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# 10 Best Financial Advisors & Wealth Management Firms in Chicago, IL | 2018 Ranking

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## RANKING & REVIEWS BEST CHICAGO FINANCIAL ADVISORS

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### **Intro: 2018 Ranking of the Top Financial Advisors in Chicago, Illinois**

Finding a reputable, respected, and expert Chicago wealth management firm is key to a strong overall financial present and future.

With that said, however, there are so many financial advisors in Chicago that it can be frustrating to try to sort through them all just to find even a few that you can trust.

After all, where can you find a Chicago financial advisor that specializes in tax-efficient portfolios? How will you know if you're getting a financial advisor that is also a Registered Investment Advisor?

In Chicago, the options can feel endless, and the search can become overwhelming. However, before you take even one step toward your goal of finding reputable financial planners in Chicago, you need to know what to look for.

It's what financial advisors in Chicago tell you about their processes, fee structures, and levels of transparency, among other things, that matter most.

This ranking of the top financial advisors in Chicago and Chicago wealth management firms focuses primarily on fee-only firms, which means these firms are not affiliated with any larger organization or brokerage, so their advice is completely unbiased and objective.

While this is the top-ranking factor, there are also a few fee-based Chicago financial advisors on this ranking. These Chicago financial advisors were included because, despite that fee structure, they still excel in terms of their reputation, level of service, and their client-first approach.



*Award Emblem: Best Financial Advisors in Chicago, Illinois*

## Top 10 Best Chicago Financial Advisors | Brief Comparison & Ranking

Best Chicago Financial Advisors	Highlighted Features	Ratings
Chicago Partners Wealth Advisors	Comprehensive 5-step process	5
D3 Financial Counselors	Team carries an impressive range of professional certifications	5
Financial Solutions Advisory Group	Firm specializes in having a low client-to-advisor ratio	5
Private Vista	Community oriented financial services for women	5

Savant Capital Management	Savant Portfolios for people with smaller portfolios or who are new to investing	5
The Mosaic Financial Group	Works with individuals, families, and businesses	5
The Planning Center	Psychology & behavioral finance	5
Timothy Financial Counsel, Inc.	Features hourly fee options and no account minimum	5
DeRose Financial Planning	Provides financial planning services for women	3
FourStar Wealth Advisors	Follows the Build-Live-Share investment & wealth management philosophy	3

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

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## **Tips for Selecting the Best Chicago Financial Advisors**

When it comes to choosing the best Chicago financial advisor, 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 Chicago 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 Chicago, each Chicago financial advisor 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 Chicago financial advisor that offers a broader range of services.

Once you've narrowed down your choices to a select few of these top-ranking Chicago wealth managers, 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 Chicago before committing to their services.



### *Best Financial Planners in Chicago*

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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 – Best Financial Advisors in Chicago**

Below, please find a detailed review of each firm on our list of top advisors and financial planners in Chicago. We have highlighted some of the factors that allowed these Chicago financial advisory firms 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.

- [Chicago Partners Wealth Advisors](#)
- [D3 Financial Counselors](#)
- [DeRose Financial Planning](#)
- [Financial Solutions Advisory Group](#)
- [FourStar Wealth Advisors LLC](#)
- [Private Vista](#)
- [Savant Capital Management](#)
- [The Mosaic Financial Group](#)
- [The Planning Center](#)
- [Timothy Financial Counsel](#)

Click below for previous years' rankings:

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

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## Chicago Partners Wealth Advisors Review

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[Chicago Partners Wealth Advisors](#) is one of the leading financial advisory firms in Chicago, managing \$1.5 billion for individuals as well as families and institutions.

Chicago Partners is a [fee-only](#) independent advisory firm with a fiduciary commitment, increasing trust and transparency as a Chicago financial advisor.

### **Key Factors that Enabled Chicago Partners to Rank as a Top Chicago Financial Advisor**

#### **Independent Advice**

Chicago Partners is a truly independent Chicago financial advising firm because their advisors don't receive compensation for recommending certain investment products.

