
Top 10 Best Financial Advisors in Austin, TX | 2018 Ranking

RANKING & REVIEWS BEST FINANCIAL ADVISORS IN AUSTIN

2018 Ranking: Identifying the Top Financial Advisors in Austin, Texas

If you have been thinking about using the services of a financial advisor in Austin, Texas, then you are in good company. The need for financial advisors in Austin has risen steadily over the last couple of decades and is expected to grow more in coming years.

To meet this increasing demand, financial advisors are popping up everywhere. There are thousands of financial advisors and hundreds of wealth managers in Austin, Texas.

So, how do you choose the best financial advisor in Austin, Texas who can work with you to help you achieve your financial goals?

Taking on the arduous task of finding a top financial advisor in Austin, Texas, would quickly send you pouring through more information than you could ever process. If you're not already a seasoned professional yourself, you may be stumped about what even makes an average financial advisor in Austin an excellent one.



Award Emblem: Best 10 Financial Advisors in Austin, TX

In our ranking and review, we'll help you find the best Austin financial advisor for your needs by answering common consumer questions like:

- Which Austin financial advisor specializes in what?
- What are the average financial advisor fees in Austin, Texas?
- Which financial advisors in Austin offers comprehensive services and which ones cover only the basics?
- What are the basic services provided by wealth management in Austin, TX?

Top 10 Best Financial Advisors in Austin | Brief Comparison & Ranking

Austin Financial Advisors	Highlighted Features	Ratings
Austin Asset	Large-scale services with a boutique focus	5
Barnett Financial	Customized services for each client	5
Bell Wealth Management	Personalized service & broad financial expertise	5

Briaud Financial Advisors	Fee-only structure & fiduciary commitment for over 30 years	5
FMP Wealth Advisers	Free initial consultation for financial planning	5
ML&R Wealth Management, LLC	Specialized financial services for women	5
Pauley Financial	Financial services for independent women	5
Richard P. Slaughter Associates	Personalized approach to wealth management	5
Stone Asset Management, Inc.	GuideTrack Service	5
WorthPointe	Client-centric services & philosophies	5

Table: Top 10 Best Financial Advisors in Austin | Above list is sorted alphabetically

How to Choose Financial Advisors in Austin

Because everyone has their own unique financial situation and goals, there is no one-size-fits-all answer for the best financial advisor in Austin.

Services provided by wealth managers in Austin, Texas, can range from basic wealth management to stocks, bonds, and investments to life-event planning and retirement.

You'll find Austin financial advisors with a variety of fees, criteria, and even some with minimum requirements for investable assets. You'll even find some financial planners in Austin who cater to a specific demographic, like women, business executives, retirees, or those who serve in the military.

In this never-ending sea of financial opportunity, you can rest easy if you are looking for financial advisors in Austin.

Luckily, we've done most of the hard work for you, using a rigorous selection methodology, to narrow down a comprehensive list of thousands of financial advisors in Austin, resulting in 2018 Ranking of Top 10 Best Financial Advisors and Wealth Managers in Austin, Texas, presented in this article.

Read on to understand what we based our selections on, and what makes each Austin financial advisory firm one of our top picks.



Best Financial Advisors in Austin, TX

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 Austin and Wealth Management Firms in Austin, TX

Below, please find the detailed review of each of the best financial advisors in Austin included in our ranking of the top Austin financial advisors. We have highlighted some of the factors that allowed these Austin financial advisors to score so well in our selection ranking.

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

- [Austin Asset](#)
- [Barnett Financial](#)
- [Bell Wealth Management](#)
- [Briaud Financial Advisors](#)
- [FMP Wealth Advisers](#)
- [ML&R Wealth Management](#)
- [Pauley Financial](#)
- [Richard P. Slaughter Associates](#)
- [Stone Asset Management, Inc.](#)
- [WorthPointe](#)

Click below for previous years' rankings:

- **2016 Review:** [Best 10 Financial Advisors in Austin](#)
- **2017 Review:** [Top 9 Best Financial Advisors in Austin](#)

Austin Asset Review

As a fee-only financial advisory firm founded over 25 years ago, [Austin Asset](#) has been blazing trails for a long time.

