variety of blended financial planning and wealth management services, including:

- Income Tax Reduction Strategies
- Business Succession Planning
- Retirement Capital Sufficiency
- Education Funding
- Charitable and Family Gifting Strategies
- Cash Flow Scrutiny
- Long-Term Care Cost Analysis
- Stock Option Management
- Coordination of Planning with Attorney and Accountant
- Life Insurance
- Estate Planning

In-House Portfolio Management

Once your portfolio has been cultivated to perfection, Fragasso's Portfolio Management Department steps in with an eight-person team of seasoned Pittsburgh financial planners whose sole job is to provide an on-going portfolio management.

This means that each client has a dedicated team of three: one financial advisor, one administrative specialist, and one member of the portfolio management team.

Rather than have their Pittsburgh financial advisors juggle both financial plans and investments, this separation allows for focused, expert attention solely on each aspect of a client's financial plan.

When it comes to investments, having a dedicated portfolio manager can provide clients with a significant advantage, ensuring expert, careful attention.



Top Pittsburgh Financial Advisors

Rating Summary

With a comprehensive approach to Pittsburgh wealth management and a dedicated in-house portfolio management team, Fragasso Financial Advisors is a great option for any client looking for in-depth wealth management.

Although the firm is fee-based, it's worth noting that Fragasso holds itself to a fiduciary standard as a Registered Investment Advisor, instilling trust and supporting transparency, making them one of the best financial advisors in Pittsburgh.

Related: Best Financial Advisors in Iowa (Des Moines, Ames, Dubuque, and Davenport)

Hefren-Tillotson Review

As a company that claims to provide “meticulous wealth management since 1948,” [Hefren-Tillotson](#) has certainly laid down a legacy.

With over \$11 billion in client assets, they serve individual clients, businesses, and institutions and non-profits.

Although this Pittsburgh wealth management firm is fee-based, we have included them on this list for the value that they offer potential clients.

Key Factors That Enabled Hefren-Tillotson to Rank as a Top Financial Planner in Pittsburgh

Mission, Vision & Values

As one of the best financial advisors in Pittsburgh, Hefren-Tillotson adheres to a strong, principle-driven foundation while implementing wealth management services.

The firm's mission is “[to become and remain our clients' Most Trusted Advisor](#),” which speaks to their client-centric approach. This approach is echoed by their vision to deliver an unrivaled and successful combination of financial and customer service.

Finally, the team of Pittsburgh financial advisors at Hefren-Tillotson share a strong set of values, which include:

- Deep respect for the individual

- Integrity in thought and action
- Teamwork supported by a family-oriented culture
- Relentless commitment to excellence

The MASTERPLAN® Approach

To cover a range of Pittsburgh financial planning and wealth management needs, Hefren-Tillotson has developed a comprehensive [MASTERPLAN®](#) Approach. These five steps flow easily from one to the other, and include:

- **Meet Face-to-Face:** Learning about your values, goals, and financial situations is the building block to long-term success. Along with a personal conversation, your financial advisor will gather necessary documents as they prepare to formulate a plan for you.
- **Determine Your Goals, Priorities, and Risk Tolerances:** This step in the planning process allows your financial advisor to better understand what plan will best support both your long and short-term goals.
- **Develop Your Own Personal Financial Plan in Writing:** Each plan developed is as unique as your fingerprint. A written plan will be presented to you to clearly outline all goals and objectives, along with the plan of action that will help you meet those goals.
- **Implement Strategies, Then Adjust Regularly as Situations Arise:** Your meticulously crafted plan is now put into action and carefully monitored and reviewed to ensure that it is working hard to get you to where you want to be.

This approach is also available in a MASTERPLAN Financial Review, providing a comprehensive overview for individuals that are primarily interested in financial planning to implement on their own terms.

Rating Summary

As one of the top wealth management firms in Pittsburgh, Hefren-Tillotson provides their clients with deep financial expertise and a comprehensive approach.

Through the MASTERPLAN® approach, clients can choose between holistic wealth management and basic financial planning, allowing clients to select the process that best fits their needs.

This flexibility, combined with a strong foundation of principle-driven financial advisement, solidifies the firm's 5-star rating as one of the best financial advisors in Pittsburgh to partner with this year.

Don't Miss: Top Financial Advisors in San Antonio and New Braunfels, Texas

McMahon Financial Advisors, LLC Review

[McMahon Financial Advisors, LLC](#) brings to the table over 20 years of experience, helping clients throughout the Pittsburgh area reach and surpass their financial goals.

McMahon Financial Advisors specializes in investment management, business services, education planning, as well as retirement and estate planning.

