

---

# **11 Best Financial Advisors & Investment Management Firms in Toronto, Canada | 2018 Ranking**

---

## **2018 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN TORONTO**

---

### **2018 Ranking of the Top Financial Planners & Best Financial Advisors in Toronto, Canada**

Finding a financial advisor in Toronto, Canada, is easy, but finding the *right* Toronto wealth advisor for you and your family is a much harder task.

The sheer quantity of financial advisors and wealth management firms in Toronto increases the challenges that Canadian consumers face when selecting one.

By developing a clear awareness of what you are looking for and doing proper research, the answers to the following questions will soon become clear:

- Who are the top financial advisors in Toronto, Canada?
- Where should I go if I am looking for additional services, like investment management, estate planning, and tax reduction?
- What types of fees do financial advisors in Toronto, CA, charge?
- Which financial advisor is best for me?

While the final decision rests in your hands, we have assembled a list of the top financial advisors in Toronto, Canada to give you a leg up on your way to financial success.



*Award Emblem: Top 11 Best Financial Advisors in Toronto, Canada*

## **Top 11 Best Financial Advisors & Planners in Toronto, Canada in 2018 | Brief Comparison & Ranking**

<b>2018 Best Toronto Financial Advisors</b>	<b>Highlighted Features</b>	<b>2018 Ratings</b>
Caring For Clients	Woman-owned and operated	5
Cumberland Private Wealth	Highly certified team of advisors	5
De Thomas Wealth Management Corp	Works to minimize fees whenever possible while remaining objective	5
HighView Financial Group	Operates as an outsourced CIO	5
Newport Private Wealth Inc.	One of the largest independent wealth management firms in Canada	5
PWL Wealth Management Inc.	Integrated approach to wealth management	5
Stewart & Kett Financial Advisors	“Advice-only”, meaning they only charge clients by the hour or by retainer	5

Tacita Capital Inc.	Advice based on the Core and Satellite investment model	5
TriDelta Financial	Takes the “Family Doctor approach” which relies on specialized knowledge and advice	5
Frontwater Capital	Conducts independent research to fuel management decisions	3
Olympian Financial Inc.	Tactical Approach builds wealth in all economic environments	3

*Table: Top 11 Best Financial Advisors in Toronto, Canada | Above list is sorted by rating*

---

## **Tips for Selecting the Best Financial Advisors in Toronto in 2018**

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

As you will see in the following reviews for Toronto wealth management firms, each Toronto 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 Toronto financial planner that offers a broader range of services.

Once you’ve narrowed down your choices to a select few of these top-ranking Toronto 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 Toronto before committing to their services.



*Best Toronto Financial Advisors & Wealth Management Firms*

---

## **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 Financial Advisors in Toronto, Canada**

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

- [Caring for Clients](#)
- [Cumberland Private Wealth](#)
- [De Thomas Wealth Management Corp.](#)
- [Frontwater Capital](#)
- [HighView Financial Group](#)
- [Newport Private Wealth](#)
- [Olympian Financial, Inc.](#)
- [PWL Wealth Management, Inc.](#)
- [Stewart & Lett Financial Advisors](#)
- [Tacita Capital, Inc.](#)
- [TriDelta Financial](#)

Click below for previous years' rankings:

- **2016 Review:** [Top 11 Best Wealth Managers & Advisors in Toronto, Canada](#)
- **2017 Review:** [Top 10 Best Financial Advisors & Planners in Toronto, Canada](#)

---

## Caring for Clients Review

---

[Caring for Clients](#) is a wealth management firm in Toronto that prides itself on taking an integrative approach to financial planning, helping clients structure their finances from top to bottom.

As a “[fee for service](#)” Toronto financial advisor, all financial planning services at Caring for Clients are unbundled and paid for individually, meaning that clients can pick and choose exactly what services they want to pay for.

### **Key Factors That Enabled Caring for Clients to Rank as a Top Financial Planner in Toronto**

#### **Women Leaders in Business**

Rona Birenbaum founded Caring for Clients in 2000 with the intent to provide a full spectrum of wealth management services. Today, the firm employs a strong Toronto financial advisory team, which is composed primarily of women advisors and support staff.

