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# **Top 10 Best Financial Advisors in New Jersey | 2018 Ranking | New Jersey Wealth Management Firms**

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## **2018 RANKING & REVIEWS BEST NJ WEALTH MANAGEMENT FIRMS**

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### **Intro: Examining the Top 10 Best Financial Advisors in New Jersey**

Choosing the right financial advisor isn't an easy task. Not only do you have to be willing to have open, honest conversations about money, but you also need to find an advisor that you trust to make good financial decisions on your behalf.

Whether you're building for retirement, saving for a home, or putting money away for your family, establishing a solid partnership with a financial advisor in New Jersey is a great way to ensure that your investments are safe, secure, and poised for growth.

When selecting an NJ financial advisor, you'll want to make sure that they have the expertise, transparency, values, and the services to match your unique financial needs.

For New Jersey residents, we've compiled a list of the best NJ wealth management firms and the best NJ financial advisors to put you on track towards reaching your long-term financial goals.



*Award Emblem: Top 10 Best Financial Advisors in New Jersey*

## AdvisoryHQ's Top 10 Best NJ Financial Advisors | Brief Comparison & Ranking

Best Financial Advisors in New Jersey	Highlighted Features	Ratings
Baron Financial Group	Financial services tailored to women and families with special needs members	5
HIGHLAND Financial Advisors, LLC	Fee-only services and fiduciary commitment	5
Lighthouse Financial Advisors, Inc.	Ethics-driven financial planning and investment philosophy	5
Modera Wealth Management	Strong history of achievement and industry recognition	5
Private Wealth Management Group	Value-driven financial services and wealth management	5

SageBroadview	Tailored services for business professionals and corporate executives	5
Stonegate Wealth Management	Dynamic investment management approach	5
Chartered Financial Services, LLC	Fee-based financial planning strategies	3
HFM Investment Advisors	Focus on empowering clients through communication and education	3
Mullooly Asset Management, Inc.	Collaborative investing and advisement approach	3

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

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

When it comes to choosing the best financial advisor in NJ, there are plenty of firms to choose from. How can you narrow the search?

First, take a close look at what each financial planner in NJ has to offer, and match those services up with your own personal financial goals.

Are you planning for retirement? Have you recently changed jobs? Do you have a recent inheritance or an impending divorce that will affect your financial future?

As you will see in the following reviews for wealth management firms in NJ, each of the best financial advisors in New Jersey specializes in varying areas of financial planning and wealth management.



### *Best Financial Advisors in New Jersey*

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 financial planner in NJ that offers a broader range of services.

Once you've narrowed down your choices to a select few of these top-ranking NJ wealth advisors, see if any of your selected advisors offer 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 NJ before committing to their services.

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## **AdvisoryHQ's Selection Methodology**

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

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

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## **Detailed Review – Best NJ Wealth Management Firms**

Below, please find a detailed review of each firm on our list of the best wealth management firms in NJ. We have highlighted some of the factors that allowed these NJ financial advisors to score so high in our ranking.

- [Baron Financial Group](#)
- [Chartered Financial Services, LLC](#)
- [HFM Investment Advisors](#)
- [HIGHLAND Financial Advisors, LLC](#)
- [Lighthouse Financial Advisors, Inc.](#)
- [Modera Wealth Management](#)
- [Mullooly Asset Management, Inc.](#)
- [Private Wealth Management Group](#)
- [SageBroadview](#)
- [Stonegate Wealth Management](#)

Click below for previous years' rankings:

- **2017 Review:** [Top 10 Best Financial Advisors in New Jersey](#)

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## Baron Financial Group Review

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Located in Fair Lawn, New Jersey, [Baron Financial Group](#) is an independent, fee-only financial planner in NJ.

This top NJ wealth management firm prides itself on comprehensive, personalized service from a highly-qualified team of investment professionals, assigning each client two advisors and a client relationship specialist.

