
Top 10 Best Financial Advisors in Boston, MA | 2018 Ranking

RANKING & REVIEWS BEST FINANCIAL ADVISORS IN BOSTON, MASSACHUSETTS

2018 Ranking: The Top Financial Advisors in Boston, Massachusetts

Finding the right Boston wealth management firm, financial advisor, or financial planner is no easy task.

A metropolitan area like Boston, with its rich history in commerce, makes it a prime destination for financial advisors and investment management firms.

It doesn't matter what your specific financial goals are - a round-the-world trip, retirement savings, or funding a child's education - it helps to have a plan.

Working with a financial advisor in Boston can guarantee that your money is working while you do, and that you can create a plan to live comfortably in retirement. A professional can also help you avoid being hit by astronomical taxes while you grow your wealth.



Award Emblem: Top 10 Best Financial Advisors in Boston, MA

Top 10 Best Financial Advisors in Boston, MA | Brief Comparison & Ranking

Top Wealth Management Firms in Boston	Highlighted Features	Ratings
Birch Hill Investment Advisors	Multi-generational clients	5
Boston Financial Management	Large, talented team	5
Compass Planning Associates	Financial advice for businesses	5
Darrow Wealth Management	Free consultation available for new clients	5
Lexington Wealth Management	Financial services designed to empower women	5
McAdam Financial	Hybrid RIA	5
Modera Wealth Management	Responsive financial planning process	5

North American Management	Comprehensive resources	5
Boston Private Wealth	Comprehensive wealth management	3
Congress Wealth Management	Core and Satellite approach	3

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

Fee-Based vs Fee-Only Financial Advisors in Boston: What's the Difference?

When it comes to evaluating financial advisors in Boston, there are typically two types of firms to consider: fee-only and fee-based advisors.

How do you know which type of Boston financial advisor is right for you? Below, we'll provide you with a brief overview of everything you need to know about the differences between fee-only and fee-based Boston financial planners.

Fee-Only

When an investment firm or a financial advisor in Boston says that they are "fee-only," this means that they *do not* accept commissions or third-party referral payments.

Because an advisor's only source of income comes from the client, a fee-only pricing structure minimizes the inherent conflicts of interest that come along with recommending and selling investment products.

In short, a fee-only financial advisor in Boston is in a better position to act solely in the interest of their clients.

Fee-Based

Fee-based firms will receive *some* direct compensation from clients but are free to accept commissions from the companies who provide their financial products.

While a fee-based structure does create some potential conflict, many fee-based investment firms are also fiduciaries, which often counteracts the potential for conflict.

Boston financial planners that adopt a fiduciary commitment are legally responsible to fully disclose any conflicts of interest and are required to put the interests of their clients ahead of their own.



Top Boston Financial Advisors

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services, and products that are ranked on its various top rated lists?

Please click here “[AdvisoryHQ's Ranking Methodologies](#)” for a detailed review of AdvisoryHQ's selection methodologies for ranking top rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Best Wealth Management Firms in Boston, Massachusetts

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

- [Birch Hill Investment Advisors](#)
- [Boston Financial Management](#)
- [Boston Private Wealth](#)
- [Compass Planning Associates](#)
- [Congress Wealth Management](#)
- [Darrow Wealth Management](#)
- [Lexington Wealth Management](#)
- [McAdam Financial](#)
- [Modera Wealth Management](#)
- [North American Management](#)

Click below for previous years' rankings:

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

Birch Hill Investment Advisors Review

[Birch Hill Investment Advisors](#) is a Boston wealth management firm founded in 2007.

As a [fee-only](#) Registered Investment Advisor (RIA), Birch Hill acts as a fiduciary to its clients, providing individuals, families, and institutional clients with independent, unbiased advice.

Key Factors That Enabled Birch Hill to Rank as a Top Wealth Management Firm in Boston

Generations of Trust

The Principals who founded Birch Hill have over 100 years of combined experience in financial planning and wealth management. This gives Birch Hill one of the most experienced team of financial advisors in Boston, Massachusetts.

