
Top 11 Best Financial Advisors in Cincinnati, OH | 2018 Ranking

RANKING & REVIEWS BEST FINANCIAL ADVISORS IN CINCINNATI

Finding the Top Financial Advisors in Cincinnati, Ohio

Ohio boasts a lot of safety-related firsts. The state established the first ambulance service and the first professional municipal fire department in Cincinnati, and even America's first traffic light in Cleveland. It also hosts the first city, Akron, to use police cars.

With such a proactive history, it only makes sense that the state's residents would look for the best financial advisors in Cincinnati. Money equals security. This means that making sure it's being used productively and managed responsibly is of the utmost importance.

Whether you earn your money putting out fires or making traffic lights, a Cincinnati wealth management firm can help manage your money right.

Of course, making money takes time. You may not have enough hours in the day to look up the best financial advisors in Cincinnati. AdvisoryHQ has rounded up several of the top wealth management firms in Cincinnati and reviewed some of their best features.

Save the googling and start your search with our list of the best wealth management firms in Cincinnati.



Award Emblem: Best 11 Financial Advisors in Cincinnati, Ohio

Top 11 Best Financial Advisors in Cincinnati, Ohio | Brief Comparison & Ranking

Best Financial Advisors in Cincinnati, OH	Highlighted Features	Ratings
Bartlett Wealth Management	Financial impact of divorce assessment	5
Berno Financial Management, Inc.	Total portfolio approach	5
Foster & Motley Corporation	Extensive financial services	5
Hengehold Capital Management, LLC	P&G retirement planning	5
Johnson Investment Counsel, Inc.	Wide range of financial divisions based on assets under management	5
Madison Wealth Management	Outlined path to success	5
Total Wealth Planning	Business value enhancement analysis	5

The Asset Advisory Group	TAAG 360° dashboard provides a comprehensive financial overview	5
OJM Group, LLC	Specialize in financial advice for doctors & business owners	3
Ritter Daniher Financial Advisory, LLC	Experienced & accredited advisory team	3
RiverPoint Capital Management	Comprehensive approach to investment management	3

Table: Top 11 Best Financial Advisors in Cincinnati | Above list is sorted by rating

Tips for Selecting the Best Cincinnati Financial Advisors and Wealth Management Firms

When it comes to choosing the best Cincinnati financial planner, 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 Cincinnati has to offer, and match those services up with your own personal financial goals.

As you will see in the following reviews for financial advisors in Cincinnati, each Cincinnati financial planner 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 Cincinnati financial planner that offers a broader range of services.

Once you've narrowed down your choices to a select few of these top-ranking Cincinnati wealth management firms, 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" a prospective financial advisor in Cincinnati before committing to their services.

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, wealth management 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 Financial Advisors in Cincinnati

Below, please find the detailed review of each firm on our list of the best financial advisors in Cincinnati. We have highlighted some of the factors that allowed these wealth management firms in Cincinnati 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.

- [Bartlett Wealth Management](#)
- [Berno Financial Management, Inc.](#)
- [Foster & Motley Corporation](#)
- [Hengehold Capital Management, LLC](#)
- [Johnson Investment Counsel, Inc.](#)
- [Madison Wealth Management](#)
- [OJM Group, LLC](#)
- [Ritter Daniher Financial Advisory, LLC](#)
- [RiverPoint Capital Management](#)
- [The Asset Advisory Group](#)
- [Total Wealth Planning](#)

Click below for previous years’ rankings:

- 2016 Review: [Top 10 Best Financial Advisors in Cincinnati](#)
- 2017 Review: [Top 10 Best Wealth Management Firms in Cincinnati](#)

Bartlett Wealth Management

Founded in 1898, [Bartlett Wealth Management](#) boasts an impressively long history. Although Bartlett Wealth Management is a [fee-based](#) firm, we have chosen them as a top Cincinnati financial planner for their comprehensive approach and wide range of services.

Key Factors That Enabled Bartlett Wealth Management to Rank as One of the Top Wealth Management Firms in Cincinnati

The Financial Planning Process

While financial planning is most commonly coupled with investment management services, it is also provided as an independent service. Bartlett Wealth Management will stand as your financial advocate, getting to know you and your objectives from the start.