In an industry where women are historically under-represented, a strong team of women advisors sets Caring for Clients apart as a Toronto financial advisor that is

committed to diversity and multiple perspectives, two characteristics that clients can deeply benefit from.

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

The diverse staff at Caring for Clients applies the wide range of financial perspectives and industry experience to a wide range of financial needs, including:

- **Initial Consultation**—Discussion of your current finances, expenses, and plans
- **Comprehensive Personal Plan (Individuals and Couples)**—Integrated review, evaluations, and comprehensive recommendations
- **Comprehensive Financial Plan (Business Owners)**—Includes additional expertise for the unique challenges faced by business owners
- **Retirement Planning**—Tax-efficient, worry-free approach to planning for retirement
- **Insurance Planning**—Develop strategies to minimize risk while growing wealth in a tax-efficient manner
- **Investment Planning**—Second-opinion service to evaluate an existing portfolio
- **Estate Planning**—Provides education on overcoming obstacles to create an efficient estate plan



*Caring for Clients - Toronto*

**Rating Summary**

As a top Toronto financial advisor, Caring for Clients offers a unique and transparent “fee for service” compensation structure, as potential clients can easily access a [detailed cost estimate](#) for various financial planning services.

With a strong commitment to driving client satisfaction through long-term financial planning relationships and high levels of transparency, Caring for Clients is one of the best financial advisors in Toronto to consider partnering with this year.

***See Also: Top Financial Advisors in Montréal & Ottawa, Québec, Canada***

---

**Cumberland Private Wealth Review**

---

Founded in 1997, [Cumberland Private Wealth](#) is an independent wealth management firm serving families, individuals, and foundations.

We could not confirm whether Cumberland Private Wealth uses a fee-based or fee-only structure. As always, we recommend verifying compensation before partnering with any Toronto wealth management firm.

## **Key Factors That Enabled Cumberland Private Wealth to Rank as a Top Financial Planner in Toronto**

### **Expert Portfolio Construction Process**

As a top Toronto wealth management firm, all Cumberland portfolios are created with six key elements:

- **Insight**—Secular trends, investment themes, geo-political events, and economic factors
- **Strategy**—Asset classes, themes, and regions
- **Conviction**—Disciplined, proven course to stay the course throughout fluctuating markets
- **Teamwork**—Toronto financial advisors at Cumberland share ideas and challenge each other's thinking for a collaborative process
- **Wisdom**—Investment managers have an average of 18 years of experience
- **Integrity**—Unbiased stock selection and independent research

### **Experienced Team**

For many clients, finding the best Toronto financial advisor means finding a group of accredited, experienced professionals that can tackle a variety of financial challenges.

As one of the top investment firms in Toronto, Cumberland employs a large team with an impressive range of industry certifications, including:

- FCA
- FCPA
- CFA
- CIM®
- CFA
- MBA
- CFP®
- FCSI

Many of these designations come with strict requirements for fiduciary duties and ongoing education, ensuring that clients receive advice that is both up-to-date and in their best interests.



## Rating Summary

As an employee-owned, independent Toronto wealth management firm, Cumberland Private Wealth provides clients with the knowledge that the success of the firm is directly aligned with that of their clients.

With regular investment insights and reviews, a highly certified team, and an investment process based on research and value, Cumberland Private Wealth is one of the best investment firms in Toronto to consider partnering with this year.

---

## De Thomas Wealth Management Corp. Review

---

Founded in 1987, [De Thomas Wealth Management Corp.](#) is an independent firm providing expert investment and wealth management services from eight locations across Canada.

We could not confirm whether De Thomas is a fee-only or fee-based Toronto wealth management firm. As always, we recommend confirming fee structure before partnering with any financial advisor in Toronto.

### **Key Factors That Enabled De Thomas Wealth Management Corp. to Rank as a Top Toronto Financial Advisor**

#### **Investment Process**

As one of the top investment firms in Toronto, the investment strategy at De Thomas Wealth Management Corp. is made up of three main components:

- Diversification
- Asset allocation
- Minimizing fees

First, your Toronto financial advisor will focus on diversification, creating a portfolio that includes a broad range of bond and security investments, ensuring that you won't become a victim of a volatile market.