Perhaps more impressive, however, is the fact that some of Birch Hill's clients have been entrusting their family wealth to the firm over successive generations.

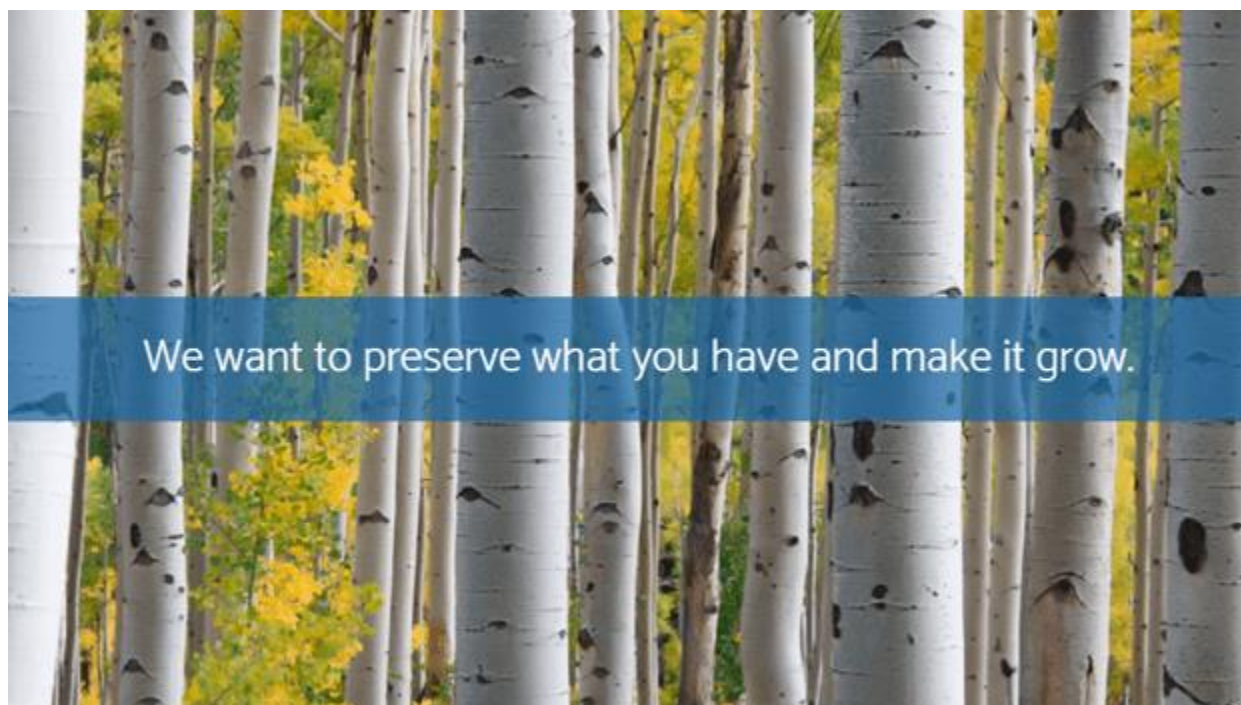
This speaks to the trust and stability that this Boston financial advisory firm has built with their client base through their decades of expertise in financial planning.

Focused on Your Long-Term Needs

As a top financial advisor in Boston, Birch Hill is dedicated to each individual client's bottom line.

These financial advisors in Boston operate as fiduciaries, which means they are legally obligated to put their clients' interests and objectives first. Additionally, Birch Hill approaches each portfolio with a long-term view.

The advisors on the Birch Hill team want to see you grow your portfolio through trusted, fundamentally sound principles that square with your risk tolerance. They prioritize long term value and stability over short-term, unsustainable gains.



Birch Hill Investment Advisors

Rating Summary

With a focus on providing expert financial services through a fiduciary lens, Birch Hill Investment Advisors is a competitive force among Boston financial advisors.

Their fiduciary commitment is matched by the firm's strong business values, which include intellectual curiosity, proactively pursuing and solving problems, and successfully helping clients meet their goals.