Austin Asset offers a variety of tools and provides wealth management and wealth planning services to high net worth families and non-profit organization in the greater Austin area.

Key Factors that Enabled Austin Asset to Rank as a Top Financial Advisor in Austin

A Solid System

Few firms have created a targeted approach like Austin Asset. They've taken the services they offer and created various systems and tools to give you the most comprehensive approach available.

Two examples are their Building Organized Wealth (BOW) and Actual Rate of Return on Wealth (ARROW) models. Each is designed to meet specific client needs while looking ahead to building a strong financial future.

You can [take a comprehensive look at both models](#) to see which one may be right for you.

Large-Scale Boutique Style

While Austin Asset is in fact a boutique firm, catering exclusively to families and non-profits to provide the best and most personalized service, they are certainly not lacking in any department.

Not only does their staff consist of Certified Financial Planners, accountants, advisors, and executives, their Business Advisory Board is comprised of four additional professionals who are the best of the best, an invaluable asset to their team and your financial future.

Furthermore, Austin Asset has an Investment Policy Committee that meets periodically to discuss current market trends, news, and investment philosophies. This truly shows the strong core they have built in their company.

Rating Summary

With a strong focus on creating and sustaining long-term relationships, Austin Asset provides a solid foundation, setting clients up for success over the long haul.

As one of the first Austin financial advisors to adopt a fee-only model, Austin Asset is also a pioneer in the financial industry, solidifying the firm's 5-star rating.

See Also: Best Financial Advisors in Miami and Coral Gables, Florida

Barnett Financial Review

[Barnett Financial](#) is a fee-only personal wealth management firm in Austin, TX that provides long-term family financial planning and investment management to a select number of clients.

Their goal is to cover a broad range of financial planning and investment services tailored specifically to their clients' needs. In fact, they are so intent on putting you first, you'll find their dedication in all that these Austin financial advisors do.

Key Factors that Enabled Barnett Financial to Rank as a Top Financial Advisor in Austin

A Deep Understanding

Barnett Financial believes that getting to know you is the key to expert financial services—and that each client's financial goals will be equally as unique as they are.

For these reasons, before the topic of conversation turns to finances and asset allocation, Barnett Financial takes the time to understand your life philosophy, your dreams, and your goals.

Only when they have a real understanding of who they are serving can these Austin financial advisors provide the best possible financial advice.

Tailored Services

Barnett Financial does not have a patented system that is used for everyone. Instead, they choose to tailor services to each client, adding in details that are crucial for one client but removing them when they don't pertain to another.

These services include:

- Goals and Objectives
- Cash Flow/Budgeting
- Retirement Planning
- Investment Analysis and Recommendations
- Employee Benefits
- Life and Disability Insurance Needs Analysis
- Income Tax
- Estate Planning
- Risk Management
- Education Funding
- Business Planning



Barnett Financial - Austin Wealth Management Firm

Rating Summary

As a Registered Investment Advisor, clients of Barnett Financial have the additional benefit of legally-mandated, unbiased financial advice. Clients can also benefit from a personalized approach, which can be difficult to find among financial advisors in Austin.

When combined with a fee-only pricing structure, this provides a competitive advantage, instilling trust, creating high standards of service, and earning Barnett Financial a 5-star rating for exceptional wealth management in Austin.

Don't Miss: Top Financial Advisors in Orlando, Florida

Bell Wealth Management Review

[Bell Wealth Management](#) is a family-owned and operated Austin wealth management firm that takes a disciplined approach to helping their clients manage their wealth and investment plans.

As a boutique firm serving physicians and business owners, clients will find that Bell Wealth Management provides a higher level of personalized service that can be hard to find among Austin wealth management firms.

Key Factors that Enabled Bell Wealth Management to Rank as a Top Financial Advisor in Austin

Comprehensive Services

As one of the top financial advisors in Austin, Bell Wealth provides deep and broad financial expertise to serve a variety of client needs. Services beneath Investment Consulting include:

- Asset Allocation
- Portfolio Management
- Executive Compensation
- Alternative Investments

Their Austin financial planners can also tackle Advanced Planning challenges, which include:

- Wealth Enhancement
- Wealth Protection
- Wealth Transfer

- Charitable Giving

No-Cost Second Look

If you aren't sure that your current portfolio is working hard for you, let the team at Bell Wealth give you a no-cost second opinion.