Here's an overview of what the financial planning process with this Cincinnati wealth management firm may include:

- Retirement planning
- Taking advantage of an elderly retirement package
- Managing a large stock position
- Managing an inheritance
- Planning and funding charitable contributions
- Stock option exercise
- Birth of a child or grandchild
- Financial impact of divorce
- Coping financially with an elderly parent
- Coping financially with the death of a spouse

Investment Management Services

While maintaining focus on your financial objectives, your team of Cincinnati financial advisors will develop you create a diversified and balanced portfolio that will minimize risk and deliver consistent high-yielding returns.

The following are some of Bartlett Wealth Management's key components of wealth management in Cincinnati:

- **Bartlett Fund Advantage**—Investment professionals identify superior funds with below-average expenses
- **Environmental, Social, Governance Investing**—Provides socially responsible portfolios without sacrificing investment performance
- **Fixed Income**—Dedicated investment team focuses solely on the fixed income components of a portfolio
- **Equity Management**—Focuses on proven financial performance to pinpoint higher-quality companies with above-average earnings
- **Alternative Investments**—Opportunities outside of traditional asset classes of stocks, bonds, and cash



Bartlett Wealth Management

Rating Summary

While the firm does use a fee-based structure, Bartlett Wealth Management is an independent firm that has adopted the fiduciary standard, laying a strong foundation of trust and transparency.

Clients have plenty of benefits to gain from working with Bartlett Wealth Management, including a strong, team-based approach, in-house research analysts, and comprehensive financial services, making the firm one of the best Cincinnati financial advisors to consider partnering with this year.

See Also: Top Wealth Managers and Advisors in Florida

Berno Financial Management, Inc. Review

Founded in 1993, [Berno Financial Management](#) is an independent, [fee-only](#) financial advisor in Cincinnati.

These Cincinnati financial planners serve clients with an annual income of at least \$100,000 or pre-retirees and individuals in the early stages of retirement with an investible portfolio of \$1,000,000 to \$5,000,000.

Key Factors That Enabled Berno Financial Management, Inc. to Rank as One of the Top Cincinnati Wealth Management Firms

Investment Philosophy

Berno Financial believes in broad diversification of your investment portfolio while effectively minimizing risk and taxes. The firm's investment philosophy for wealth management in Cincinnati is founded on objective, academically-based models that have withstood the test of time.

The following is a listing of some, but not all, of the diversification approaches your Cincinnati financial advisor may suggest:

- U.S. stocks
- International and emerging market stocks
- Low-volatility investments
- Corporate, government, or municipal bonds
- Inflation-protected bonds
- Real estate investment trusts
- Commodities

Wealth Management Services

Managing and growing your wealth properly are the cornerstones of wealth management services from Bernardo Financial. Based on your own personal needs and goals, a customized wealth management plan from your financial advisor in Cincinnati may include:

- Education funding
- Cash flow management
- Insurance needs
- Income tax management
- Investment management
- Retirement planning
- Estate planning



Top Cincinnati Financial Advisors

Rating Summary

As an independent financial advisor, Berno Financial offers unbiased, trusted advice, focusing on your best interests by avoiding commission-based pressures.

While the firm may be one of the smallest financial advisors in Cincinnati on our list, Berno Financial approaches every financial challenge as a team, allowing clients to leverage the benefits of multiple points of view and expertise.

With a fee-only structure, a commitment to independence, and a wide range of financial capabilities, Berno Financial is one of the best Cincinnati financial advisors to consider partnering with this year.

Don't Miss: Best Financial Advisors in San Diego, California

Foster & Motley Corporation Review

[Foster & Motley Corporation](#) is a [fee-only](#) Cincinnati financial advisor that offers comprehensive financial planning and investment management services to clients in the Tri-State region and across the country.

Key Factors That Enabled Foster & Motley Corporation to Rank as a Top Cincinnati Financial Planner

Extensive Financial Services

A good financial plan will encompass and integrate all components of your financial life, which is something that the team at Foster & Motley has an expert eye for.