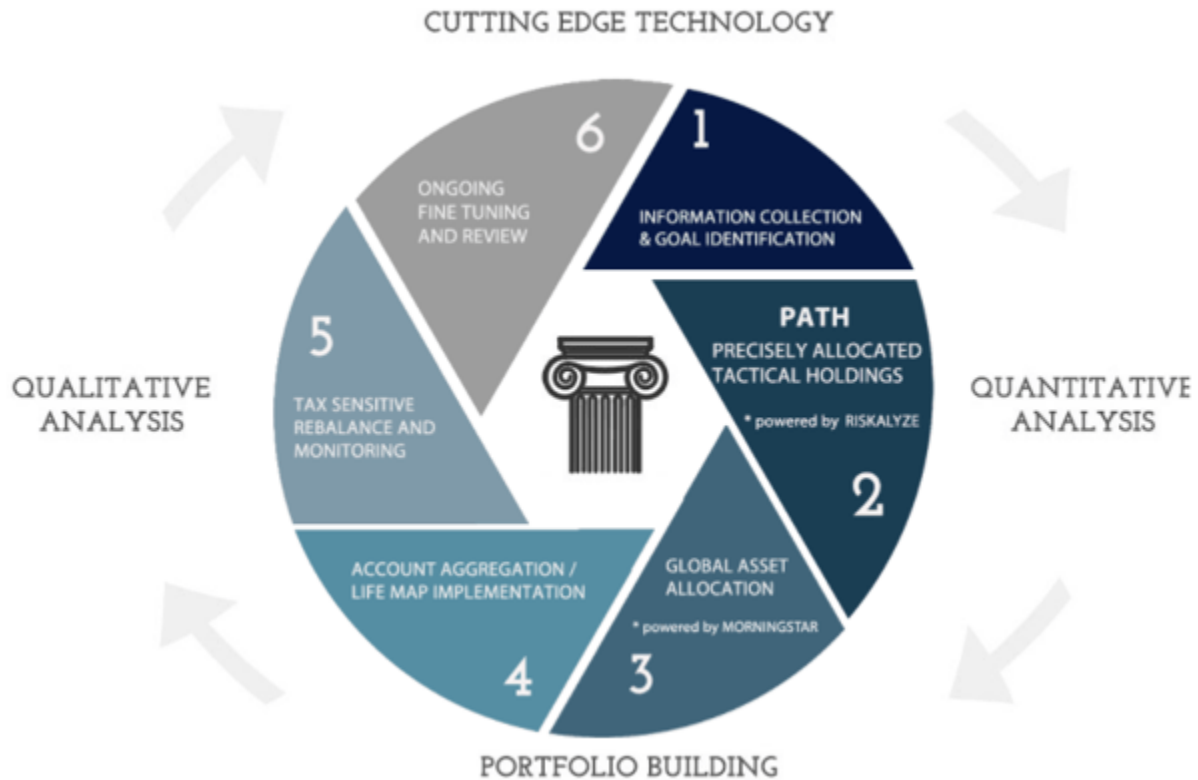
This Pittsburgh wealth management firm is a [fee-based](#) firm, but we have included them on this list for the comprehensive range of services that they provide.

Key Factors That Enabled McMahon Financial Advisors to Rank as a Top Pittsburgh Wealth Management Firm

A Dual Portfolio Program

Clients of this Pittsburgh wealth management firm have access to two different portfolio approaches. Both portfolios allow uninterrupted online access. Let's take a brief look at both:

- **Compass Portfolio Program:** The Compass Portfolio Program offers sophisticated management services for investors while utilizing robust ETF portfolios. This plan offers seamless integrations with the MAP aggregation tools which provide a 360-degree view of clients' financial lives.
- **MAP™ Portfolio Program:** The MAP Portfolio Process utilizes advanced financial planning technologies and pairs them along with your advisors' experience. The premise here is to create a client-focused "MAP" for the road ahead.



Best Pittsburgh Financial Planners

Comprehensive Financial Services

As a top financial advisor in Pittsburgh, McMahon Financial offers expert financial services across four different categories: Investment Management, Business Services, Estate Planning, and Retirement and Education Planning.

Clients partnering with McMahon Financial for Investment Management can benefit from the following advantages:

- Personalized, one-on-one attention
- State-of-the-art technology
- Plans build for lifelong financial security

Managing risk within a portfolio is one of the cornerstones of McMahon Financial’s successful Business Strategies. These services include:

- Defined Benefits Planning
- Deferred Compensation Planning
- Buy-Sell Arrangements
- Asset Protection
- 401k Formation and Maintenance
- Key Person Coverage

With over 20 years of experience, Estate Planning services through this top Pittsburgh financial planning firm include:

- Portfolio management
- Estate execution
- Coordination of a network of tax and law professionals

Finally, a driving force behind Retirement and Education Planning with this financial advisor in Pittsburgh is the belief that it is never too early to plan for your financial future.

After clearly identifying goals and objectives, clients receive individual and ongoing evaluation to ensure that both retirement goals and education goals are actively worked towards.

Rating Summary

With two in-depth, expert portfolio programs to choose from and comprehensive service offerings, McMahon Financial provides their clients with strong, well-defined value.

However, our review was unable to find a statement of a fiduciary commitment, which dictates that financial advisors must always act in the best interest of their clients.

As a fee-based firm, this accountability is important to ensuring that clients can trust that advice is given for their own benefit, rather than the benefit of the firm through commissions or additional compensation.

By taking on a fiduciary commitment, McMahon Financial could easily increase both the value they bring to clients and their overall rating as a top financial advisor in Pittsburgh.