Keeping in stride with their desire to look out for the best interest of their clients, they will evaluate your current plan free of charge, making sure you are at the top of your financial game.

Not many financial advisors in Austin are willing to do that, making Bell Wealth Management one of the best Austin wealth management firms for those that want to explore their options.



Bell Wealth Management Austin, TX

Rating Summary

In addition to the personalized service and expertise offered in-house at Bell Wealth Management, they have long-standing ties with several partnering firms such as Charles Schwab, Vanguard, and the CFA Institute.

These carefully crafted relationships only strengthen the knowledge and expertise provided by this team of Austin financial advisors, making Bell Wealth Management stand out among the best Austin wealth management firms.

Related: Best Financial Advisors in Omaha, Nebraska

Briaud Financial Advisors Review

With two locations in Austin and College Station, [Briaud Financial Advisors](#) provides comprehensive services including investment and advisory options for not only local high net worth families and individuals, but also to clients across the U.S.

Founded by [Janet Briaud](#) in 1986, the firm has maintained their fee-only structure and fiduciary commitment for over 30 years, making them one of the best financial advisors in Austin to consider partnering with.

General services available from this leading financial advisor in Austin include family office, financial planning, investment management and trust services.



Briaud Financial Advisors

Key Factors that Enabled Briaud Financial Advisors to Rank as a Top Financial Advisor in Austin

Objective Advice

For many clients looking for an Austin financial advisor, one of the most important considerations is a sense of objectivity in the services provided by that advisor.

This is an area where Briaud excels as one of the best financial advisors in Austin, TX. Briaud works with clients to deliver personalized, unbiased advice because they adhere to fiduciary standards.

This means they put clients' best interests ahead of everything else, and Briaud has been fee-only since 1986. This means they have never accepted any commissions, and this is a big reason they're considered a top Austin wealth manager firm.

Exclusivity

Along with the provision of unbiased, objective advice, this top wealth management firm in Austin also specializes in service that is personalized and exclusive.

Briaud works with a limited number of select clients, allowing each Certified Financial Planner that works for this Austin financial advisor to fulfill the needs of a very small group of individuals or clients, focusing on even the smallest details to maximize current wealth.

Briaud doesn't take an approach that requires them to be a high-volume business, which is something many clients appreciate about this wealth management firm in Austin.

Rating Summary

While many potential clients may worry about Austin financial advisors taking an impersonal, cold approach to their finances, Briaud strives to break out of this mold by delivering services with a warm, friendly touch.

Their approach is built on the concept of building long-term relationships gradually, and having conversations rather than sending over formal written content for clients to review.

Along with their fee-only and fiduciary commitments, it's this quest for a warm and personal experience that has led Briaud to earn a 5-star rating and solidify their ranking as one of the top firms of Austin financial advisors.

Popular Article: Top Financial Advisors in Dallas, Texas (Ranking of Dallas Wealth Advisors)

FMP Wealth Advisers Review

Founded in 1987, [FMP Wealth Advisers](#) was one of the first fee-only personal wealth management firms, a commitment which remains today.

As a top fee only financial planner in Austin, FMP employs a tight-knit group of Austin financial advisors, specialists, and service professionals to ensure that clients receive the highest level of service.

With corporate headquarters in Austin, FMP also serves clients in Beaumont, TX and Lake Charles, LA.

Key Factors that Enabled FMP Wealth Advisers to Rank as a Top Financial Advisor in Austin

Independent Fiduciary

As a new client, one of the most important factors in finding the best financial advisors in Austin is determining whether that advisor can be trusted to put your best interests first.

FMP knows the importance of establishing trust within the client relationship, which is why the firm is:

Independent & Fee-Only

As an independent, fee only financial planner in Austin, FMP does not accept commissions from third parties, like stock brokerages or insurance companies.

As a result, clients can trust that their Austin financial advisor truly has their best interests in mind, working solely for them and not for personal gain.