With a firm foundation of deep industry knowledge, ongoing research, and a value-driven approach, Birch Hill is one of the best Boston wealth management firms to consider this year.

See Also: Top Financial Advisors in Leeds, UK

Boston Financial Management Review

[Boston Financial Management](#) is a financial advisor in Boston that specializes in helping clients achieve their investment goals, with a mission to provide exceptional satisfaction across multiple generations of families.

BFM is a [fee-based](#) Boston financial advisor, but we have included them on this list for the valuable services that they provide for those with at least \$2 million to invest.

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

Large, Multi-Faceted Team

With four decades of experience, the Boston financial advisors at BFM come from multiple disciplines and bring a variety of credentials to the table.

As a result, this top Boston financial investment management firm maintains six different teams to coordinate varying financial areas and provide clients with a complete picture of their finances. These teams include:

- Portfolio Managers
- Investment & Research
- Planning & Trust Services
- Client Service & Operations
- Executive Management
- Administration

In this way, BFM provides an organized internal structure that makes it easy for clients to see exactly who is responsible for each part of the Boston financial investment management process.

Clients can access professional biographies and full contact information for each member of the team, supporting transparency between BFM and its clients.

Little Client Turnover & Generational Trust

Staying true to focus on long-term needs, BFM seeks a high level of client satisfaction across multiple generations.

As a result of this single-minded focus, these Boston financial advisors have enjoyed very low client turnover. The individuals and families working with them know they can trust them.

With this top Boston wealth management firm, you gain an ally who's in it with you through the many ups and downs of the market.

Rating Summary

Although BFM is fee-based, the firm is also a fiduciary, meaning that clients can trust that these Boston financial planners will always act in their best interest.

High-net-worth clients stand to benefit significantly from their large, experienced team and dedication to serving generations of families, earning the firm an overall 5-star rating.

Don't Miss: Best Financial Advisors in New York, NY – Ranking & Comparison

Boston Private Wealth Review

Founded in 1986, [Boston Private Wealth](#) is a Registered Investment Advisor in Boston that serves affluent individuals, family businesses, entrepreneurs, business owners, professionals, nonprofits, and private partnerships.

The firm operates under the umbrella of Boston Private Bank & Trust to provide private banking and lending services along with wealth planning and investment management.

Although our focus is primarily on fee-only advisors, we have included Boston Private Wealth as a fee-based advisor due to their holistic, client-centric approach, supporting their status as one of the elite financial planning and wealth management firms in the country.

Key Factors That Enabled Boston Private Wealth to Rank as a Top Financial Advisor in Boston

Comprehensive Financial Planning Services

As a top Boston financial advisor, Boston Private takes a comprehensive, holistic approach to financial planning, taking both short-term and long-term goals into account.

Clients can benefit from the following financial planning services:

- Investment Advice—These Boston financial planners can advise clients on asset location, portfolio construction and rebalancing, private investments, college funding, and more.
- Financial Decision Making—Clients can gain expert insight on life-changing financial decisions like purchasing a home, debt restructuring, prenuptial agreements, business acquisitions, and more.
- Retirement Planning—This service focuses on strategies for pensions, savings, cash flow, IRA withdrawals, and more.
- Insurance Consultations—These Boston financial planners will review insurance policies and ensure that you have the proper (and most affordable) coverage.
- Tax Planning—Tax professionals can work closely with your Boston financial advisors to provide guidance on estate tax strategies, transaction analysis, and review of tax returns.
- Trust & Estate Planning—All wills, trusts, and gifting strategies will be reviewed to ensure the efficient transfer of wealth.

Experienced and Credentialed

These Boston financial planners have extensive backgrounds in a range of assets such as fixed incomes, international equities, and domestic equities.

Along with their years of experience, the extensive backgrounds of these Boston financial planners make the firm into one of the most sought-after Boston wealth management firms. Professional credentials include:

- Certified Financial Planner
- Chartered Financial Analyst
- Master of Business Administration
- Certified Investment Management Analyst
- Juris Doctor



Best Investment Management Firms in Boston

Rating Summary

Boston Private Wealth provides clients with a deep range of value, including comprehensive financial planning and investment services, highly credentialed staff members, and even private banking services.