PWA Wealth Management Review

[PWA Wealth Management](#) is an independent financial advisor in Pittsburgh, providing financial planning and wealth management services for individuals, corporations, and pension plans.

Although PWA Wealth Management is a [fee-based](#) firm, we have included them as a top financial advisor in Pittsburgh based on their independence, fiduciary commitment, and range of services.

Key Factors That Enabled PWA Wealth Management to Rank as a Top Financial Planner in Pittsburgh

Independent Firm with a Fiduciary Commitment

As a top financial advisor in Pittsburgh, PWA Wealth Management maintains a strong commitment to operating independently, meaning they are under no obligation to recommend specific financial products.

Their fiduciary commitment further strengthens trust between client and advisor, as the firm is legally held to act in the best interest of their clients at all times.

When it comes to transparency and trust, clients should look for independent firms with a fiduciary commitment first and foremost—two characteristics that PWA Wealth Management embodies.

Comprehensive Financial Services

Financial plans and goals are subject to changes over time, which means that the best Pittsburgh financial advisors should provide a range of financial services to accommodate long-term financial health.

PWA Wealth Management offers four tiers of financial services, detailed below.

- **Investment Management**—Portfolios are custom-built to fit each client's unique financial situation, cash flow needs, risk tolerance, and long-term objectives
- **Planning Services for Individuals**—Investment management, retirement planning, estate planning, philanthropy, education, and more
- **Planning Services for Businesses**—Plan for succession, continuation, sale, retirement plans, and benefits
- **Planning Services for Institutions**—Identify goals and strategies, develop an Investment Policy Statement, and institutional investment management
- **College Planning**—Create and implement a plan based on resources and educational goals, including 529 plans and Coverdale education accounts



Top Financial Planners in Pittsburgh

Rating Summary

With a fiduciary commitment and an independent structure, PWA Wealth Management offers their clients transparency and trust, two key elements of any successful financial partnership.

Additionally, their financial services are well-defined and detailed, making it easy for potential clients to evaluate the firm and solidifying their ranking as a best financial advisor in Pittsburgh.

Waldron Private Wealth Review

Founded in 1995, [Waldron Private Wealth](#) is a fee-based financial wealth management firm with a fiduciary commitment to always act in the best interests of their clients.

Located in Bridgeville, Pennsylvania, Waldron Private Wealth provides a wide range of financial services for individuals, families, and family offices.

While we do not typically rank fee-based advisors, we have chosen Waldron Private Wealth as a top Pittsburgh financial advisor for the firm's fiduciary commitment, boutique approach, and impressive range of financial services.

Key Factors That Enabled Waldron Private Wealth to Rank as One of the Top Pittsburgh Financial Planners

Boutique Approach

For clients that want a higher level of service and personalized attention, Waldron Private Wealth is a great choice.

This Pittsburgh financial planner maintains a boutique structure to provide clients with a high degree of focused attention, keeping their client-to-staff ratio no higher than 5 to 1.

Not only does this provide clients with the in-depth attention needed to create solid financial plans, but it also encourages long-term relationships, making Waldron Private Wealth one of the top financial advisors in Pittsburgh for new clients to consider.

Wide Range of Services

For individuals, families, and family offices, Waldron Private Wealth provides an extensive range of services to meet a variety of financial planning and wealth management needs. These services include:

- Financial Planning
- Investment Management Services
- Income Tax Planning
- Trust and Estate Planning
- Insurance and Asset Protection Strategies
- Family Office Support Services
- Business Owner Advisory Services
- Executive Compensation and Benefits
- Family Wealth and Next Generation Wealth Planning
- Lifestyle Services

What makes this list of services stand out is that each category contains multiple sub-services, providing a truly comprehensive approach to Pittsburgh wealth management.

Rating Summary

As a top financial advisor in Pittsburgh, Waldron Private Wealth offers clients the unique opportunity to receive custom-built, individualized financial services.

With a relationship-based approach, a wide range of services, and a fiduciary commitment, clients can trust that they are receiving expert and unbiased financial

advice, making Waldron Private Wealth one of the best financial advisors in Pittsburgh to consider partnering with this year.

Conclusion - Top 10 Best Financial Advisors in Pittsburgh, Pennsylvania

Now that you've carefully analyzed the top financial advisors in and around Pittsburgh, you are either feeling more confident than ever about what exactly your financial needs are, or you may have several additional questions.

Your best bet is to narrow down this list of the top financial advisors in Pittsburgh by getting rid of firms that don't serve clients within your specific demographic, or perhaps those that don't match up with your vision.

After that, it's time to communicate with a few prospective Pittsburgh wealth management firms and feel out which advisor is best suited for your needs.

Above all, enjoy the process for what it is and know there is a financial advisor in the Pittsburgh area that can help you reach your financial goals.

Rate Table Disclaimer

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

Image sources:

- <https://pixabay.com/en/america-pittsburgh-bridge-holiday-2053302/>
- <http://www.aufmanassociates.com/>
- <http://www.billfew.com/our-financial-advisor-associates/>
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