Backed by an investment philosophy that emphasizes income, value, and quality, Foster & Motley offers a wide range of financial planning and wealth management services, including:

- Retirement Planning
- Tax Planning
- Estate Planning
- Portfolio Creation & Management
- Insurance Planning
- Cash Flow Planning
- Wealth Optimization
- Net Worth Analysis
- College Planning
- Money Movement
- Charitable Gifting
- Stock Option Planning

All of this starts with an initial meeting where your advisor gets to know you, your current situation, and where you want to be in the future. Initial consultations with these Cincinnati financial planners are always free.

Innovation and Continuing Education

The financial industry is a very dynamic industry. Factors that are legal and political, domestic and international can have an impact on an individual's financial planning and investment strategy.

As a result, it is important for one's wealth management firm in Cincinnati to foster a culture of continuing education and learning.

As one of the top Cincinnati financial planners, Foster & Motley does just that. Not only do they regularly review their processes to check that they are up to date, but they encourage their employees to keep themselves updated as well.

They invest in the education of their employees and require all of them to have completed (or be in the process of completing) a professional certification.



Foster & Motley Corporation

Rating Summary

As a fee-only RIA, Foster & Motley is held to a fiduciary standard and is legally required to put clients' interests before the interests of the firm.

Not only does this encourage transparency, but it also supports trust between clients and advisors, an integral element in any successful financial plan.

With comprehensive financial services, a fee-only structure, and a client-centric approach, Foster & Motley is one of the best Cincinnati financial advisors to consider partnering with this year.

Related: Top Financial Advisors in Lexington & Louisville, Kentucky

Hengehold Capital Management, LLC Review

Having served the needs of clients for nearly 30 years, [Hengehold Capital Management, LLC](#) is a **fee-only** Cincinnati financial advisor that offers investment and financial planning services, retirement planning, and a host of plans and resources for Procter & Gamble retirees.

The firm maintains two Cincinnati locations; one in the Western Hills area, and another in the Blue Ash area.

Key Factors That Enabled Hengehold Capital Management to Rank as a Top Cincinnati Wealth Management Firm

Planning for Your Retirement

Financial independence doesn't just happen. It takes careful planning, commitment, and a great team of Cincinnati financial advisors to guide you.

Hengehold Capital's mission is to assist you in building a dependable financial foundation that will last a lifetime, using expert strategies like:

- Cash flow planning
- Social Security planning
- Family gifting strategies
- Regular monitoring of your financial plan
- Stock option exercise strategies
- Concentrated stock position risk management
- Core and tactical asset allocations
- Determination of reasonable withdrawal rates
- Distribution strategies: Profit Sharing Trust (PST) including net unrealized appreciation and alternative cost basis methods
- Tax and financial decision review, evaluation, and implementation
- Using low-cost basis stock in charitable giving and estate planning

P&G Retirement Services

As a multi-generational wealth management firm located in the heart of Cincinnati, Hengehold Capital has helped many Procter & Gamble families transition into retirement. They know how hard you've worked, and they want to help you get it right the first time.

P&G retirees have access to a wealth of [tools and services](#) specifically tailored to their needs. Some of these services are:

- Creating a roadmap of all the components of your P&G retirement plan
- Working through tax and financial opportunities
- Planning options that may increase your family's wealth and retirement income
- Claiming strategies for Social Security
- Determining if lump-sum distribution is appropriate for you
- Handling distributions at different times in your life

Rating Summary

With decades of experience working with some of the region's largest employers, Hengehold Capital provides pre- and current retirees with the proven expertise to handle their unique retirement needs.

Additionally, as a fee-only Cincinnati financial planner with a fiduciary commitment, clients can trust that all financial advice is both transparent and without bias, solidifying Hengehold Capital as a top financial advisor in Cincinnati.

Popular Article: Best Financial Advisors in Oklahoma City & Tulsa, Oklahoma

Johnson Investment Counsel, Inc. Review

With locations in Cincinnati, Columbus, Cleveland and Dayton, [Johnson Investment Counsel, Inc.](#) is Ohio's largest independent investment advisory firm.

As a [fee-only](#) Cincinnati financial planner, Johnson Investment offers integrated wealth management services to individuals, corporations, retirement plans, foundations, and endowments.