Fiduciary Commitment

Rather than adhere to a basic “suitability standard,” FMP adopts a fiduciary responsibility, meaning that the firm—and their Austin financial planners—is legally responsible to always act in their clients’ best interests.

Firms that accept a fiduciary commitment will automatically have client-facing services and management philosophies, providing great options for wealth management in Austin.

Financial Solutions

As a top financial advisor in Austin, TX, FMP provides clients with a variety of comprehensive, detailed financial solutions. These include:

- Financial Planning—Involves defining goals, creating a unique plan, and regularly assessing progress to ensure that goals are met
- Investment Management—Uses objective, disciplined strategies and a team-based approach to tailor investments to individual preferences, needs, and goals
- Qualified Plans—Helps guide employers through the process of implementing and monitoring employee retirement plans
- Private Investments—Provides diversification for sophisticated portfolios, effectively fine-tuning a client's overall strategy

Rating Summary

While FMP may have a smaller team of financial advisors in Austin than competing wealth management firms, their service offerings and client-centric philosophies are anything but small.

Not only can clients benefit from a diverse range of services, a focus on long-term relationships, a fee-only business model, and a fiduciary commitment, but they also offer a free initial consultation for financial planning strategies, making FMP one of the best Austin financial planners for first-timers to consider.

Read More: Top Financial Advisors in Kansas City, Leawood, and North Kansas City

ML&R Wealth Management LLC Review

A top fee-only team of registered investment advisors in Austin, [ML&R Wealth Management LLC](#) strives to bring transparency to financial planning and management on behalf of their clients.

ML&R approaches their work with the idea that clients have unique needs, and they need tailored services that are based on those specific needs.

ML&R includes a large team of Austin financial advisors, wealth management partners, and financial planning associates.

Key Factors that Enabled ML&R Wealth Management LLC Review to Rank as a Top Financial Advisor in Austin

The Fiduciary Standard

As one of the top financial advisors in Austin, ML&R adheres to the fiduciary standard, meaning that all guidance and advice is based on the highest of ethical standards, and is made solely in the best interest of the client.

Because they are a fee-only firm, ML&R does not receive revenue from third parties that could lead to a conflict of interest with clients, including commissions.

Also, ML&R, one of the leading Austin wealth managers, strives to advise their clients in the ways they would advise themselves, instilling trust within the client-advisor relationship.

Holistic Approach

ML&R, one of the best financial advisors in Austin, bases their investment and advisement philosophy on an approach that values evidence over emotion.

Their investment philosophy considers academic research instead of having opinions based on financial news cycles. Ultimately, the goal is for clients to receive the best possible returns from the market, based on diversification, low costs and appropriate levels of risk.

Additionally, this financial advisor in Austin utilizes a holistic approach that incorporates not just investment advice, but also takes into consideration all elements of a client's entire financial life, creating a dynamic and holistic approach.

Specialized Financial Services for Women

ML&R, one of the top Austin wealth management firms, serves a unique group of clients, and one such group is women.

Because women often have unique financial concerns—and tend to feel misunderstood by Austin financial advisors—ML&R has made a strong commitment to helping women with:

- Setting goals and objectives, including family and charitable giving
- Budgeting, cash flow planning, and retirement projections
- Managing executive compensation and benefits
- Coordinating with taxes and investments
- Transitioning wealth between generations

As a further demonstration of ML&R's dedication to understanding women and their finances, firm partner [Stuart Vick Smith](#) is a recognized industry expert in Women and

Wealth, recently authoring a book called *Finding Your Financial Path: A Guide for Women Through Life's Twists and Turns*.



Top Financial Advisor in Austin, TX

Rating Summary

With a personalized approach and fee-only advisement, ML&R is a top financial advisor in Austin, TX for clients that value transparency and long-term relationships.

ML&R also maintains an expert focus on providing financial services tailored to women, making them stand out among other Austin financial advisors and earning the firm a 5-star rating overall.

Related: Top Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee

Pauley Financial Review

[Pauley Financial](#) is a fee-only financial planning and investment management firm with three locations in Austin, Dallas/Fort Worth, and San Antonio.