Additionally, despite their large size, the firm maintains a boutique approach to keep client-to-advisor ratios low and manageable, making Boston Private Wealth a standout choice among Boston financial advisors.

Ultimately, however, Boston Private receives a 3-star rating due to a lack of transparency regarding fee structure and no evidence of a fiduciary commitment.

While potential clients can evaluate various fees through the firm's [ADV](#), Boston Private Wealth does not explicitly state whether they are a fee-based or fee-only firm, which impacts transparency.

Additionally, while Boston Private maintains strong [company values](#), the firm does not appear to provide a fiduciary commitment to their clients, which would create a legal obligation to act in a client's best interests.

Taking on the role of a fiduciary—and improving transparency with fee structure—could easily improve their rating as a top fee-based Boston financial advisor.

Related: Top Financial Advisors in Calgary, Alberta

Compass Planning Associates Review

[Compass Planning Associates](#) is a wealth management firm in Boston and Wellesley Hill. Their insular team of Boston financial planners offers personalized, one-to-one support to guide clients towards meeting their financial goals.

Compass Planning Associates is an independent, [fee only](#) financial advisor in Boston that provides an accessible, stress-free environment that cultivates open communication.

Key Factors That Enabled Compass Planning Associates to Rank as a Top Financial Advisor in Boston

Financial Advice for Individuals & Families

Individuals may need guidance on how to grow and preserve their wealth, but that financial guidance may also take place within the context of their family's needs.

A Boston financial advisor at Compass can help both individuals and families with life goals like establishing a plan for retirement or saving up funds for your child's college tuition.

This Boston wealth management firm can also help families establish a plan for passing along wealth to ensure their heirs and the family fortune does not get hit with an inordinate amount of taxes or penalty fees.

Financial Advice for Businesses

People don't just require financial guidance in their personal lives - they seek it in their business endeavors as well.

A Boston wealth management firm can help businesses in a number of areas, including their responsibilities regarding retirement benefits, how to cut costs, and even how to set up succession plans to live comfortably when they retire.

As a top financial advisor in Boston, Compass Planning can help business owners with their portfolio management and retirement plans.

Uniquely, this wealth management firm in Boston also provides what they call [Compass MoneyWise Seminars](#), which are educational seminars created specifically with businesses in mind.



Best Financial Advisors in Boston

Rating Summary

Although Compass Planning may be one of the smaller Boston financial advisors on our list, working with a smaller firm provides one-on-one attention that larger financial advisors in Boston often can't provide.

Along with individualized guidance, Compass Planning also maintains a friendly, welcoming, and relaxed atmosphere, making them a perfect choice for clients that are using a Boston financial advisor for the first time.

It's also worth noting that the firm was founded by Jennifer Lane and continues to be staffed entirely by women, marking a stark contrast in an industry where female financial advisors are historically underrepresented.

For clients that value fee-only services and a personalized approach to basic financial services, Compass Planning is one of the best Boston financial planners to consider partnering with.

Popular Article: Best Financial Advisors in Atlanta, Georgia

Congress Wealth Management Review

[Congress Wealth Management](#) is a mid-size, independent wealth management firm in Boston, primarily serving high net-worth clients and their families, endowments, and foundations.

Congress does not explicitly state whether they are a fee-only or fee-based Boston financial advisor, however, they [explain](#) that they "do not receive commissions on transactions and [they] accept no other forms of compensation from investment product providers or financial institutions."

We have included them on this list of the top wealth management firms in Boston due to the services they provide—but as always, we recommend that prospective clients confirm the fee structure.

Key Factors That Enabled Congress Wealth Management to Rank as a Top Wealth Management Firm in Boston

Three-Tiered Process

Congress Wealth Management offers three tiers of financial planning and wealth management.