Key Factors That Enabled Johnson Investment Counsel, Inc. to Rank as One of the Top Cincinnati Wealth Management Firms

A Principled Investment Group

The following is a list of core investment principles that drives Johnson Investment Counsel:

- An integrated, team-based approach
- Unbiased investment advice

- Risk control through diversity
- Fee-only management—no commissions
- Passion for clients and their goals

Along with these core investment principles, the firm provides a strong value proposition to their clients through maintaining high integrity, independence, transparency, and experience.

Notably, Portfolio Managers at Johnson Investment Counsel average over two decades of experience and over 15 years with the firm, speaking highly to both the expertise of the firm and their company culture.

Wide Range of Financial Divisions

To best serve the diverse needs of their clients, Johnson Investment Counsel maintains a wide range of financial divisions. These include:

- **Wealth Advisory Services**—Integrated financial services primarily for individuals and families with over \$1 million of investable assets
- **Family Office Services**—Sophisticated solutions to help families with over \$10 million to accumulate, preserve, and transfer wealth
- **Access**—Personal investment and financial planning for families and individuals with up to \$1 million in investable assets
- **Institutional Management**—Customized solutions to address unique financial challenges of institutions
- **Trust Company**—Helps families manage wealth with trust services for individuals, charitable organizations, endowments, foundations, and retirement plans
- **Charitable Gift Fund**—Facilitates entrepreneurial giving in flexible, meaningful, and tax-efficient ways
- **Johnson Mutual Funds**—Seven publicly available mutual funds



Johnson Investment Counsel, Inc.

Rating Summary

As a fee-only firm with a fiduciary commitment, Johnson Investment Counsel, Inc. provides the ideal wealth management partnership. All advice is both transparent and without bias, establishing a solid foundation of trust within the client-advisor relationship.

Uniquely, Johnson Investment Counsel also excels at providing comprehensive levels of service for clients that want to invest varying monetary amounts, making financial services both accessible and customizable for clients from all walks of life.

With a client-centric philosophy and a wide range of services to choose from, Johnson Investment Counsel is one of the best Cincinnati wealth management firms to consider partnering with this year.

Read More: [Top Financial Advisors in New York, NY – Ranking & Comparison](#)

Madison Wealth Management Review

Founded in 2000, [Madison Wealth Management](#) is [fee-only](#) financial advisor in Cincinnati. The firm also maintains office locations in Leesburg, Virginia, and Bethesda, Maryland.

Key Factors That Enabled Madison Wealth Management to Rank as a Top Cincinnati Wealth Management Firm

Guiding Principles

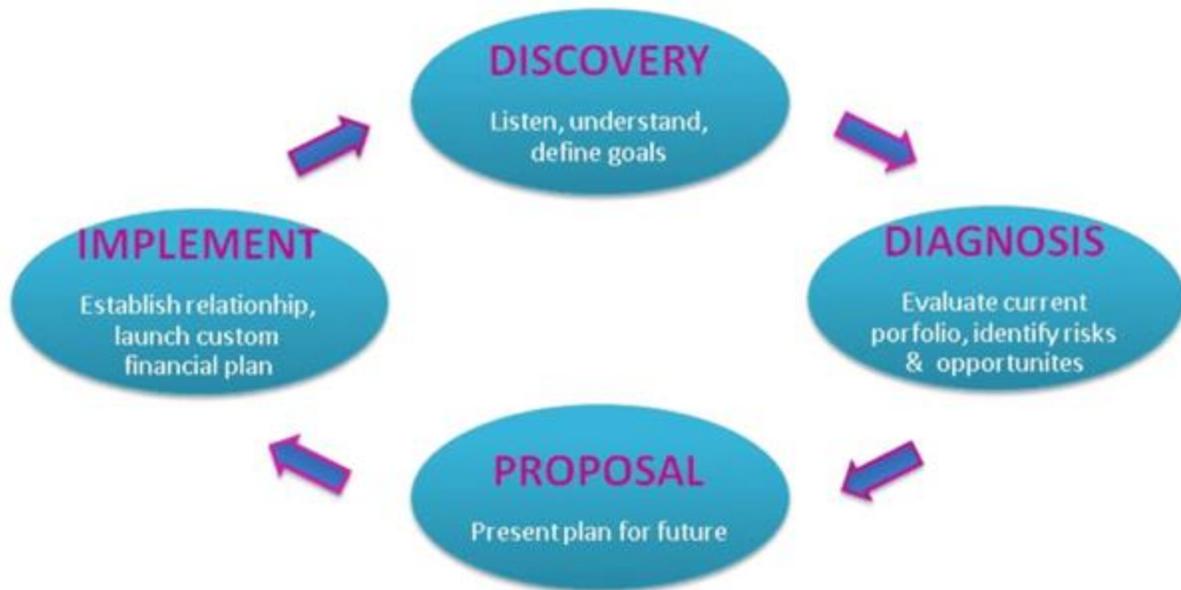
The team at Madison Wealth adheres to a set of disciplined guiding principles that are the driving force behind their operations:

- Independence
- Transparency
- Low client-to-advisor ratio
- Philosophy of asset allocation and diversification
- Fiduciary Standard
- Experience
- Objectivity
- Aligning their interests with their clients'
- Confidentiality
- Education

Your Path to Success

Understanding, communication, mutual respect, and trust are the cornerstones of a successful professional relationship. Madison Wealth anticipates your needs and will outline a path to achieve your goals through:

- **Discovery:** This step involves careful analysis of your financial situation, your dreams, your priorities—everything that affects the way you see your finances.
- **Diagnosis:** Your current portfolio will be evaluated, and your advisor will ask you key questions to determine what's going on with your finances right now.
- **Proposal:** Your Cincinnati financial advisor will create a customized plan of action.
- **Implement:** Once all parties are satisfied with the plan, your plan is put into action.



Madison Wealth Management

Rating Summary

As an independent Registered Investment Advisor (RIA), Madison Wealth stands strong with a fiduciary commitment to you. This Cincinnati wealth management firm doesn't receive commissions for selling products or services, and they always act in your best interest.

With a fee-only commitment and a strong set of client-centric principles, Madison Wealth Management is one of the best financial advisors in Cincinnati to consider partnering with this year.

Related: Top Financial Advisors in Denver, Colorado Springs, and Boulder (Colorado)

OJM Group, LLC Review

Headquartered in Cincinnati, Ohio, [OJM Group, LLC](#) is a financial firm with over 1,000 clients in 47 states. These Cincinnati financial advisors offer a variety of wealth management and consulting services to doctors, business owners, and independent advisors.

OJM Group does not state whether they are a fee-based or fee-only firm. As always, we recommend verifying fee structure before partnering with any financial advisor in Cincinnati.

Key Factors That Enabled OJM Group, LLC to Rank as a Top Cincinnati Wealth Management Firm

For Doctors

Doctors have to consider a unique set of circumstances when planning their financial futures. OJM Group has been recognized as one of the 150 Best Financial Advisors for Doctors by Medical Economics for [nine separate years](#).

Helping you focus on preserving your wealth while reducing your tax liability is essential, including addressing additional areas of focus like:

- Declining reimbursements and increasing taxes
- Asset protection for personal and practice assets
- Tax-efficient insurance, investments, and financial planning

As a leading financial authority for medical professionals, OJM Group has also written more than 10 books for doctors, and has published more than 100 articles in leading journals and periodicals.

For Business Owners

As a business owner, you realize taxes and financial overhead, along with a shaky economy, pose many risks to your security. Fortunately, these Cincinnati financial advisors know just how to mitigate that risk to preserve both your wealth and your business.

Not only is the team at OJM Group highly experienced in helping business owners navigate treacherous terrain, but they are business owners themselves, adding to the firm's personal expertise.

Rating Summary

With specialties in assisting doctors and business owners, OJM Group is a valuable resource for clients that want their Cincinnati financial advisor to understand the unique challenges faced by combining career and personal financial planning.

However, because we cannot verify the firm's fee structure, OJM Group ultimately earns a 3-star rating, as this can make it challenging for potential clients to fully evaluate the firm.

By clearly stating whether they use a fee-based or fee-only fee structure, OJM Group could easily improve both their value proposition to clients and their rating as a top financial advisor in Cincinnati.

Don't Miss: Best Financial Advisers in Leeds, UK

Ritter Daniher Financial Advisory, LLC Review

Simplicity. Serenity. Freedom. Those are the three things [Ritter Daniher Financial Advisory, LLC](#) wants you to have. Through their comprehensive, [fee-only](#) wealth management services, they aim to educate, motivate, and support their clients.