### **Key Factors That Enabled Baron Financial Group to Rank as One of the Best Financial Advisors in New Jersey**

#### **Areas of Client Expertise**

Just as no two NJ wealth advisors are alike, each client brings their own unique financial needs and goals.

As one of the best financial advisors in New Jersey, Baron Financial Group is particularly skilled at serving the following types of clients:

- Retirees
- Individuals and Families
- Women

- Families with Special Needs
- Organizations

What truly makes this NJ financial advisor stand out is their focus on providing tailored services for women and families with special needs, detailed below.

### Women

To provide the best possible [financial services for women](#), this top financial advisor in NJ is dedicated to helping women pursue their dreams on their own terms. This means focusing on education and communication to prepare for life events like:

- Preparing for retirement
- Creating a career
- Investing in yourself
- Caring for children
- Unexpected turns
- Divorce or widowhood
- Caring for elderly parents
- Family needs
- Launching a business

This commitment to providing valuable financial services for women has paid off—Baron Financial Group has received the [Women’s Choice Award](#) consecutively from 2013-2018.

### Families with Special Needs

Baron Financial Group recognizes that families with special needs members have unique—and often complicated—financial goals and requirements.

Coordinating a financial plan between special needs children and their parents isn’t always easy, which is why finding an experienced NJ financial advisor is crucial.

To best benefit these families, this financial advisor in NJ will implement and coordinate the following services:

- Comprehensive financial planning
- Knowledge of eligibility requirements for disability and government programs
- Legal, Education, Care Management, Residential, Benefits, and Income Tax planning



### *Best Financial Advisors in New Jersey*

#### **Expert Asset Management**

As one of the top financial advisors in NJ, Baron Financial Group is committed to designing portfolios to help every client reach their financial goals, which means using an expert approach to asset management.

For this financial planner in NJ, asset management is accomplished through what they call “The Seven Essentials for Portfolio Strategy Success,” which include:

- Diversify across asset classes
- Objective security selections
- Individual bond selections
- Rebalance
- Capitalize on institutional pricing
- Maximize tax efficiency
- Behavioral discipline

Perhaps the most intriguing of all is their commitment to behavioral discipline, or what they call making “decisions based on merit, not emotions.”

This includes choosing to hire—or replace—investment managers and fund managers based on research and analysis to find the best long-term fit, rather than making emotional decisions.

This focus on long-term growth and data-driven analysis makes Baron Financial Group one of the best financial advisors in NJ for residents to consider.

## Rating Summary

As one of the best financial advisors in New Jersey, Baron Financial Group employs a detailed, client-driven investment philosophy to help portfolios reach their maximum potential.

With unique areas of specialty, a fiduciary commitment, and a fee-only structure, Baron Financial Group earns a 5-star rating as one of the top wealth management firms in NJ.

*See Also: [Top Financial Advisors in Miami and Coral Gables, Florida](#)*

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## Chartered Financial Services, LLC Review

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Based in Warren, New Jersey, [Chartered Financial Services, LLC](#) is one of the top fee-based NJ wealth management firms to consider partnering with.

Composed of six advisors and six support staff, the team at Chartered Financial Services is close-knit and experienced, bringing decades of professional experience and certifications to the table.

### **Key Factors That Enabled Chartered Financial Services, LLC to Rank as One of the Best Financial Advisors in New Jersey**

#### **Comprehensive Services**

As one of the best financial advisors in New Jersey, Chartered Financial Services, LLC provides a comprehensive [suite of services](#) to their clients. These services are broken down into three groups, detailed below:

##### Insurance

- Disability Income Insurance
- Life Insurance
- Long Term Care Insurance
- Automobile Insurance
- Homeowner's Insurance
- Umbrella Insurance

##### Financial Planning

- Fee-Based Financial Planning
- Estate Planning Strategies



- Retirement Income Distribution Planning
- Retirement and Legacy Planning

### Investments

- Variable Annuities
- Fixed Annuities
- Brokerage Accounts
- Traditional, Roth, and Simple IRAs

### **Thorough Approach to Financial Planning**

As one of the best financial advisors in New Jersey, Chartered Financial Services employs a thorough approach to provide successful financial planning services for their clients.