As a fee-only and fiduciary financial advisor in Austin, clients of Pauley Financial can trust that their financial advice is free from conflicts of interest from commissions, bonuses, or referral fees.

This top financial advisor in Austin provides services for Medical Professionals, Business Owners, Independent Women, Young Professionals, Mid-Career Professionals, Retirees, and those nearing Retirement.

Key Factors that Enabled Pauley Financial to Rank as a Top Financial Advisor in Austin

Engaging Leadership Team

The [leadership team](#) at Pauley Financial consists of three principals and two directors. They bring a range of educational backgrounds, career experience, and personalities, creating a truly dynamic leadership team.

The professional background of each advisor is described in detail, highlighting their unique motivations and individual passions in the field of financial advisement.

The result is a personable, approachable, and fully motivated team. It also provides a unique opportunity for clients and prospective clients to get to know their financial advisor before even stepping through the front door.

Financial Services for Independent Women

Pauley Financial believes that independent women have distinct financial realities.

With longer life spans and a greater likelihood of taking a break from the workforce to care for family responsibilities, independent women have unique financial needs.

Pauley Financial is fully prepared to address any financial questions that women may have, regardless of their marital status. The firm wants their clients to be empowered through financial independence and can custom-tailor their services to a woman's needs.

For women who are unsure as to how they fit in with these services, Pauley Financial provides [case studies](#) of past clients. These case studies discuss financial complications of divorce, second marriages, saving for retirement, the loss of a spouse, and more.

Rating Summary

As one of the top Austin financial advisors, Pauley Financial doesn't want to simply take your money and make decisions with it.

Instead, they want you to learn about the process, understand your options, make informed decisions, and create a partnership that is equal parts engaging and fulfilling.

This approach not only instills trust between clients and their advisors, but it also lays a foundation for long-term relationships, earning Pauley Financial a 5-star rating and solidifying their ranking as a top financial advisor in Austin, TX.

Don't Miss: Best Independent Financial Advisers in the UK (Top IFAs)

Richard P. Slaughter Associates Review

Founded in 1991, [Richard P. Slaughter Associates](#) is an independent, fee-only financial planning and wealth management firm in Austin and Dallas.

Richard P. Slaughter Associates holds the distinction of being one of the nation's first fee-only wealth management firms, providing in-depth solutions for individuals and families.

As a fee-only firm, Richard P. Slaughter Associates maintains a focus on the best interests of the client, without the potential for conflicts of interest that can come from commission-based advisors and firms.

Key Factors that Enabled Richard P. Slaughter Associates to Rank as a Top Financial Advisor in Austin