Key Factors That Enabled Ritter Daniher Financial Advisory, LLC to Rank One of the Top Wealth Management Firms in Cincinnati

Personal Wealth Management

Streamlining wealth management services is proven and effective and allows you to reach your goals seamlessly.

With an organized approach, ongoing reviews, and an adaptable philosophy, here's a look at some of the benefits of personal wealth management through Ritter Financial:

- Debt management
- Cash flow analysis
- Personal balance sheet preparation
- Employee benefit planning
- Expense management planning
- College fund analysis
- Insurance reviews and needs analysis

Experienced Advisory Team

With five Cincinnati financial advisors bringing a combined total of 90 years of experience, you are in good hands with Ritter Financial.

These Cincinnati financial planners bring a diverse range of experience and industry accreditations to solve a variety of financial challenges, including:

- CFP®—Certified Financial Planner
- CFS—Certified Fund Specialist
- CTFA—Certified Trust and Fund Advisor

- CLU—Chartered Life Underwriter
- AEP®—Accredited Estate Planner
- RP—Registered Paraplanner

Rating Summary

As a Registered Investment Advisor (RIA), Ritter Financial acts as a fiduciary to their clients, always serving with utmost independence, uncompromised dedication, and trust.

While Ritter Financial boasts an experienced team and a diverse range of financial planning services, the firm provides sparse information about their investment management approach. For clients that want a Cincinnati financial advisor to provide expert portfolio management, this lack of information makes it challenging to fully evaluate the firm.

By making detailed information on their investment philosophy and portfolio management process readily available, Ritter Financial can easily improve both their value proposition to clients and their rating as a top financial advisor in Cincinnati.

Popular Article: Top Financial Advisors in Calgary, Alberta

RiverPoint Capital Management Review

[RiverPoint Capital Management](#) is an independent investment advisory firm with offices in Cincinnati, Ohio, and Indianapolis, Indiana.

They stand as a [fee-only](#) Registered Investment Advisor (RIA) and offer a variety of wealth management services to a variety of clients.

Key Factors That Enabled RiverPoint Capital Management to Rank as a Top Wealth Management Firm in Cincinnati

Investment Management

RiverPoint Capital takes an active approach to creating diversified portfolios with a variety of assets, including cash, fixed incomes, equities, and alternative investments. Below is a brief look at RiverPoint Capital's investment views:

- **Equity Investments:** RiverPoint Capital favors companies who hold dominant roles within their industry.

- **Bond Investments:** These portfolios offer the opportunity to preserve capital and create a steady stream of income.
- **Large Stock Position Management:** The Cincinnati financial advisors at RiverPoint Capital have a great deal of experience managing large positions of low-cost stocks.
- **Independent Investment Research:** Conducting their own proprietary research allows RiverPoint Capital a leading edge on decision-making and market analysis.

Estate Planning

A person's dreams for the future often span more than one generation. A detailed estate plan allows you to leave the exact legacy you want. Through the use of a comprehensive estate plan, RiverPoint Capital will create trusts, power of attorneys, and health care directives.

Your Cincinnati financial planner can help you answer questions like:

- Who would you like to inherit your assets?
- How will you minimize estate taxes?
- How will you fund potential tax liability?
- Who do you trust to manage your affairs if you cannot?
- If you passed away, who would care for your children?

Tax management is essential through all phases of estate planning and implementation, meaning that your Cincinnati financial advisor can ensure a tax-efficient process.

Rating Summary

As an independent, fee-only Cincinnati financial planner with a fiduciary commitment, RiverPoint Capital provides a lot of advantages for clients that value transparency and trust within the advisor-client relationship.

However, when it comes to communicating details about specific services, RiverPoint Capital falls short when compared to competing top financial advisors in Cincinnati.

For example, without specific services listed beneath Financial Planning—like budgeting, debt analysis, cash flow analysis, etc.—it's difficult to determine how financial planning differs from basic investment management.

Similarly, although the firm lists [wealth management services specifically for women](#), there is no explanation as to what sets these services apart from traditional wealth management capabilities.