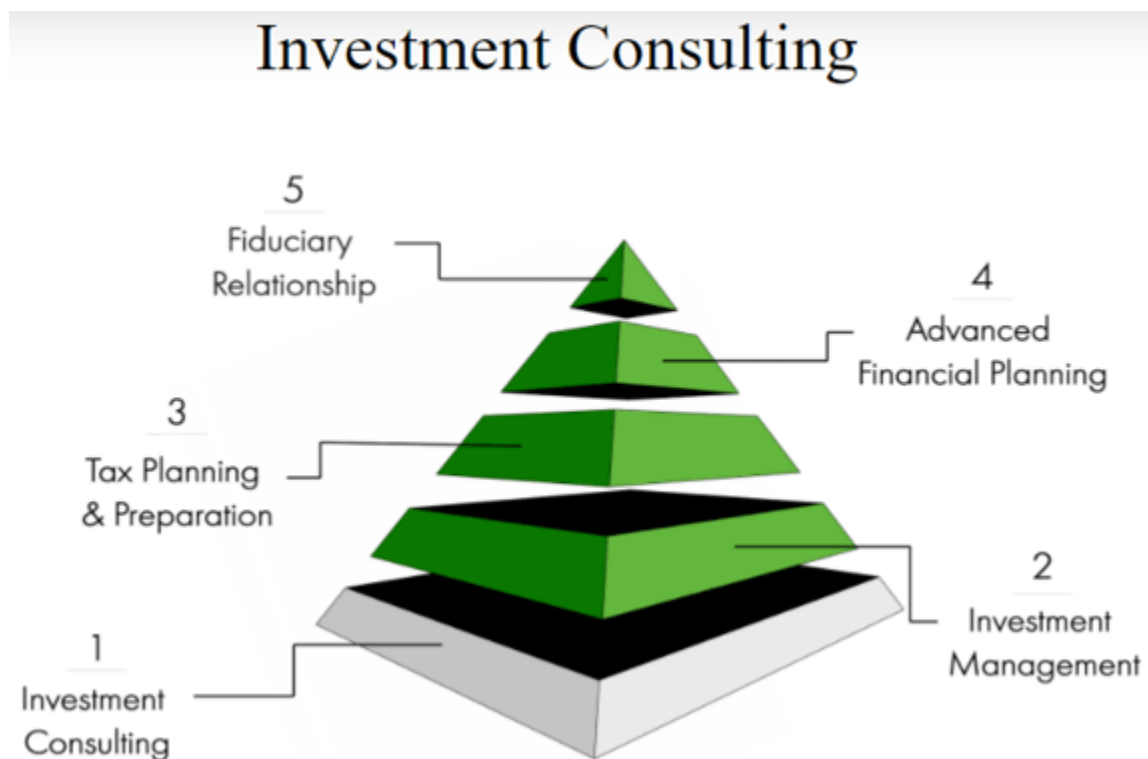
The professionals at Chicago Partners operate as fiduciaries on behalf of their clients, and they always put their best interests at the forefront of everything they do.

Because of the independent structure of this financial advisor in Chicago, investment recommendations focus on things such as low-cost institutional class shares of mutual funds and other options that deliver the desired results.

#### **5-Step Process**

As one of the top Chicago financial advisors, Chicago Partners offers clients a comprehensive 5-step process to wealth management and financial planning. These steps include:

- Investment Consulting—Understanding each client’s goals, risk profile, and unique portfolio construction.
- Investment Management—Your Chicago financial advisor will build a diversified portfolio and monitor progress to ensure that financial goals will be met.
- Tax Planning & Preparation—Focuses on overall tax efficiency to ensure that after-tax gains are maximized.
- Advanced Financial Planning—Monitor every aspect of your financial life through custom projections, estate plans, an expanded line of credit, mortgage solutions, and more.
- Fiduciary Relationship—Clients have ongoing access to a Fiduciary Registered Investment Advisor (RIA) to ensure that they receive unbiased advice.



*Chicago Partners Wealth Advisors*

### **Rating Summary**

As an independent, fee-only firm with a fiduciary commitment, Chicago Partners Wealth Advisors embodies the ideal relationship with a financial advisor in Chicago.

Not only can clients trust that all recommendations are made with their best interest in mind, but they also benefit from knowing exactly what they will pay, eliminating costly surprises down the road.