- [Portfolio Management](#)—A detailed, customized investment plan is drawn up that reflects the client's financial health and future goals. An account administrator is assigned to each client and serves as the primary contact when discussing the client's portfolio.
- [Wealth Management](#)— This is the stage when clients work one-on-one with a Congress financial advisor in Boston. A holistic financial plan is presented to clients and their families.

Areas of concern at this tier include trust planning, estate planning, tax efficiency, financial planning, and endowment and foundation services.

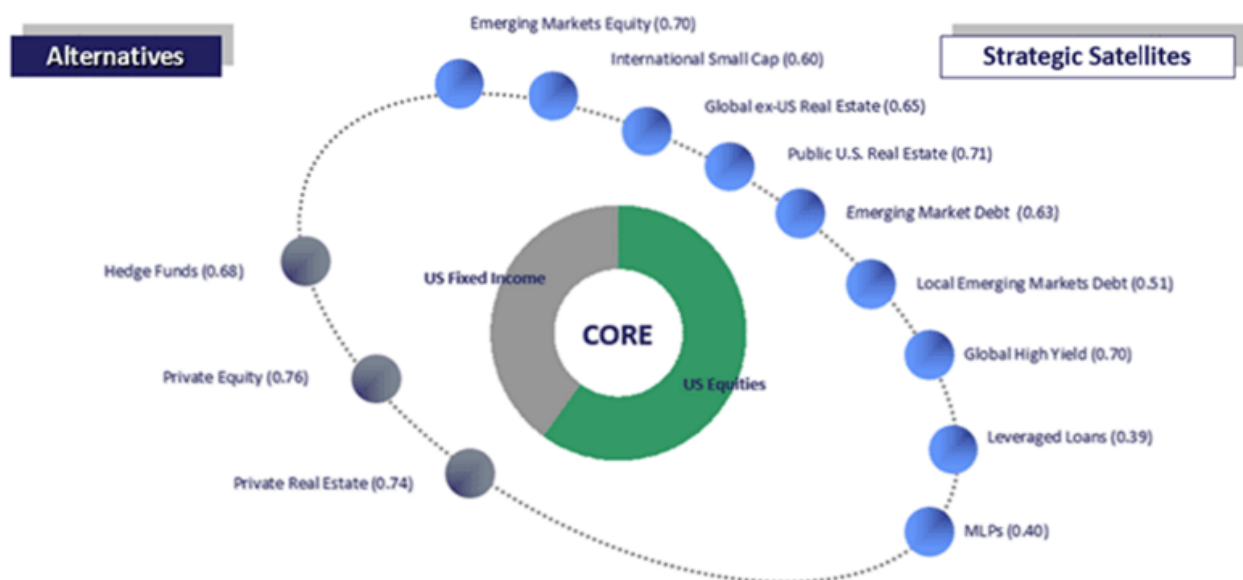
- [Family Office Services](#)—At this phase, Congress financial advisors guide you through the many investment decisions needed to meet your family-related goals. Some of these goals include children's education, wealth transfer, and charitable giving.

Core and Satellite Approach

Congress Wealth Management applies a two-pronged system to maximize your investments while minimizing your risks. The [Core and Satellite Approach](#) represents this Boston financial advisory firm's attempts to diversify your investments and maintain a balanced portfolio.

Core investments include U.S. fixed income, U.S. stocks, and developed market international equities. Satellite investments are comprised of real estate securities, emerging markets, and high yield bonds.

By implementing this two-pronged approach, Congress Wealth Management can compartmentalize and better manage risk. From there, their financial planners in Boston can supplement and strengthen your portfolio with additional investments, accelerating progress towards financial goals.



Boston Financial Investment Management

Rating Summary

With expert investment strategies, an independent mindset, and strong community partnerships, Congress Wealth Management has established itself as a top Boston wealth management firm.

However, we are awarding Congress with an overall 3-star rating due to a lack of transparency regarding fee structure and fiduciary commitment.

While potential clients can evaluate fees through the firm's [ADV](#), Congress Wealth Management does not explicitly state whether they are a fee-based or fee-only firm, which impacts their perceived transparency.