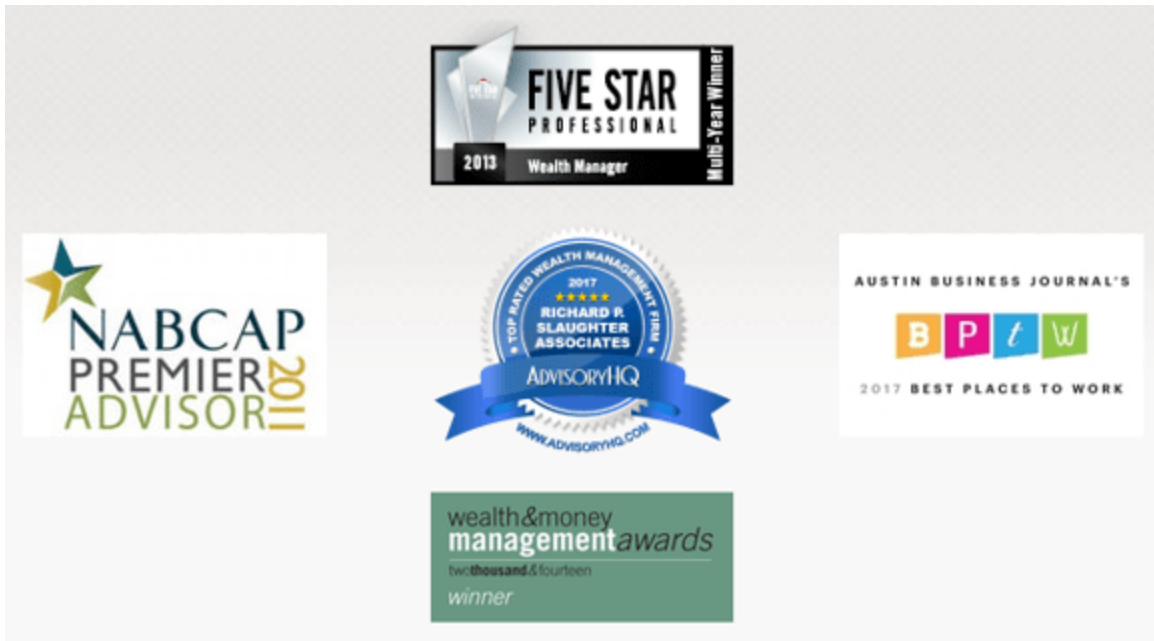
Awards and Recognition

Much like many of the other names on this ranking of the best financial advisors in Austin and the leading registered investment advisors in Austin, the firm has won many awards and consistently been recognized over the years.

For example, this top Austin wealth manager firm has been named by *Texas Monthly* as a Five Star Wealth Manager for six consecutive years, with individual honors for each member of the executive team.

Richard P. Slaughter Associates is also an NABCAP Premier Advisor, which recognizes those firms that uphold the utmost in business standards, financial management capabilities, and are dedicated to transparency in financial services.

Additionally, the firm has been recognized as one of the Best Places to Work for thirteen consecutive years by the *Austin Business Journal*, adding to the numerous awards received by this Austin financial advisory firm.



Richard P. Slaughter Associates Recognition

RPS Retirement Plan Advisors

One of the unique areas of service offered by this pick for one of the best financial advisors in Austin is called [RPS Retirement Plan Advisors](#).

This Austin financial advisor firm launched RPS to provide 401(k) services and smart investment choices that are on-par with services typically reserved for high net worth clients.

There are a limited number of advisors with the ability to assume fiduciary responsibilities in terms of 401(k) management and advisement, and to do so, firms must provide services without commissions.

Rating Summary

One of the most unique aspects of Slaughter Associates—and a leading factor in the firm's success—is their approach to wealth source.

This leading financial advisor in Austin knows that not all wealthy individuals and families are the same, creating a personalized approach to wealth management.

With individualized services, a wide range of accolades, and a fee-only structure, Richard P. Slaughter Associates is one of the best firms for expert wealth management in Austin, TX.

Popular Article: Best Financial Advisors in Vancouver, BC, Canada

Stone Asset Management, Inc. Review

Founded in 2004, [Stone Asset Management, Inc.](#) is an independent, fee only financial planner in Austin offering investment management and financial planning services.

With an insular, dedicated team, Stone Asset Management holds transparency and unbiased advice as core financial management values, making the firm one of the top financial advisors in Austin, TX.

Key Factors that Enabled Stone Asset Management to Rank as a Top Financial Advisor in Austin

Willing to Work with Smaller Investors

Many firms offering wealth management in Austin, TX have high income or investment requirements, which can be problematic for smaller or beginner investors.

As noted on their [website](#), “You don’t necessarily need to consider yourself ‘wealthy’ to benefit from working with Stone Asset Management,” as the firm caters to a wide range of clients.

For clients within this category, hourly financial planning is a great way to benefit from financial expertise and advisement without needing to meet income or investment requirements.

With Stone Asset Management, a simplified and secure financial life is much more accessible, representing a truly client-centric approach to financial planning.

GuideTrack Service

GuideTrack is a unique offering by Stone Asset Management that fills in the gaps for clients that do not require complete investment management, but still want a continued relationship with the firm.

Available as a subscription in varying levels to meet different client needs, GuideTrack provides clients with:

- Online access to personal financial plans
- Ability to link accounts and measure progress
- Access to educational material and webinars
- Annual virtual meetings
- Email access to firm personnel

Potential clients can learn more about GuideTrack by visiting the firm's [ADV](#).



Stone Asset Management Austin

Rating Summary

While Stone Asset Management, Inc. may be the smallest firm on our list of the best Austin financial advisors, they provide deep value to their clients through a fee-only structure, fiduciary commitment, and flexible financial services.