This approach relies heavily on a client-centric focus, including:

- Clarifying, quantifying, and identifying your goals to provide a life that has meaning, joy, and financial stability
- Gathering information to assist in making educated and informed decisions
- Establishing critical assumptions for your plan
- Finding the most effective and appropriate tools to implement your strategy
- Identifying expectations for loved ones in the event of a premature death, disability, or long-term care event
- Creating a financial plan with strategies to pursue goals and provide solutions to hidden risks
- Meet with family members, executors, and other advisors upon request
- Periodically update each financial plan to adjust and reprioritize as needed



*Top NJ Wealth Advisors*

### **Rating Summary**

Chartered Financial Services is owned and operated by John R. Benton and his wife and business partner, Nina Benton. In 2011 and 2013, their daughters Emily Benton-Fissel and Sara Benton joined the team.

It's rare to find an NJ wealth management firm that is family-owned and operated, making Chartered Financial Services a best New Jersey investment advisor for clients that want a close-knit, family-oriented environment.

As a fee-based firm, however, Chartered Financial Services has some room for improvement when it comes to transparency. Although there are links pointing potential clients to learn more about what fee-based planning entails, those links were not functional at the time of this writing.

Understanding what to expect in pricing for financial services is not only crucial for potential clients to evaluate a firm but also for transparency, resulting in a 3-star rating for Chartered Financial Services.

***[Don't Miss: Best Financial Advisors in San Antonio and New Braunfels, Texas](#)***

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## HFM Investment Advisors Review

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Serving clients since 1989, [HFM Investment Advisors](#) is an independent, fee-based firm of NJ wealth advisors in Glassboro, New Jersey.

With regular communication and a strong emphasis on education, this New Jersey investment advisor vows to “keep you educated, involved, and confident in every financial decision you make.”

### **Key Factors That Enabled HFM Investment Advisors to Rank as One of the Best Financial Advisors in New Jersey**

#### **R.I.C.H. Approach to Readiness**

As a top financial advisor in NJ, HFM strives to set clients up for success, no matter what their unique financial plan entails.

This means following the [R.I.C.H. Approach to Readiness](#) to “build a community of educated investors who are ready for whatever life throws their way.”

Their unique approach involves a series of financial ethics, discipline, and philosophy through the following steps:

#### Relationship Building

Clients can rest assured that this financial advisor in New Jersey will take the time to thoroughly understand all their financial needs and goals, creating long-term relationships by listening, coaching, and teaching.

#### Inspiring You to Dream Big

No matter what their goal is, HFM is committed to diligently crafting the best financial plan to help clients reach their own success.

#### Coaching Our Investors

For this best financial advisor in New Jersey, empowering clients through education and communication is paramount.

The NJ wealth advisors at HFM will help clients understand their portfolios to better prepare them for financial challenges throughout the investment process, providing confidence and clarity.

## Holding You Accountable

Closely related to coaching is accountability, which means helping clients understand investment strategies and their impact over the long-term.



*Top NJ Wealth Management Firms*

## **Realistic Approach to Retirement**

The thought of retirement can be intimidating, particularly because the process often begins decades in advance.

Clients saving for retirement with HFM benefit from a straightforward, realistic approach, which includes asking questions like:

- What if Social Security pays less than expected?
- What if one person—or both—needs a long-term care facility?
- Is our retirement lifestyle sustainable?
- Can our income keep up with inflation?

With so many unforeseen costs and life events, effectively planning for retirement can be challenging, which is something that this best financial advisor in New Jersey embraces.

## Rating Summary

Financial management services at HFM range from traditional to niche financial services, making them one of the most comprehensive and best financial advisors in New Jersey.

HFM also offers a close-knit, insular staff, making them a great option for anyone looking for a boutique financial planner in NJ. However, compared to other firms on our list of the best financial advisors in New Jersey, HFM does not have a wide range of certified professionals for clients to choose from.