By emphasizing the unique capabilities of their financial planning and wealth management for women services, RiverPoint Capital could easily improve both their value proposition to clients and their rating as a top firm offering wealth management in Cincinnati.

The Asset Advisory Group Review

Founded by Jeannette Jones in 1988, [The Asset Advisory Group](#) is a fee-only Cincinnati financial advisor that offers a wide range of services for a range of clients, no matter what stage of the wealth accumulation process they are in.

Key Factors That Enabled The Asset Advisory Group to Rank as Top Cincinnati Wealth Management Firm

Wide Range of Financial Capabilities

For many clients, finding the best financial advisor in Cincinnati often means finding a firm that can address multiple financial needs at once.

To meet the ever-growing needs of their clients, The Asset Advisory Group offers a wide range of financial services and capabilities, including:

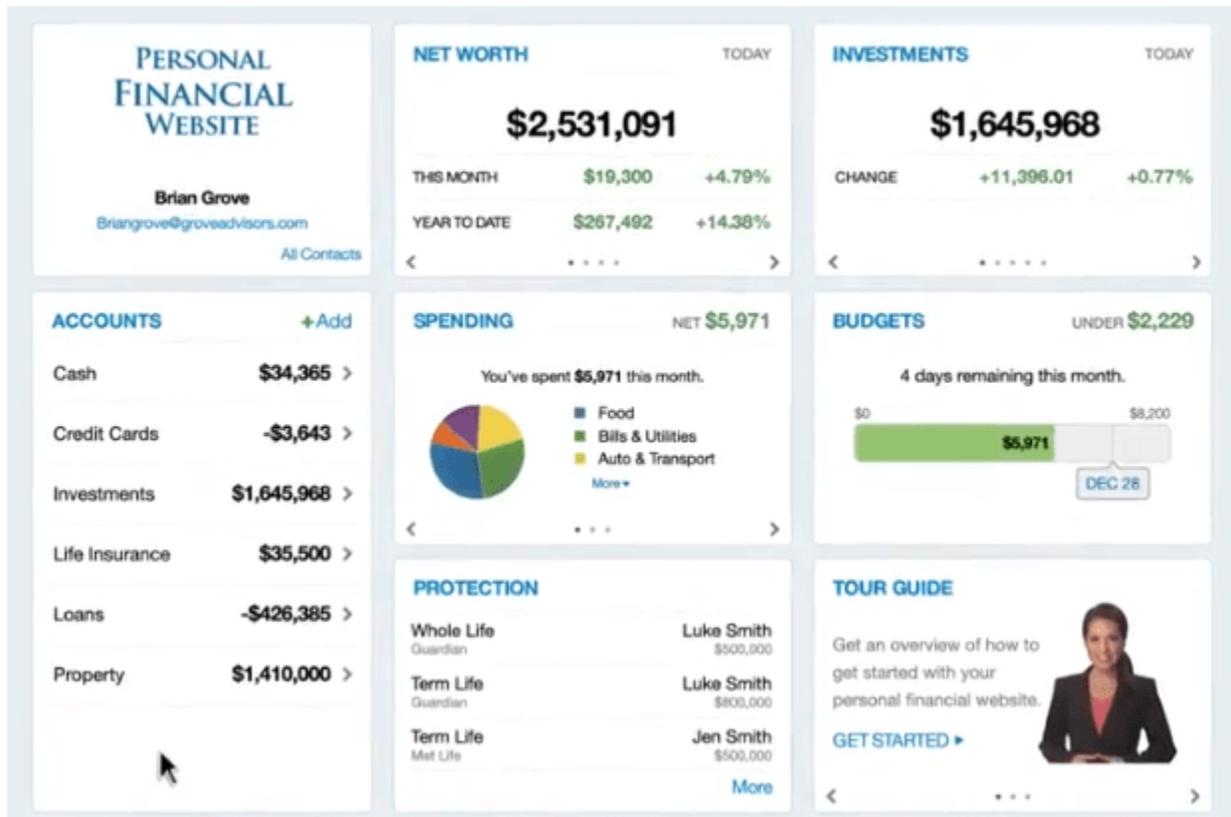
- Financial Coaching
- Investment Planning
- Cash Flow
- Tax Planning
- Risk Management
- Retirement Planning
- College Planning
- Estate Planning