Additionally, their comprehensive 5-step process reflects industry expertise and a deep desire to sustain positive client relationships, solidifying the firm's 5-star rating as a top Chicago financial advisor.

**See Also:** [\*Best Financial Advisors in D.C., Maryland, and Virginia \(Tri-State\)\*](#)

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## **D3 Financial Counselors Review**

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[D3 Financial Counselors](#) is one of the best wealth management firms in Chicago, due in part to its high fiduciary standards and conflict-free structure.

Specializing in financial planning, estate planning, and portfolio management, D3 aims to help clients reach investment goals while making sound financial decisions.

### **Key Factors that Enabled D3 Financial Counselors to Rank as a Top Chicago Financial Advisor**

#### **Complete Transparency**

D3 Financial Counselors is not the kind of financial advisor to push products or extra services on you with additional costs.

It neutralizes any potential conflict of interest by completely removing commission-based payment structures, making it one of the leading overall financial advisory firms in Chicago, as well as one of the best fee-only options.

This means that you can work with D3 knowing that your financial advisor will not push anything extra on you for his/her own compensatory gain, working only with your best interest in mind.

#### **Financial Direction Plus Education**

Not only do D3 financial advisors focus on educating their clients on the pros and cons of their financial decisions, but they also make sure that they keep themselves in the know as well.



The financial advisory world changes rapidly, and the education that financial advisors received months ago may not be as relevant today.

To keep up with developing trends and financial needs, D3 keeps a wealth of knowledgeable, educated financial experts with a range of professional designations on staff. This includes:

- Certified Financial Planner®
- Certified Public Accountant
- Personal Financial Specialist
- Chartered Financial Analyst®
- Certified Investment Management Analyst®
- Certified Specialist in Estate Planning
- Accredited Wealth Management Advisor<sup>SM</sup>
- Chartered Retirement Planning Counselor<sup>SM</sup>

### **Rating Summary**

For clients that need an experienced, well-credentialed financial advisor in Chicago, D3 Financial Counselors is a great fit.

The firm's focus on ongoing education strikes a crucial differentiator between competing firms, as not many firms have so many professional members on staff.

With an impressively diverse range of professional certifications, the Chicago financial advisors at D3 are well-poised to handle a variety of financial situations, making D3 Financial Counselors one of the top wealth management firms in Chicago.

***Don't Miss: [Top Financial Advisors in Oklahoma City & Tulsa, Oklahoma](#)***

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## **DeRose Financial Planning Group Review**

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[DeRose Financial Planning Group](#) was founded by Karen L. DeRose and focuses on implementing a disciplined and structured investment approach that minimizes clients' risks. All told, financial planning and advisory has been the family business for nearly six decades.

As a part of Lincoln Financial Advisors, DeRose is a [fee-based](#) Chicago wealth management firm.

While we generally focus our rankings on fee-only financial advisors, DeRose was included because of their long history in the business, well-defined planning approach, and their reputation.



## **Key Factors that Enabled DeRose Financial Group to Rank as a Top Chicago Financial Advisor**

### **A Holistic Approach to Investing**

Rather than focusing on one aspect of your investments or planning philosophy, DeRose Financial Planning Group takes a holistic approach. This approach is broken down into six separate steps:

- Collaborating with clients to lay the groundwork for return and risk based on their overall plan, risk tolerance, and unique investment goals
- Constructing asset allocations together with clients, designed around personal investment objectives and tax considerations
- Selecting experienced asset managers with demonstrated ability to create an investment plan
- Proactively monitoring each element to control risk and implement policies
- Sending clients full reports on fees, performance, and risk
- Rebalancing portfolios annually and making changes as needed

### **Wide Range of Financial Planning Services**

Although the staff of Chicago financial advisors at DeRose may be smaller than competing firms, their expertise allows them to tackle a wide range of financial planning services, including:

- Retirement Planning—Keeping clients on track with retirement goals
- Education Planning—529 plans, pre-paid tuition plans, custodial accounts, and financial aid planning
- Wealth Protection—Life insurance, disability insurance, and long-term care
- Estate Planning—Wills, trusts, family-gifting strategies, charitable planning, and more
- Children & Money—Instilling good financial habits in children
- Women & Planning—Empowering women to take charge of their financial future

Each financial planning service is diverse and well-detailed, making it easy for clients to determine which financial planning service is best-suited for their needs.