Only two staff members have industry certifications within the financial planning and wealth management industry, which may make it challenging for clients to access industry-specific expertise.

By putting an emphasis on professional development and increasing the certifications among their staff, HFM could easily earn a 5-star rating as a top NJ financial advisor.

**[Related: Top Financial Advisors in Greensboro, Chapel Hill, and Winston-Salem, North Carolina](#)**

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## HIGHLAND Financial Advisors, LLC Review

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Located in Wayne, New Jersey, [HIGHLAND Financial Advisors, LLC](#) is an independent, fee-only financial advisor in NJ.

As one of the best financial advisors in New Jersey, HIGHLAND maintains a thorough, detailed, and personalized process to help high net worth clients reach their financial goals.

**Key Factors That Enabled HIGHLAND Financial Advisors, LLC to Rank as One of the Best Financial Advisors in New Jersey**



**HIGHLAND**  
FINANCIAL ADVISORS

*Best Financial Advisors in New Jersey*

## **Fee-Only & Fiduciary Advisor**

As an independent, fee-only NJ financial advisor, HIGHLAND is committed to offering sound financial advice, not pitching sales.

This means that they do not receive any outside commissions for selling financial products, nor do they sell insurance.

### Fiduciary Commitment

Closely related to fee-only services is the fiduciary commitment that all HIGHLAND advisors have taken.

As a fiduciary, HIGHLAND advisors each have a legal duty to set aside any conflicts of interest to pursue the best financial solution for each and every client.

This commitment shows that HIGHLAND puts client trust and transparency first, making them one of the best financial advisors in New Jersey to consider.

## **The Person is the Plan®**

As one of the best financial advisors in New Jersey, HIGHLAND strives to set clients up for success as early as possible, creating thorough and personalized financial plans.

This proprietary process is called “[The Person is the Plan®](#),” and it includes the following steps:

- **Achieving Your Goals**—Clients and advisors work together to discover, explore, and clarify financial needs to create a plan for retirement, income tax, and investments.
- **Protecting Your Lifestyle**—Advisors discuss potential risks and make recommendations on appropriate coverage plans.
- **Planning Your Legacy**—Clients understand how to reach their financial goals, along with any trusts, wills, or estate planning needs.
- **Meeting Your Unique Needs**—As needed, your advisor will provide additional financial planning services like college planning, business planning, and even executive benefits planning.

## **Rating Summary**

For those on the hunt for a financial advisor, HIGHLAND Financial Advisors offers a strong value proposition.

The firm boasts credentialed and experienced advisors and a client-centric process, earning HIGHLAND a 5-star rating and making them an excellent choice for new and seasoned investors alike.

**Popular Article: [Best Financial Advisors in Seattle, Bellevue, Kirkland \(Washington State\)](#)**

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## **Lighthouse Financial Advisors, Inc. Review**

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Located in Red Bank, [Lighthouse Financial Advisors, Inc.](#) has been a top New Jersey investment advisor since 1999.

As a fee-only, fiduciary NJ wealth management firm, LFA works in the best interest of their clients, forgoing any commissions or kickbacks.

With no minimum or maximum dollar requirement, this NJ financial advisor is open to anyone who needs financial assistance, regardless of their asset size.

### **Key Factors That Enabled Lighthouse Financial Advisors, Inc. to Rank as One of the Best Financial Advisors in New Jersey**

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

As one of the best financial advisors in New Jersey, LFA offers a variety of financial services to their clients, including:

- Portfolio Analysis/Net Worth
- Record Keeping & Spending Plan
- Mortgage Review/Refinance Analysis
- Debt Management, Reduction & Leverage
- Education Planning
- Financial Independence Planning/Retirement Analysis
- Estate Planning
- Rollovers, Pension Plans, Annuities
- Goal Setting
- Investment Implementation
- Life Insurance/Other Insurance Analysis
- Tax Planning/Tax Projection
- Tax Preparation
- Review Employee Benefits
- Financial/Life/Small Business/Entrepreneurial Coaching

#### **Canon of Ethics**

For many investors, finding a trustworthy, principled NJ financial advisor is the best way to ensure that their funds are held responsibly.