Additionally, while they do take an independent approach to investment management and financial planning, our review found no mention of a fiduciary commitment, which would establish a legal obligation to act in a client's best interests.

Taking on the role of a fiduciary—and improving transparency with fee structure—could easily improve their rating as a top Boston financial advisor.

Read More: Top Financial Advisers (IFAs) in Manchester and Cheshire, United Kingdom

Darrow Wealth Management Review

Established in 1987, [Darrow Wealth Management](#) is a fee-only financial advisor in Boston offering family wealth management and investment advisory services.

As an independent fiduciary, clients of this wealth management firm in Boston can rest assured that they will receive unbiased advice, free from distractions like commissions, transactions fees, or sales charges.

Key Factors That Enabled Darrow Wealth Management to Rank as a Top Financial Advisor in Boston

Client-Centric Philosophy

Darrow Wealth Management maintains a strong philosophy with three distinct, client-centric beliefs:

- **Long-Term Wealth & Creation**—Growing and preserving long-term wealth requires a shared dedication to the process. As a result, these Boston financial advisors focus on gaining a deep understanding of each client’s goals, risk tolerance, and personal situation.
- **Wealth Management as an Evolving Process**—Part of what makes Darrow Wealth Management a successful Boston financial advisor is their ability to recognize that financial goals will change over time. Financial plans created with the firm are made to meet inevitable challenges, evolving along with each client’s needs.
- **Fiduciary Duty**—As fiduciaries, the Boston financial advisors at Darrow Wealth Management are legally obligated to act in the client’s best interest, a practice which extends to all aspects of wealth management and financial planning.

Clients Served

As one of the smaller Boston financial advisors on our list, Darrow Wealth Management narrows their focus to provide expert services to an exclusive group of clients. This includes professionals within the following sectors:

- Physicians and Medical
- Software and Technology

- Biotech and Life Sciences
- Business Owners

While each client brings their own individual financial goals, this top Boston wealth management firm recognizes that these sectors often have unique financial circumstances and is able to tailor their wealth management and financial planning services accordingly.

Rating Summary

As a boutique financial advisor in Boston, Darrow Wealth Management offers clients the unique ability to receive personalized attention from a small, knowledgeable staff.

The firm also excels at providing services to a specific client base, making them an excellent option for those working within medical, software, technology, biotech, and business fields.

With a fee-only structure, fiduciary commitment, and a client-centric philosophy, Darrow Wealth Management is one of the best financial advisors in Boston this year.

Related: Top Financial Advisors in Montréal & Ottawa, Québec, Canada

Lexington Wealth Management Review

Based thirty minutes outside of the city, [Lexington Wealth Management](#) is a financial advisor in Boston that services high net-worth individuals.

As an independent, [fee-only](#) wealth management firm in Boston, their goal is to take the complex, messy, emotional business of financial planning and turn it into a breezier, more strategic process.

Key Factors That Enabled Lexington Wealth Management to Rank as a Top Financial Advisor in Boston

Client-Centric Solutions

Lexington Wealth Management takes a unique approach to defining their service areas, using client profiles and needs to define each service category.

There are four types of clients that this Boston financial advisor serves:

- Next Phase—Services for clients that are facing important financial decisions regarding retirement, estates, home purchases, taking care of family members, and more.
- Ladies—Focused on empowering women through clear, honest, and respectful approaches to inheritance, divorce, family care, and wealth management.
- Entrepreneurs—Boston financial advisors can help busy entrepreneurs manage resources, create stock options and company retirement plans, and consider financial ramifications of a financial plan.
- Simple—For clients that want a simplified approach to financial planning and need help prioritizing, creating, and reaching goals.



Lexington Wealth Management

Embrace of New Technologies

Technology is changing the composition of several industries, and the financial industry is no exception.

This Boston wealth management firm recognizes the importance of staying up to date with the latest advancements in financial technology, providing the latest tools for clients to improve and optimize their portfolios.