Next, your Toronto financial advisor will focus on expert asset allocation. Each investment made on your behalf is well-thought-out, includes a long-term target, and is recalibrated as needed.

Last, your Toronto financial advisor at De Thomas will work to minimize your fees. The firm uses cost-efficient products that help save you money and minimize spending extra money on taxes as well.

### **Private Wealth Advisory Services**

Investors with portfolios of [\\$5 million or more](#) are eligible for Private Wealth services. This division offers wealthy investors the following benefits:

- Experience
- Personal approach
- Lower fees
- Safety
- Disciplined investment process
- Fully integrated solutions

Investment and wealth planning services are tailored to high-net-worth clients and are not limited to investment advice. Services are holistic and handled by a team of experienced advisors who get to know you personally and understand the factors at play for wealthy investors.

### **Rating Summary**

De Thomas is an independent advisory firm without ties to larger banks or financial institutions, a commitment which has remained since their founding in 1987.

With a focus on personalized, objective advice and a wide range of financial services, De Thomas Wealth Management Corp. is one of the best investment firms in Toronto to consider partnering with this year.

***Don't Miss: Best Financial Advisors in Vancouver, BC, Canada***

---

## **Frontwater Capital Review**

---

As one of the top investment firms in Toronto, [Frontwater Capital](#) is an independent, [fee-only](#) boutique firm serving successful entrepreneurs, professionals, and corporate executives.

While once limited to high-net-worth families on a client-referral basis only, Frontwater has recently opened their investment management services to new clients across the Toronto area.

## **Key Factors That Enabled Frontwater Capital to Rank as a Top Toronto Financial Advisor**

### **Option-Licensed Portfolio Managers**

Frontwater's expert knowledge of stock-option investing and risk management makes this firm stand out from the rest. It believes that traditional, "long-only" asset allocation investments used by most financial firms do not sufficiently protect investors from risk.

As such, the Toronto financial advisors at Frontwater utilize stock option investments to further protect investors and to maximize returns. This allows the firm to:

- Establish attractive entry points on a particular stock
- Lower average costs
- Institute opportunistic profit-taking
- Insure portfolios from potential market disaster

### **Independent Research**

Frontwater conducts independent research on the market before suggesting financial moves. This allows the firm to make decisions grounded on:

- Sound financial analysis
- Reliable fundamental data
- Quantitative stock selection techniques

This strategy allows Frontwater to use investment techniques, which are normally only accessible to large companies, and apply them to the portfolios of individual investors.

### **Rating Summary**

As an independent firm, Frontwater Capital is not tied to a large financial institution, meaning that their Toronto financial advisors are free to recommend the investments that will truly fit the needs of their clients.

While the firm excels in focusing on providing exclusive, personalized service, our review was unable to find any information regarding the qualifications, certifications, or professional history of the Toronto financial advisors on the Frontwater Capital team.

By expanding on the full capabilities of the financial advisory team, Frontwater Capital could easily improve both their value proposition to new clients and their rating as a top financial advisor in Toronto.

---

# HighView Financial Group Review

---

[HighView Financial Group](#) is a Toronto wealth management firm founded by Gary Brent and Mark Barnicutt in 2005.

While we could not verify the firm's fee structure, HighView does [state](#) that "fees are fully transparent on client statements and typically go down as a percentage of your portfolio as your assets grow."

As always, we recommend verifying compensation structure before partnering with any Toronto financial advisor.

## Key Factors That Enabled HighView Financial to Rank as One of the Top Toronto Wealth Management Firms

### Outsourced Chief Investment Officer Process

- **Investment Stewardship:** As one of the top investment firms in Toronto, HighView works with no conflicts of interest and considers only your needs.
- **Goals Assessment:** HighView strives to fully understand your investment goals, expected deadlines, and level of risk tolerance to create a truly customized portfolio.
- **Asset Management:** Based on your goals assessment, a team of Toronto financial advisors will keep a close eye on your portfolio and make any necessary changes.

### Working with Affluent Families

HighView specializes in services targeting the needs of affluent families for lifestyle management, retirement planning, funding education, and transfer of wealth. All services are provided from a value-driven foundation of:

- Collaborative decision-making
- Consistent portfolio reviews
- Open-door policy
- Fiduciary advisory services
- Financial education for you and your family

Operating with these values means that HighView will always put you first and will never leave you out of the decision-making process.