*DeRose Financial Planning Group*

### **Rating Summary**

For both investment management and financial planning, a continual theme for DeRose Financial Planning Group is one-on-one collaboration with clients.

This is a great feature to look for in a Chicago financial advisor, as it helps clients know that they are valued, supported, and heard.

However, although the firm brings decades of experience and expertise in Chicago wealth management, DeRose is not as transparent as competing firms on our list. Our review was unable to find any mention of fee structure on their website, which may make it difficult for potential clients to fully evaluate the firm.

Additionally, while a fiduciary commitment is a great move for any advisor, acting as a fiduciary is even more important for fee-based advisors. This ensures clients that any recommended financial products are provided in their best interest, rather than in the interest of added fees and commission.

By clarifying their fee structure and taking on a fiduciary commitment, DeRose could easily improve their rating to a full five stars.

***[Related: Best Financial Advisors in Iowa \(Des Moines, Ames, Dubuque, and Davenport\)](#)***

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## **Financial Solutions Advisory Group Review**

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[Financial Solutions Advisory Group](#) provides financial planning and wealth management services to high-net-worth individuals and families.

As one of the best financial advisors in Chicago, Illinois, Financial Solutions Advisory Group is a [fee-only](#) financial planner, meaning that that it doesn't make commission from recommended services or products.

### **Key Factors that Enabled Financial Solutions Advisory Group to Rank as a Top Financial Advisor in Chicago**

#### **Client-Centric Philosophy**

One of the first things that any potential client should do while evaluating a firm is to see if a Chicago financial advisor's values are in line with their own.

Financial Solutions maintains an approach that is strongly centered around meeting client needs through:

- [Balancing Risk & Opportunity](#)—Using a disciplined platform for wealth management and financial planning to avoid emotional decisions and mitigate excessive risk
- [Minimizing Taxes](#)—Offsetting gains with losses and employing a low turnover approach to minimize the impact of taxes
- [Exercising Independence](#)—These Chicago financial advisors do not earn commissions, trailers, or kickbacks, offering the independence to choose products that fully benefit each client
- [Personal Relationships](#)—Establishing a partnership with clients is key, meaning that Financial Solutions employs one-on-one service, ongoing communication, and regular, in-person meetings

#### **Low Client-to-Advisor Ratio**

Financial Solutions Advisory Group prides itself on its low client-to-advisor ratio. By keeping a manageable number of clients assigned to each advisor, Financial Solutions Advisory Group ensures that you will receive the utmost in client service and attention throughout the investment process.

This also guarantees that your portfolio will be managed regularly and with a high degree of personalization to make sure that your financial needs are being met.

As a result of the firm's low client-to-advisor ratio, this Chicago wealth management firm is able to provide consistent, in-person meetings to review portfolio allocations and make necessary changes to help clients better reach their goals.

### **Rating Summary**

As an independent fiduciary, clients can trust that Financial Solutions Advisory Group will always put client needs first and foremost.

This type of trust is a valuable asset in the financial industry, particularly for firms like Financial Solutions that cater to high-net-worth individuals and families.

With a low client-to-advisor ratio and a philosophy based on collaboration and partnership, Financial Solutions Advisory Group is one of the best financial advisors in Chicago to consider partnering with this year.

**Popular Article:** [\*Top Independent Financial Advisers in the UK \(Top IFAs\)\*](#)

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## **FourStar Wealth Advisors LLC Review**

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Although we typically rank fee-only firms, [FourStar Wealth Advisors](#) has been included as a [fee-based](#) firm due to their strong commitment to independence.

FourStar also provides great value for their clients through approaching financial management in a way that creates long-term relationships, supporting collaboration and financial success.

### **Key Factors that Enabled FourStar Wealth Advisors to Rank as a Top Chicago Financial Advisor**

#### **"Build-Live-Share" Philosophy**

The core philosophy of FourStar Wealth Advisors centers on a "Build-Live-Share" ethic. FourStar helps clients "build" their wealth over the long haul.