Their willingness to work with smaller investors demonstrates a deep commitment to individual financial health, rather than assets under management. The firm also provides unique value through their GuideTrack service, allowing investors to customize their experience.

With a focus on transparency and services for low and high-net-worth clients, Stone Asset Management is a competitive choice among financial advisors in Austin, TX.

WorthPointe Review

As a fee-only, fiduciary financial advisor in Austin, [WorthPointe](#) bases their business and services on the concept of relationships. Their goal is to create long-term relationships and plans that are beneficial to their clients in every way.

As a leading Austin wealth management firm, all WorthPointe advisors are also owners, meaning that they are wholly accountable and part of a long-term team of Austin financial advisors.

WorthPointe has a total of six offices, serving clients from San Diego, La Jolla, Bedford, Austin, Newport Beach, and Jackson, Wyoming.

Key Factors that Enabled WorthPointe to Rank as a Top Financial Advisor in Austin

Multi-Faceted Philosophy

One of the key ways many financial advisors in Austin and Austin wealth managers differentiate themselves from one another is through their core investment management and financial planning philosophy.

The investment philosophy at WorthPointe, one of the leading financial advisors in Austin, includes the following concepts:

- Success is built on trust and confidence from clients, making transparency an essential piece of their Austin wealth management services.
- The investment approach undertaken by WorthPointe, one of the best financial advisors in Austin, is also based on diversification, low costs, and tax efficiencies.
- Finally, WorthPointe always works to help each client achieve unique financial goals alongside personal goals, which is what sets them apart as a top financial advisor in Austin.

Comprehensive Advice

As has been mentioned throughout this ranking of the top Austin financial advisors and Austin wealth managers, extremely important in the ranking process was a broad range of services.

This is important to clients when selecting registered investment advisors in Austin because people and families typically have complex financial needs and goals.

That means a successful Austin wealth manager needs to be able to adequately address the complexity of these needs and goals, and that is accomplished by having a wide variety of service offerings and extensive experience.

As one of the top Austin wealth management firms, WorthPointe has a team of CFP® Professionals, allowing advisors to provide guidance in:

- Estate planning
- Tax planning

- Investments
- Asset protection
- Charitable giving
- Legacy planning

Rating Summary

A common theme throughout our ranking of the top financial advisors in Austin is the importance of independent Austin financial advisors that act as fiduciaries.

As a fee-only fiduciary, this is an area in which WorthPointe excels, facilitating trust between clients and their advisors.

Our review also found that the WorthPointe team is truly invested in providing comprehensive, client-centric services and investing philosophies, solidifying the firm's 5-star rating and ranking among the best Austin financial advisors.

Conclusion: Top 10 Best Financial Advisors in Austin

With a plethora of information on the best financial advisors in Austin, Texas, what do you do next?

There are many good choices but knowing how to pick the right Austin financial planner is key. There are a few things you can do to further guide you in the right direction for finding a top registered investment management firm or wealth manager in Austin.

First, you should create a list of your assets. This would include money you have coming in from your job, pensions, or other sources, like real estate, stocks, and investments.

Compare this list with the top financial advisors in Austin and narrow down where you best fit. Most of our listed Austin-based RIAs, financial advisors and wealth managers do not have a minimum dollar amount for your assets, but there are a couple that do.

Others don't state a minimum but do want you to know they cater to "high net worth clients."

Next, create a list of your financial goals. Where do you see yourself today? In five years? In 20? Is retirement your main concern, or is investing your money to grow your assets one of your main goals? Have you recently gained an inheritance or been through a divorce? Use these key points in matching yourself up with the best possible advisor.

Lastly, when you choose a few Austin financial advisory firms that interest you, make contact. Most are happy to answer any questions you have. Some are even willing to sit down with you and give you a no-cost review to show you what they can do for you.

Your financial future is bright, and with the help of the right financial advisor in Austin, TX, you can put your trust in someone who truly keeps your best interests in mind.

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/skyline-cityscape-skyscrapers-park-2294676/>
- <https://www.barnettfinancial.com/>
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