As one of the top investment firms in Toronto, HighView also offers vital education about the financial system and investment process, making the investment experience much smoother for you and your family.



### *Best Toronto Financial Planners*

#### **Rating Summary**

For investors, families, and foundations, HighView offers a dynamic, comprehensive portfolio management process, making them a competitive option among Toronto wealth management firms.

With a boutique approach, a highly certified team, and a fiduciary commitment, HighView is one of the best wealth management firms in Toronto to consider partnering with this year.

***Related: Top Financial Advisors in Calgary, Alberta***

---

## **Newport Private Wealth, Inc. Review**

---

Founded in 2001, [Newport Private Wealth](#) is a Toronto wealth management firm that prides itself on superior customer service and a holistic approach to managing investments and overall wealth.

As a fee-only firm, it only serves your interests and does not receive any commissions from third parties for its investment management services.

## **Key Factors That Enabled Newport Private Wealth, Inc. to Rank as One of the Best Toronto Wealth Management Firms**

### **Strong Value Proposition**

As one of the top investment firms in Toronto, Newport places a strong emphasis on providing clients with comprehensive, expert service. For new clients, there are plenty of convincing reasons to choose Newport, which include:

- Exclusive focus on individuals and families
- Holistic wealth management
- Independent ownership and thinking
- Alignment with clients
- Dynamic diversification
- Less risk and volatility
- Exceptional professional team
- Independent, specialist money managers
- Extraordinary service

### **Highly Talented Team**

For many clients, finding the best Toronto financial advisor means finding a staff of accredited, experienced professionals that can tackle a variety of financial challenges.

As one of the top investment firms in Toronto, Newport employs a large team with an impressive range of industry certifications, including:

- CFA—Chartered Financial Analyst
- CPA—Certified Public Accountant
- CA—Chartered Accountant
- FCA—Fellow Chartered Accountant
- CLU—Chartered Life Underwriter
- CFP®—Certified Financial Planner
- CIWM®—Certified International Wealth Manager
- CIM—Chartered Investment Manager

Many of these designations come with strict requirements for fiduciary duties and ongoing education, ensuring that clients receive advice that is both up-to-date and in their best interests.



### *Newport Private Wealth, Inc. - Toronto*

#### **Rating Summary**

As a top financial advisor in Toronto, Newport Private Wealth provides clients with an array of distinct advantages, like a commitment to independence, upholding fiduciary duties, and taking a holistic approach to wealth management.

With an inclusive fee structure that simultaneously covers investment management and financial, tax, estate, and succession planning, Newport Private Wealth is a great Toronto financial advisor to consider partnering with this year.

---

## **Olympian Financial, Inc. Review**

---

Founded in 1993, [Olympian Financial](#) is an independent financial advisor in Toronto that offers wealth management with a strategic and methodical investment style.

Olympian Financial does not specify whether they are a fee-only or fee-based firm. As always, we recommend verifying compensation structure before partnering with any Toronto financial advisor.

#### **Key Factors That Enabled Olympian Financial to Rank as a Top Independent Financial Advisor in Toronto**

## **Building Wealth**

Rather than receive pre-packaged advice, Olympian advisors offer individualized plans that differ based on your goals and needs. This includes two approaches to financial planning:

- Tactical wealth management
- Personalized wealth management

The tactical approach means that Olympian's investment strategies are more efficient and flexible than the traditional strategies employed by other firms. This gives their clients an advantage in the financial marketplace.

Personalized wealth management means that your portfolio will never be pre-packaged. Your individual needs will be met with a personalized plan put together by skilled and experienced advisors.

As a top independent financial advisor in Toronto, the Olympian team works with each client individually to determine the optimal approach for their current needs and situation as well as their future goals.

## **Ethics-Driven Investment Management**

Part of what makes Olympian Financial into such a competitive financial advisor in Toronto is their commitment to operating under a core set of ethics. These include:

- **Embodying Integrity**—Includes providing objective, impartial, and complete information to clients, staying up-to-date on industry trends, maintaining independence, and more
- **Fostering Relationships**—Includes maintaining a supportive, team-based environment, bringing value to clients, treating all individuals with dignity and respect, and more
- **Building Success**—Involves using every possible tool, innovation, and technology to deliver value and improve results

## **Rating Summary**

With a commitment to maintaining independence and supporting clients through a strong foundation of ethics, Olympian Financial is a great choice for both new and seasoned investors to consider partnering with.