As a value-driven financial advisor in NJ, Lighthouse Financial Advisors adheres to a Canon of Ethics, which includes:

- As a fiduciary, LFA will put a client's needs first and foremost
- All agreed-upon work will be completed in a timely and prompt manner
- As fee-only advisors, LFA will act objectively, and will not accept commissions
- LFA will continuously strive to improve their services
- Advisors will maintain the highest level of professional integrity
- All client information is held confidentially to the extent allowed by law

## Rating Summary

Lighthouse Financial Advisors, Inc. is a financial advisor in New Jersey that values and respects the importance of personal relationships. As founder Robert B. Walsh Jr. explains:

*Every day we strive to deliver excellence and outstanding customer service because **we never forget our clients are people with hopes, dreams, desires and fears.** It is my hope that you get to experience our passion, caring, professionalism and dedication to helping you on your unique journey.*

Not many wealth management firms in NJ focus on creating this type of connection, making LFA stand out as one of the best financial advisors in New Jersey and solidifying their 5-star rating.

**[Read More: Top Financial Advisors in Denver, Colorado Springs, and Boulder \(Colorado\)](#)**

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## Modera Wealth Management Review

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[Modera Wealth Management](#) is a fee-only NJ wealth management firm with over \$2 billion in assets, offering financial services to individuals, families, trusts, institutions, and philanthropic organizations.

Their focus is on providing objective advice, personalized attention, and comprehensive resources to help clients with at least \$1 million in investment assets to successfully manage their wealth.

**Key Factors That Enabled Modera Wealth Management to Rank as One of the Best Financial Advisors in New Jersey**



## **Investment Philosophy**

Modera Wealth Management uses a long-term approach to all investments, working closely with clients to foster relationships and encourage portfolio growth.

As defined by this NJ wealth management firm, their investment philosophy consists of four related components, listed below.

### Individualized, Long-Term Approach

Modera creates, implements, and manages diversified portfolios for their clients, ensuring that each portfolio is customized to meet individual financial goals.

### Take No More Risk Than Needed

For this financial advisor in New Jersey, a fulfilling investment experience comes from successfully managing risk.

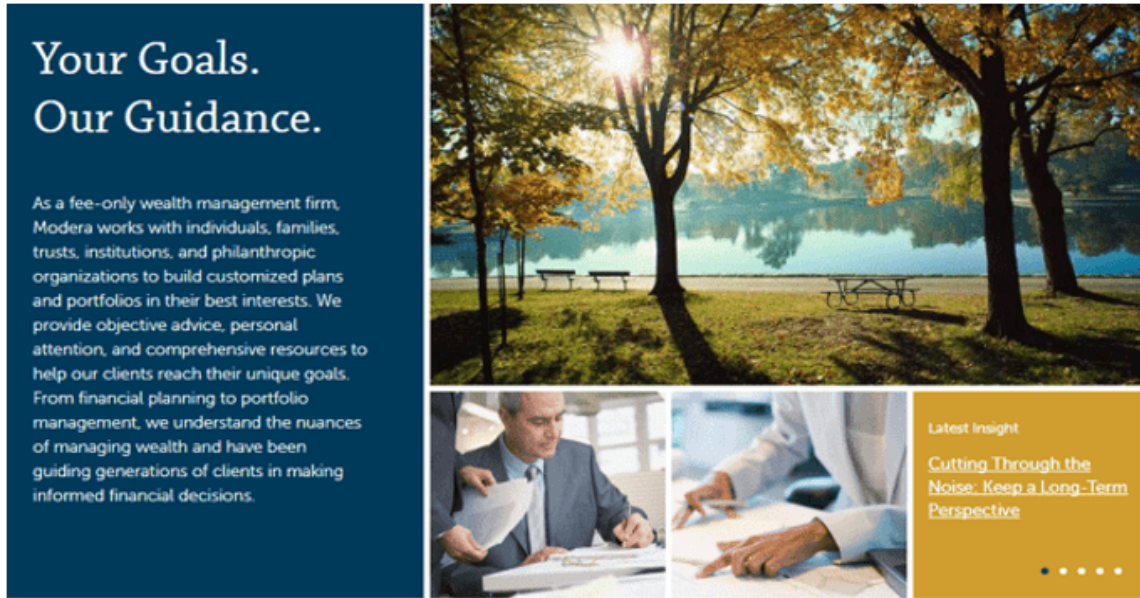
As a result, Modera emphasizes downside protection to construct risk-conscious portfolios, ensuring reliable long-term results rather than unreliable, short-term performance.