TAAG 360° Dashboard

As a top Cincinnati financial planner, The Asset Advisory Group provides clients with 24/7 access to their financial health through the TAAG 360° dashboard. With this software, clients can access their personal dashboard on mobile or desktop to:

- View current balances of TAAG accounts, bank accounts, loans, credit cards, and more
- Send, store, and access documents
- View spending trends across all accounts
- Create monthly budgets

- Monitor the daily impact of changes
- Track net worth over time



The Asset Advisory Group

Rating Summary

As a fee-only firm with a fiduciary commitment, The Asset Advisory Group provides clients with transparent fees and open communication, two key elements in any successful financial planning relationship.

For new clients, the firm also provides two complimentary, no-obligation meetings to discuss financial needs and evaluate whether the relationship is a good fit.

With an innovative financial dashboard, an experienced, personable team, and a wide range of services, The Asset Advisory Group is one of the best Cincinnati financial advisors to consider partnering with this year.

Total Wealth Planning Review

For over 25 years, [Total Wealth Planning](#) has been serving clients throughout the country as an independent, [fee-only](#) financial advisor in Cincinnati.

Clients come from a variety of backgrounds, including business owners, corporate executives, wealth-building families, and retirees.

Key Factors That Enabled Total Wealth Planning to Rank as Top Cincinnati Wealth Management Firm

The Investment Process

Total Wealth's investment philosophies are based upon Nobel Prize-winning academics. This Cincinnati wealth management firm provides investment opportunities in 15-20 different asset classes, all with relative correlation to each other.

In addition to managing risk, creating wealth through opportunistic profit taking, tax loss harvesting, and rebalancing are integral parts of managing your investments.

Globally-arrayed, institutional quality mutual funds and EFTs (exchange-traded funds) are beneficial additions to your portfolio and will be discussed during the planning process.

Client-Centric Values

As one of the best financial advisors in Cincinnati, Total Wealth Planning adheres to a strong set of values that place clients first and foremost. These values include:

- **Outstanding Client Experience**—The firm emphasizes respect and confidentiality when establishing client relationships
- **Independence**—All advice is clear, objective, and most importantly, unbiased
- **Clients First**—Each Cincinnati financial advisor adheres to the fiduciary standard of client care and transparency
- **Sincerity and Truthfulness**—Establishing long-term relationships means prioritizing passion, empathy, and integrity



Total Wealth Planning

Rating Summary

As a fee-only Cincinnati wealth management firm, Total Wealth Planning has believed that advice should be given with the client in mind, not propelled by commission-based incentives.

As a result, clients can trust that their Cincinnati financial planner will uphold the highest standards of transparency, instilling trust and supporting long-term relationships.

With a solid range of financial planning services and a client-centric commitment, Total Wealth Planning is one of the best financial advisors in Cincinnati to consider partnering with this year.

Conclusion – Top 11 Financial Advisory Firms in Cincinnati, Ohio

Garnering a better understanding of the inner workings of a wealth manager or financial advisor in Cincinnati firm will instill confidence and make you feel more at ease with your decision-making process.

You've worked hard to get to where you are. Now, you simply have to take an objective approach and decide what specific services you need from a Cincinnati wealth management firm.

Are you heading into retirement? Is your family counting on you to safeguard their future? Perhaps you've come into a recent inheritance and need help in making sound financial decisions?

Whatever the case may be, one of the best things you can do is make a list of what it is that you want and use that list to align yourself with a Cincinnati financial advisor that offers the same services.

Once you've narrowed down our list of the top financial advisors in Cincinnati, Ohio, your next step is to see if they offer a free consultation by phone or in person. This is a great way to start a working relationship and get answers to your questions related to your specific financial situation.

The process may seem intimidating, and you may not find the perfect advisor right away, but with knowledge on your side, rest assured that there's a Cincinnati financial advisor out there for you.

Rate Table Disclaimer

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

Image sources:

- <https://bartlett1898.com/team/investment-advisors/>
- <https://www.bigstockphoto.com/image-93383303/stock-photo-cincinnati-downtown-overview>
- <https://www.fosterandmotley.com/financial-planning-investment-management>
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