However, our review found that Olympian Financial does have some room for improvement when it comes to how the firm communicates their value. For example, finding detailed information on specific services through Olympian Financial's website is challenging, as the firm provides a scarce amount of detail, especially when compared to competing investment firms in Toronto.



By elaborating on the firm's full range of financial capabilities, Olympian Financial could easily improve both their value proposition to new clients and their rating as a top financial advisor in Toronto.

*Popular Article: Top Wealth Managers and Advisors in Florida*

---

## **PWL Wealth Management, Inc. Review**

---

Founded in 1996, [PWL Wealth Management has](#) grown to four locations across Canada.

PWL never receives commissions or kickbacks from outside parties; the firm only receives fees from their clients. This policy gives you comfort in knowing that your needs will be second to none.

### **Key Factors That Enabled PWL Wealth Management to Rank as a Top Toronto Financial Planner**

#### **Integrated Approach to Wealth Management**

To be truly successful, wealth management should include both financial planning and investment management. PWL adopts this holistic approach by integrating both financial planning and wealth management services, including:

- **Setting Objectives**—Includes an in-depth consultation on current and future financial, individual, family, and business goals
- **Retirement and Estate Planning**—Seeks to maximize cash flow, optimize investments, and preserve assets
- **Institutional-Style Portfolio Management**—Customized discretionary portfolio management
- **Tax Planning and Preparation**—Tax-efficient portfolio construction, in-depth tax planning, reporting, and return preparation
- **Income and Asset Protection**—Seeks to integrate life, disability, and critical illness insurance with tax and estate issues

#### **Building Your Personalized Portfolio**

PWL has a step-by-step process for learning about you and understanding your investment needs and goals.

- **Discovery Meeting**—PWL will review the current state of your financials, identify your goals, and brainstorm with you about how to achieve your goals.

- **Proposal Meeting**—At your next meeting, a Toronto financial advisor will have evaluated your situation and will present a draft plan for moving forward.
- **Commitment Meeting**—If you decide that PWL’s proposal is the right plan for you, you will also sign appropriate documents to begin your relationship with PWL.
- **Progress Meetings**—PWL keeps you updated with the status of your accounts, while acting as an open forum to ask any lingering questions.
- **Review Meetings**—These meetings keep both you and your Toronto financial advisor up-to-date. You’ll have the opportunity to share any changes to your finances and be de-briefed on investment progress.



*PWL Wealth Management*

### **Rating Summary**

As a top financial advisor in Toronto, PWL Wealth Management provides clients with a strong, integrated approach to wealth management, allowing for multiple financial challenges to be addressed at once.

With a focus on personalization, an academic approach, and a fiduciary commitment, PWL is one of the best independent financial advisors in Toronto to consider partnering with this year.

---

## **Stewart & Kett Financial Advisors Review**

---

Founded in 1986, [Stewart & Kett](#) is a Toronto financial advisory firm that provides “advice-only financial planning.” General services available from his financial advisor in Toronto include financial planning, tax services and investment consulting.

## **Key Factors That Enabled Stewart & Kett to Rank as a Top Toronto Financial Planner**

### **Advice-Only**

As an advice-only firm, the Toronto financial planners at Stewart & Kett work on either a retainer or an hourly basis.

They are completely objective, and advice is never tied to a certain financial product, compensation or referrals. There is no conflict of interest when outlining the best financial solutions for individual clients.

Also critical to the approach of this Toronto wealth manager is their ability to ensure clients feel comfortable disclosing everything about their situation, so they can get the best and most relevant possible advice.

### **Wide Range of Financial Capabilities**

For many clients, part of finding the best Toronto financial advisor is finding a firm that can accommodate a diverse range of financial needs.