### Disciplined Diversification

To reduce volatility and improve risk management, this financial planner in NJ uses disciplined diversification of asset classes for each portfolio. This includes measuring the performance, volatility, and correlation characteristics across multiple asset classes.

### Actively Managed, Individually Delivered

Backed by academic research, Modera maintains that the best way to ensure long-term performance is to actively manage securities. As such, each asset class is thoroughly vetted, acquired inexpensively, and consistently monitored.



### *Top NJ Wealth Advisors*

## **Industry Recognition & Awards**

As a top NJ financial advisor, Modera Wealth Management has accumulated a wide range of [awards and industry recognition](#) for their exceptional financial services. These include:

- Honored by [Financial Advisor](#) as one of the Top 50 Fastest Growing RIAs in 2017
- Featured as one of America's Fastest-Growing Companies by [Inc. Magazine](#) from 2012-2017
- Awarded as one of the 300 Top Registered Investment Advisors by [Financial Times](#) from 2014-2017
- Featured as one of the Best Places to Work in Money Management by [Pensions & Investments](#) in 2012, 2016 & 2017
- Recognized as one of the Top 150 RIA Firms by [Financial Planning Magazine](#) in 2016 & 2017

## **Rating Summary**

As a top-rated NJ financial advisor, Modera Wealth Management applies a client-centric approach to wealth and portfolio management, combining the resources of a large firm with the one-on-one attention of a boutique firm.

With a commitment to independence and a fiduciary duty to always put the client's needs first, Modera Wealth Management is one of the best financial advisors in New Jersey, earning the firm a 5-star rating.

**[Related: Best Financial Advisors in New York, NY – Ranking & Comparison](#)**

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## **Mullooly Asset Management, Inc. Review**

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Founded in 2002, [Mullooly Asset Management, Inc.](#) is a family of fee-only investment advisors located in Wall Township, NJ.

Using what they call “the H.U.M.A.N. Approach,” this top NJ financial advisor seeks to help clients achieve and enjoy “a work optional lifestyle” through calculated, efficient advisement.

**Key Factors That Enabled Mullooly Asset Management, Inc. to Rank as One of the Best Financial Advisors in New Jersey**



*Top NJ Wealth Management Firms*

### **Fiduciary Standard & Fee-Only Services**

Finding a reliable, trustworthy financial planner in NJ often depends upon whether a firm has taken a fiduciary oath.

Mullooly Asset Management operates underneath the fiduciary standard, meaning that they are legally obligated to fully disclose all information and act in each client's best interest at all times.

### Fee-Only

Closely related to the fiduciary standard is Mullooly Asset Management's commitment to offering fee-only financial services.

Clients can rest assured that this best financial advisor in New Jersey maintains fee-only practices and philosophies, meaning that the firm does not receive commissions, kickbacks, or incentives for any financial products.

With fee-only management, clients can rest assured that they are receiving transparent, unbiased advice, as the firm's success is defined by each client's individual success.

### **Investment Management Process**

One unique aspect of the investment management process at Mullooly Asset Management is the focus on collaboration and teamwork. As described on the [firm's website](#):

*The team meets each morning to discuss pertinent market and economic data, review our investment research, and analyze our investment positions. This ensures each client investment position is thoroughly researched and continues to be actively monitored over time.*

This emphasis on collaboration and teamwork also applies to the relationship between advisor and client.