This includes assistance with asset allocation and asset location, consolidated performance reporting, Monte Carlo Simulation Analysis, tax strategies, concentrated wealth strategies, and more.

Additionally, LWM is one of the first financial advisors to include a psychiatrist as a part of their team, providing unique expertise in helping clients manage the stress and emotions that come with major life events and financial decisions.

Rating Summary

As one of the top Boston wealth management firms, Lexington Wealth Management takes a multidimensional approach to financial planning.

By understanding what motivates you as well as how you structure your finances, Lexington financial advisors get a clearer picture of your life and relationships. Afterwards, they can integrate and synergize this information into a robust plan designed to meet both financial and personal goals.

With a fee-only structure and a unique, friendly approach to Boston wealth management, LWM earns a 5-star rating as a top Boston financial advisor to consider partnering with this year.

Don't Miss: Best Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota)

McAdam Financial Review

Founded in 2008, [McAdam Financial](#) is now one of the fastest-growing private companies in America, with offices in Philadelphia, Tysons Corner, Chicago, Central New Jersey, and Boston.

With an integrated platform of financial services and tools, McAdam strives to deliver exceptional Boston wealth management by focusing on each client's financial, personal, and professional life.

As a [hybrid RIA](#), McAdam provides a unique fee structure for financial planning and wealth management. This means that the firm provides both fee-only financial planning and fee-based investment management services to clients.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Boston

Advanced Advisory Model™

As the cornerstone of McAdam's financial approach, the Advanced Advisory Model™ integrates three core areas of financial planning: Financial, Personal, and Professional.

This Boston financial advisor defines Financial planning as a combination of Products, Knowledge, Trends, and Opportunities.

Personal financial planning includes Lifestyle, Family, Retirement, and Special Needs, like unique healthcare concerns or family hardships. Professional financial planning looks at four different landscapes: Career, Benefits, Risk, and Investments.

Each aspect of financial planning is both unique and comprehensive, covering many areas that traditional Boston financial advisors may leave out.



McAdam Financial Advanced Advisory Model™

Comprehensive Services

As one of the top Boston financial advisors, McAdam offers clients a wide range of services to take advantage of and improve their financial health.

These services are spread across Financial Planning, Wealth Management, Tax and Insurance Strategies, and Business Owner Services, including (but not limited to):

- 401(k) Strategies
- Retirement, Education, and Estate Planning
- Investment Income Strategies
- Investment Advisory Services
- Tax-Sensitive Investment Management
- Advanced Insurance Architecture
- Actuarial Plan Design
- Business Continuity Planning
- Qualified Retirement Plans
- Key Employee Retention Plans

Rating Summary

With a hybrid pricing structure and a uniquely comprehensive approach to financial, personal, and professional financial planning, McAdam Financial is one of the top financial advisors in Boston to consider partnering with, earning the firm a 5-star rating overall.

With legal [maximum fees](#) ranging from 2.50% for accounts up to \$250,000 and 1.25% for accounts above \$10,000,000, McAdam's investment management fees could potentially be higher than those of competing financial advisors in Boston on our list.

However, the firm's in-depth and unique approach can certainly make the cost worthwhile for many clients, maintaining the firm's position as a top financial advisor in Boston.

To obtain specific information on an individual advisor's average fees, we recommend that potential clients consult directly with a McAdam Financial advisor to receive a fee tailored to their unique financial situation and investment management needs.

Popular Article: Top Financial Advisors in St. Louis, MO

Modera Wealth Management Review

[Modera Wealth Management](#) is a [fee-only](#), independent financial advisor in Boston, with additional offices in Georgia, Florida, and New Jersey.

As one of the best financial advisors in Boston, Modera puts their clients' interests above all by cultivating a relationship that is respectful, educational, transparent, and collaborative.

Key Factors That Enabled Modera to Rank as a Top Wealth Management Firm in Boston

Wealth Management

The Boston financial planners at Modera offer comprehensive wealth management services for their clients. Because no two clients are alike, no two plans are alike either.