Goals and situations are subject to fluctuate over time, and the Toronto financial planners at Stewart & Kett are prepared to handle a variety of challenges, including:

- **Financial Check-Up**—Complete overview of your financial health, including goals, income, expenses, assets, debts, insurance, and estate needs
- **Financial Planning**—Includes Family Office, Cash Management, Retirement, Risk Management, Estate Planning, and Charitable Giving
- **Investment Consulting**—Portfolio Assessment, ETF Portfolios, and portfolio manager research and selection
- **Tax Services**—Personal and Corporate Tax Services

### **Rating Summary**

Compared to competing Toronto financial advisors, Stewart & Kett provides clients with an impressive range of detailed financial capabilities, making it easy for potential clients to fully evaluate the firm before even meeting with an advisor.

With a transparent pricing structure, a highly accredited team, and over two decades of experience, Stewart & Kett is one of the best financial advisors in Toronto to consider partnering with this year.

***Read More: Best Financial Advisors in San Diego, California***

---

## Tacita Capital Review

---

[Tacita Capital](#) is an independent firm specializing in “ultra-affluent” family investors, providing specialized skills to help families navigate through complicated investment, savings, and tax issues.

While we could not confirm whether Tacita uses a fee-only or fee-based structure, the firm [states](#) that they “are compensated solely by our clients on a transparent fee basis; we receive no third-party compensation.”

As always, we recommend verifying fees before partnering with any Toronto financial planner.

### **Key Factors That Enabled Tacita Capital to Rank as One of the Best Toronto Wealth Management Firms**

#### **Talented Team**

As one of the top wealth management firms in Toronto, Tacita Capital maintains a strong team of highly certified financial advisors, planners, and investment management professionals.

Clients can benefit from a wide range of certifications and designations, which include:

- RFP—Registered Financial Planner
- CFP®—Certified Financial Planner
- CFA—Chartered Financial Analyst
- CPA—Certified Public Accountant
- CA—Chartered Accountant
- CIM®—Chartered Investment Manager
- CGA—Certified General Accountant

Many of these certifications come with strict requirements for fiduciary duties and on-going education, meaning that clients receive advice that is both up-to-date and truly catered to their needs.

#### **Core and Satellite Investment Structure**

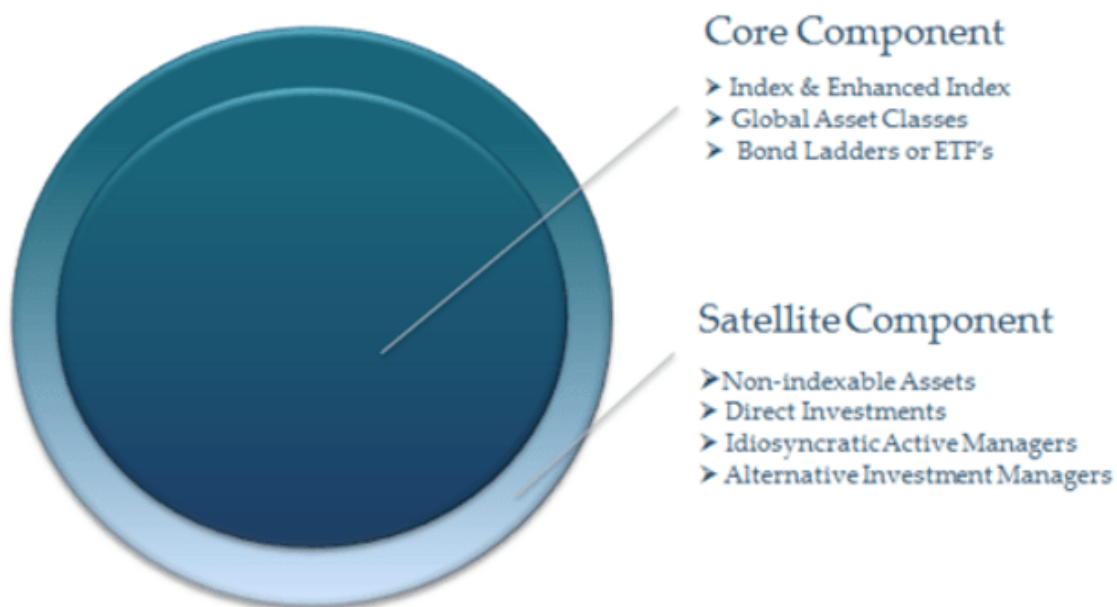
Tacita believes that traditional investment models are insufficient because they induce unnecessary advisor fees, lack a tax-return focus, and assume a high level of risk due to a lack of diversification.