This is accomplished through regular monitoring of your portfolio, applying changes when needed, and helping you in whatever way that it can to adhere to the plan's implementation.

After the build phase has wrapped up, this top Chicago financial advisor believes that it is time for you to "live." This is the retirement phase when you will be living off your earnings while creating very little or no new income.

FourStar wants to help you experience a vibrant "live" stage. To this end, it makes recommendations on the appropriate sources from which to draw funds so as not to upset the balance of your portfolio.

The "share" phase can occur both during the "live" stage and beyond. As a top-rated financial planner in Chicago, FourStar helps identify key charitable opportunities aligned with your interests and values while maximizing your donations' contributions to your overall savings.

In addition to charity, FourStar can assist in the transfer of wealth between generations when the time is appropriate.

### **Educational Resources**

In keeping with their drive to collaborate and create partnerships with their clients, FourStar Wealth Advisors places a strong emphasis on empowering clients to improve their financial literacy.

Located directly on the firm's website is a wide range of educational resources, including:

- Articles
- Videos
- Local Events
- Podcasts
- Blogs

Not many Chicago financial advisors provide such a diverse array of resources to their clients, making FourStar stand out as a top Chicago financial planner.

### **Rating Summary**

Compared to other financial advisors in Chicago, FourStar Wealth Advisors has one of the most comprehensive and dynamic philosophies, making them an excellent choice for clients that want a holistic approach to their financial health.

However, when it comes to specific financial services, FourStar falls short by providing the bare minimum of detail. This could make it difficult for potential clients to fully evaluate the value of each service, resulting in a 3-star rating overall.

***Read More: [Best Financial Advisors in Vancouver, BC, Canada](#)***

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## Private Vista Review

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[Private Vista](#) is a fee-based financial planning firm in Chicago. Although we tend to prefer ranking fee-only advisors, we chose Private Vista for their fiduciary commitment and personalized approach to financial management.

### **Key Factors that Enabled Private Vista to Rank as a Top Chicago Financial Advisor**

#### **Financial Services for Women**

Part of what makes Private Vista one of the top wealth management firms in Chicago is their dedicated focus to providing dynamic financial services for women.

Whether a client is going through a life transition—like divorce and widowhood—or don't have the time or confidence to plan their financial future, Private Vista prides itself on providing a welcoming environment.

Uniquely, this top Chicago financial advisory firm helps support ongoing financial literacy through [Project Venus™](#), an endeavor which aims to create a community where women are “connected, supported and inspired to enrich their lives through financial planning, education and partnership.”

Financial tools and opportunities available to women through Project Venus™ include:

- Workshops
- Educational events
- Social events
- Newsletters
- Private consultation

#### **Fiduciary Commitment**

As a fee-based Chicago financial advisor, having a fiduciary commitment is essential to differentiating from the competition and establishing value.

For many clients, it can be difficult to put full trust into a fee-based financial advisor, since the potential for conflicts of interest is much more likely when considering commissions, kickbacks, and additional fees.

With a [fiduciary commitment](#), Private Vista dispels any concerns that clients may have, as they are legally obligated to:

- Provide unbiased advice
- Exercise a high degree of care and diligence
- Disclose any conflicts of interest in writing

## **Rating Summary**

Not many fee-based Chicago financial advisors also operate by the fiduciary standard, making Private Vista stand out among competing firms.

Of particular interest is their commitment to creating a supportive community within their financial services for women.

While financial services for women may be growing in popularity, this type of personalized focus is unique, earning Private Vista a 5-star rating among the best financial advisors in Chicago.

***[Related: Top Financial Advisors in San Antonio and New Braunfels, Texas](#)***

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## **Savant Capital Management Review**

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[Savant Capital Management](#) is an independent, fiduciary financial advisor in Chicago, helping clients throughout Illinois since 1986.

As a [fee-only](#) Chicago financial planner, Savant aims to help clients maximize their investments while safeguarding themselves and their assets during the journey.