Modera clients benefit with integrated coordination when they seek wealth management services from this Boston financial advisory firm. Specific wealth management services include:

- Investment management
- Cash flow analysis
- Retirement income planning
- Tax planning
- Education funding
- Estate planning
- Insurance analysis
- Strategic goal planning

Modera's team of financial planners in Boston will also collaborate with any financial or legal professionals you are currently working with to provide a well-rounded approach to your wealth management.

Comprehensive and Responsive Financial Planning Process

Modera's financial planners follow a streamlined methodology established by this Boston wealth management firm. This process provides organization as well as providing transparency in the client-advisor relationships.

Their [streamlined methodology](#) works as follows:

- Identify, understand, and prioritize personal goals
- Gather plan for financial data
- Analyze and develop financial plan and investment strategy
- Implement recommendations
- Monitor strategies
- Communicate and update changes

Rating Summary

Modera Wealth Management's Boston financial advisors will analyze a client's existing financial situation and have an in-depth conversation with them about their goals for their money.

Whether it's helping clients save for retirement, buying a second home, or planning an extended trip, this financial advisor in Boston puts a strong emphasis on collaborating with clients to create personalized financial solutions.

With an independent mindset, fiduciary commitment, and a fee-only structure, Modera is one of the top financial advisors in Boston to consider partnering with this year.

North American Management Review

Founded in 1928, [North American Management](#) is a [fee-only](#) Boston financial advisor, with a presence in St. Louis, Missouri as well.

With \$1.4 billion in assets under management, NAM is one of the largest financial advisors in Boston to consider partnering with this year.

Key Factors That Enabled North American Management to Rank as a Top Wealth Management Firm in Boston

Dynamic & Flexible Planning

Effective wealth planning involves an understanding of how dynamic and ever-changing both the markets and people's lives can be. Events like divorce or death can drastically alter a person's financial situation—and if their Boston financial advisor isn't adaptive, there can be dramatic implications.

This financial advisor in Boston stays up to date with changes in the financial sector, monitors legal decisions, and stays aware of probate actions to consistently provide their clients with the best possible advice.

The Boston financial planners at NAM also keep track of changes to tax law to ensure their clients' plans are kept on track, regardless of market or life fluctuations.

Investment Management

Investing is a vital part of growing your money for the future and to reach specific financial goals.

North American Management's financial planners in Boston can help their clients with asset allocation, security research and manager selection, and portfolio construction and monitoring.

Factors your Boston financial planner will take into consideration when allocating your assets [include](#):

- Economic and secular trends
- Monetary and fiscal policy
- Global interest rates
- Capital flows

When it comes to investment security, this Boston wealth management firm prioritizes value creating assets. Their team of researchers will analyze potential investments before recommending them to clients, constructing unique portfolios according to:

- Risk tolerance
- Time horizon
- Sources of risk and return
- Investment objectives



Best Investment Management Firms in Boston

Rating Summary

Part of what makes North American Management into a strongly competitive Boston financial advisor is the firm's focus on providing expert financial services with a strong, principle-driven foundation.

The Boston financial advisors at NAM are devoted to serving clients with honesty, continuity of purpose, objectivity, and stability, instilling trust between clients and advisors.

With a fee-only structure and a commitment to supporting clients through an ethical lens, NAM is one of the best financial advisors in Boston to consider partnering with this year.

Conclusion - Top 10 Best Financial Advisors in Boston, Massachusetts

Our list of financial planners and Boston wealth management firms features a wide variety of firms, each with their own unique strengths and advantages.

Regardless of their differences, one thing they all have in common is the desire to secure your wealth ahead of an uncertain future.

This is what drives the Boston wealth management firms on our list to help you better your chances of reaching your life goals.

Whether your goals include funding your children's college educations, enjoying early retirement, or transferring your estate to family members without a hitch, the Boston financial advisors on our 2018 Ranking of Best Financial Advisors can do it all.

Most importantly, they can help you start right now, providing the essential insights and expertise to secure your financial present and future.

Rate Table Disclaimer

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

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