As such, this top Toronto financial advisory firm employs a “[Core and Satellite](#)” investment structure used by premier investors and affluent families.

The Core prioritizes long-term returns and comprises enhanced index and exchange-traded funds (ETFs) focusing on liquid portions of equity markets. Also included are value and high-quality stocks which have proven to result in higher returns for investors.

Satellite aspects supply a second layer of investments to your portfolio that enhances your overall return through:

- Diversification
- Higher overall return
- Access to tax deferrals



*Tacita Capital*

## **Rating Summary**

Affluent families often have complex financial challenges, which makes a Toronto wealth management firm like Tacita Capital an incredibly valuable resource.

With a boutique focus on providing comprehensive financial planning and investment management for affluent families, Tacita Capital is one of the best financial advisors in Toronto to consider partnering with this year.

---

# TriDelta Financial Review

---

[TriDelta Financial](#) is a Toronto- and Oakville-based advisory firm with a solid team of advisors, partners, and specialized consultants offering a range of comprehensive services.

We could not confirm whether TriDelta uses a fee-only or fee-based structure, although the firm does [state](#) that, “as an independent company, we do not benefit from selling one particular product over another.”

As always, we recommend verifying compensation structure before partnering with any financial advisor in Toronto.

## **Key Factors That Enabled TriDelta Financial to Rank as a Top Toronto Financial Advisor**

### **Comprehensive Approach**

As one of the best financial advisors in Toronto, TriDelta offers a full range of investment planning, wealth management, and insurance-based services.

At TriDelta, you can manage most of your financial needs. Aside from wealth planning and investment management, these Toronto financial planners also offer insurance services and a range of financial consultants.

For example, the firm works with contracted mortgage brokers in the event that a TriDelta client has a mortgage-related question. Offering access to these consultants means that all of your financial needs can be handled at one office, making life more organized and less complex.

### **Strong Value Proposition**

For new clients that are wondering whether TriDelta is a good fit, the firm provides six key components—or value propositions—about working with TriDelta. These include:

- All advisors share professionalism, integrity, and client focus
- We work for you and get paid accordingly
- Wealth advisors are like the ‘Family Doctor’ by creating customized plans
- Wealth advisors provide a coordinated plan and team-based advice
- Total fees for working with TriDelta are often half the cost than at competing Toronto financial advisors
- We offer access to the best product solutions regardless of company

## Rating Summary

For clients looking for a one-stop shop for their financial services, TriDelta is a great fit.

With a wide range of financial capabilities, a talented advisory team, and the ability to connect clients to a range of other financial professionals, TriDelta Financial is one of the best financial advisors in Toronto to consider partnering with this year.

***Related: Top Financial Advisors in Lexington & Louisville, Kentucky | Ranking | Kentucky Wealth Management Firms***

---

## Conclusion – Top 11 Best Financial Advisors in Toronto, Canada

Depending on their unique financial needs, everyone has varying factors to consider when choosing a financial advisor; however, everyone needs an advisor that can be trusted to perform sincere and fair service.

With an overwhelming number of options, we hope that our list of the top financial advisors in Toronto has helped you identify at least one firm that will work best for you and for your family.

Most Toronto financial advisors welcome potential clients for a prospective interview, so call them and do further research before deciding to partner with one.

No matter what firm you choose, you should feel completely confident that your financial planning and investments are in the right hands.

---

## 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/canada-toronto-city-panorama-sky-3290310/>
- [https://www.caringforclients.com/index.cfm?pagepath=About/Our\\_Process&id=11419](https://www.caringforclients.com/index.cfm?pagepath=About/Our_Process&id=11419)
- <https://pixabay.com/en/toronto-canada-city-urban-skyline-1812178/>
- <http://www.newportprivatewealth.ca/what-we-do/investment-management/>
- <https://www.pwlcapital.com/en/Advisor/Toronto/Toronto-Team/Team>
- <https://www.tacitacapital.com/portfolio-management/portfolio-structure/>