### **Key Factors that Enabled Savant Capital Management to Rank as a Top Chicago Financial Advisor**

#### **Assessment-Based Approach**

As one of the best financial advisors in Chicago, it not only wants to grow your portfolio, but it also wants to help you plan and save for life's unpredictable events.

To this end, Savant asks you to complete *The Ideal Futures Financial Health Assessment<sup>SM</sup>* to help get a better idea of where you are in life and how to help you move forward.

This proprietary process covers 10 key planning areas that represent Savant's core financial planning philosophy:

- Vision & Goals



- Retirement Planning
- Risk Management & Asset Protection
- Debt Management
- Education Planning
- Income Tax Planning
- Investment Planning
- Estate Planning & Administration
- Business Planning & Succession
- Charitable Planning

After completing this initial process, Savant has two additional assessments to help clients identify goals, create customized financial plans, and bring organization to their finances, called *The Building Ideal Futures Process™* and *The Ideal Futures Portfolio™*.

### **Targeted Audience**

Savant Capital Management focuses on high-net-worth individuals who want to preserve their hard-earned capital and pursue steady, wise growth.

However, more than most financial advisors in Chicago, Savant also provides some leeway in allowing you to meet the necessary criteria for becoming a client. One of these criteria must be met:

- Projecting a portfolio valuation of \$500,000 or more within the next 12 months
- Expecting a portfolio of \$1,000,000 by the end of 5 years
- Immediate family member of an existing Savant client with a portfolio of more than \$5,000,000
- Paying a \$5,000 minimum annual fee to cover investment management services

Another great aspect of Savant Capital Management is its expanded reach. It not only has clients in Illinois, but also in nearly every state across the country.

### **Rating Summary**

As a fee-only Chicago financial planner, Savant Capital Management puts a strong emphasis on transparency and trust.

The firm welcomes phone calls to request additional information on their fee structure, and also provides no-obligation [consultations](#) for potential clients to receive a complimentary assessment.

With three detailed, proprietary approaches to wealth management and financial planning, Savant Capital Management is one of the best financial advisors in Chicago to consider partnering with this year.

***Don't Miss: [Top Financial Advisors in Greensboro, Chapel Hill, and Winston-Salem, North Carolina](#)***

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## **The Mosaic Financial Group Review**

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[The Mosaic Financial Group](#) is a fee-only, fiduciary, and independent financial advisor in Chicago.

With services offerings including investment advisory, tax planning, financial planning, and more, The Mosaic Financial Group is a one-stop shop of financial planning and wealth management.

### **Key Factors that Enabled The Mosaic Financial Group to Rank as a Top Financial Advisor in Chicago**

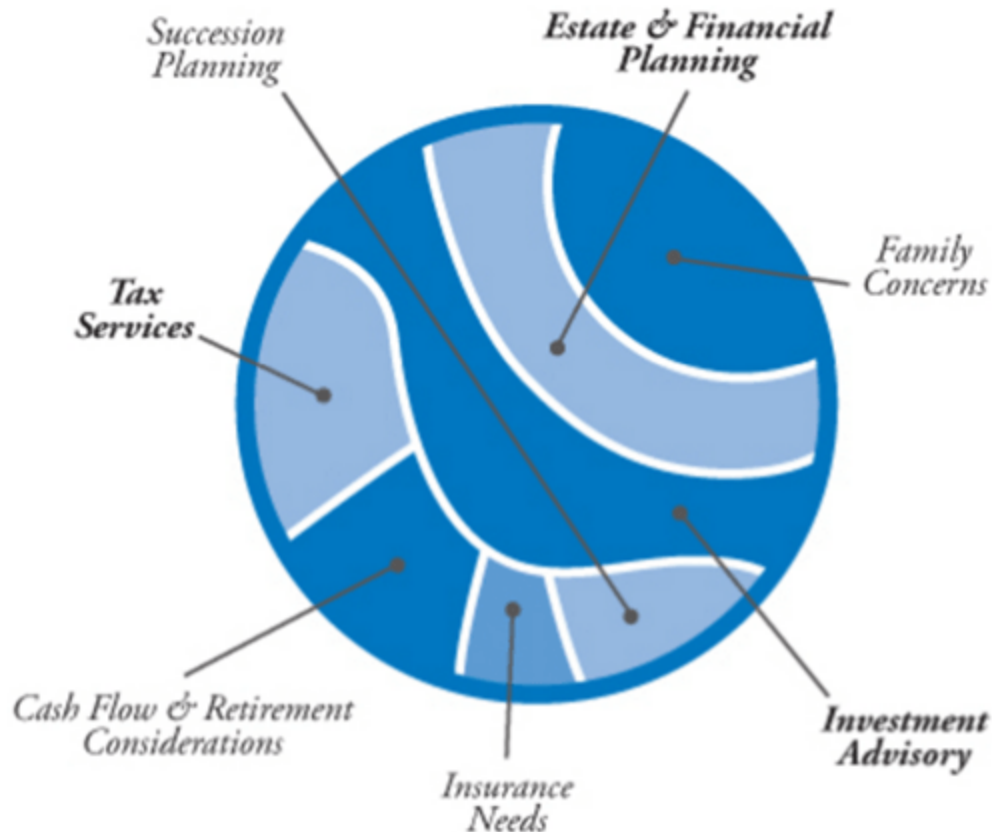
#### **A Total Service Package**

Like the other top financial advisors in Chicago that appear on this list, Mosaic Financial Group puts your interests and well-being at the front and center of every move it makes.

However, unlike many of the other Chicago financial advisors, Mosaic seeks to offer each client a well-rounded service package wherein the individual services complement and even strengthen each other.

For instance, Mosaic considers the tax implications of your estate planning, succession planning, and even retirement planning. From there, it offers services designed to lessen your tax burden by making your overall strategy more tax-efficient.

The same holds true for how Mosaic considers each client's investment advisory, family concerns, financial planning, and insurance needs. By utilizing as many of their services as possible, this Chicago financial advisor can strengthen and harmonize your wealth management plan across the board.



*Mosaic Financial Group*

### **Unified Team Approach**

As a top Chicago financial advisor, Mosaic boasts a number of professionals with qualified designations to their name. Some of these include investment specialists, Certified Public Accountants, and Certified Financial Planners, among others.

Mosaic leverages the many "hats" worn by team members into a powerful group management approach. More than one set of qualified eyes review each individual portfolio, with every team member contributing as much as they can.

In this way, Mosaic Financial Group helps build investment strategies that are soundly backed by the firm's collective expertise.

### **Rating Summary**

When it comes to finding the best financial advisor in Chicago for you, many clients need an approachable firm, where they can freely ask questions and communicate their concerns at any time.

The Mosaic Financial Group actively encourages clients to bring their questions or concerns—without the fear of being billed by the minute or trapped in a voice-mail system—emphasizing the firm’s openness and approachability.

Combined with comprehensive, seamless service offerings and a team-based approach, the accessibility of Mosaic makes them into one of the most competitive options on our list, earning the firm a 5-star rating overall.

***Popular Article: [Best Financial Advisors in Austin, TX \(RIAs, Wealth Managers, Planners\)](#)***

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## **The Planning Center Review**

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Established in 1998, [The Planning Center](#) is a fee-only fiduciary, delivering unbiased advice and sound investment strategies to clients in the Chicago area.

The firm also has locations in Alaska, California, New Orleans, Minnesota, and the Quad Cities (Iowa/Illinois), bringing together 232 years of combined experience.

### **Key Factors that Enabled The Planning Center to Rank as a Top Financial Advisor in Chicago**

#### **Talented Team**

The team of Chicago financial advisors at The Planning Center is small but diverse, with each member bringing a range of professional credentials and affiliations. These include:

- Certified Financial Planner (CFP®)
- Certified Financial Transitionist (CeFT®)
- Registered Paraplanner (RP)

Uniquely, along with three partners, the Chicago team of financial advisors also includes a psychologist, allowing clients to benefit from an approach that includes psychology and behavioral finance.

For clients that experience anxiety, frustration, or depression about financial matters, this type of support is a great way to improve the financial planning and retirement savings experience.

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

As a top financial advisor in Chicago, The Planning Center offers clients a wide range of services to choose from.

Built from a foundation of helping clients feel confident in their financial future, these services include:

- Asset & Debt Management
- Cash Flow & Income Management
- Investment Management
- Asset Protection & Preservation
- Estate Planning
- Philanthropy
- Tax Management
- Accumulation & Retirement Planning

Each service has multiple steps and detailed descriptions, increasing transparency and making it easy for clients to see the value that this top Chicago financial advisor can offer.



*The Planning Center*

## **Rating Summary**

As a fee-only fiduciary, The Planning Center exemplifies what a truly unbiased, client-centric Chicago financial advisor should be.

Not only can clients trust that their best interests will always be sought after, but they can also rest assured that their team of Chicago financial advisors will do so with full transparency.

With comprehensive services, a talented team, and the benefit of adding psychology and behavioral finance strategies, The Planning Center is one of the best financial advisors in Chicago to consider partnering with this year.

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## Timothy Financial Counsel Review

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In business since 2000, [Timothy Financial Counsel](#) is one of the best financial advisors in Chicago, Illinois, thanks in part to its fee-only structure and conflict-free approach.

Unlike other Chicago financial advisors, Timothy Financial Counsel only offers financial planning services on an hourly basis, providing a simple approach to billing that many clients appreciate.

### **Key Factors that Enabled Timothy Financial Counsel to Rank as a Top Chicago Financial Advisor**

#### **Unique Hourly Rate**

Among financial advisors in Chicago and beyond, Timothy Financial Counsel stands out as being one of the only firms to provide financial planning advice on an hourly basis.

Hourly fee rates are subsequently determined according to the number of services you will be utilizing, the type of services, and the specific advisor to whom you are assigned.

Clients are billed for exact time spent—if you have a 5-minute phone call with your Chicago financial advisor, you will be billed for five minutes based off your hourly rate.

While some clients might not like the idea of paying for phone calls of any length, Timothy's hourly fee approach guarantees the utmost in transparency. You will never be surprised by extraneous charges while working with Timothy Financial Counsel.

Additionally, while the image below reflects pricing for service bundles, this top financial advisor in Chicago also offers individual stand-alone services and open-ended [hourly advice](#), giving clients a wide range of billing options to choose from.



*Timothy Financial Counsel*

**An Entire Office Working for You**

Not all financial advisors in Chicago dedicate a team to review your portfolio and investment plan. In fact, many advisory firms assign you to a single advisor while utilizing another department as necessary, such as taxes, accounting, retirement, and the like.

However, when you do business with Timothy Financial Counsel, you engage with a smaller office with a low client-to-advisor ratio. This enables Timothy Financial Counsel to dedicate each Chicago financial planner to the task of crafting your unique financial plan.

It is rare for an entire team to work on balancing your portfolio at once, but Timothy Financial Counsel promises just that throughout the process of originating your plan.

**Rating Summary**

For many clients, the unique hourly structure of Timothy Financial Counsel is a refreshing change.



Not only does it give clients more control over what they spend on Chicago wealth management, but it also provides additional transparency, enhancing trust between clients and their Chicago financial advisors.

When considering the firm's unique pricing structure, flexible plans, fee-only commitment, and team-based approach, there's no doubt that Timothy Financial Counsel is one of the best—and most accessible—financial advisors in Chicago.

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## **Conclusion - Top 10 Best Financial Advisors in Chicago, Illinois**

There is something for everybody on our list of top financial advisors in Chicago, Illinois.

While many of these Chicago wealth management firms cater to high-net-worth individuals and families, there are also options for people of average wealth and means. There are financial planners in Chicago to help people at every income level make it through the tough times, as well as the maximizing the good ones.

If you're thinking about hiring one of the top Chicago wealth management firms or Chicago financial advisors, it would pay to consider your goals for the future, since this will be one of the first questions from any Chicago financial planner.

Consider these questions to help yourself clarify how a financial advisor in Chicago can best help you: What do I want to accomplish by investing and saving? What is truly important to me and my family? How do I want to provide for the ones that I love?

No matter which financial planner in Chicago you choose, know that you are starting a new chapter just by beginning your search—your financial well-being and peace of mind are certainly worth it!

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## **Rate Table Disclaimer**

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