As one of the best financial advisors in New Jersey, Mullooly Asset Management is committed to providing clients with the confidence and fortitude to bypass short-term downfalls and keep their sights on long-term benefits.

### **Rating Summary**

It's rare to find wealth management firms in NJ that are family-owned and operated, which makes Mullooly Asset Management stand out among other competing NJ financial advisors.

Their emphasis on transparency, teamwork, and honesty has given them [second and third generation clients](#), which certainly speaks to the successful connections made between clients and advisors.

While potential clients will find that the small, close-knit team at Mullooly Asset Management provides a personalized financial planning experience, it is worth noting that only one team member carries an industry certification (CFP®).

Professional designations are not only a way to demonstrate that a firm is committed to ongoing education, but also that an advisor is up to date on industry trends. By putting their focus towards ongoing education, Mullooly Asset Management could easily earn a 5-star rating as a top financial advisor in NJ.

***[Don't Miss: Best Financial Advisors in Austin, TX \(RIAs, Wealth Managers, Planners\)](#)***

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## Private Wealth Management Group Review

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Founded in 1998, [Private Wealth Management Group](#) is a fee-only New Jersey investment advisor and financial planner located in Princeton.

As one of the top financial advisors in NJ, Private Wealth Management Group seeks to provide high net worth clients with peace of mind to spend time creating a passionate, fulfilling life, rather than worrying about financial matters.

### **Key Factors That Enabled Private Wealth Management Group to Rank as One of the Best Financial Advisors in New Jersey**

#### **Fiduciary Standard & Fee-Only Services**

Private Wealth Management Group holds themselves to a [fiduciary responsibility](#) within all client advisement, meaning that the firm is always acting in their client's best interest.

According to fiduciary standards, this best financial advisor in New Jersey is also committed to:

- Providing full and fair disclosure of all important facts
- Fully disclosing any potential conflicts of interest

#### Fee-Only

Closely related to the fiduciary standard is Private Wealth Management Group's commitment to offering fee-only comprehensive wealth management.

Clients can rest assured that this best financial advisor in New Jersey maintains fee-only practices and philosophies, meaning that the firm does not receive commissions, kickbacks, or incentives for any financial products.

## **Comprehensive Financial Planning**

To create a complete, individualized strategy, Private Wealth Management Group employs comprehensive financial planning.

It's a holistic approach to establishing goals and creating a manageable plan to achieve those goals, which includes:

- **Client Personal Discovery**—Identify goals, ambitions, and your relationship with money
- **Data Gathering Sessions**—Clarify your personal financial circumstances
- **Investment Education and Investment Policy Statement**—Gain confidence through rational, methodical, and individualized financial decisions
- **Presentation of Financial Analysis and Recommendations**—Receive a comprehensive assessment and detailed action plan
- **Implementation**—Feel secure knowing that your wealth plan is in action
- **Proactive Monitoring and Plan Reviews**—Have the freedom to enjoy your life knowing that your finances are in good hands

## YOUR PERSONAL WEALTH EXPERIENCE



*Top Wealth Management Firms in NJ*

### **Rating Summary**

As a top NJ wealth management firm, Private Wealth Management Group puts a strong emphasis on giving clients the support and educational resources they need to make sound financial decisions.

The Investing Insights and Knowledge Center are both filled with resources on investment philosophies, market reviews, industry commentary, blog posts, and more.

With a firm commitment to transparency, fiduciary duty, and a fee-only structure, Private Wealth Management Group is one of the best financial advisors in New Jersey to consider partnering with this year.

**Popular Article:** [Top Advisors and Wealth Managers in Ohio](#)

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## SageBroadview Review

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One of our picks for the best financial advisors in New Jersey is [SageBroadview](#), a fee-only NJ wealth management, tax, and financial planning firm in Morristown.

Along with their Morristown office, this top financial advisor in NJ also serves clients through their Farmington, CT and Burlington, MA offices.

### **Key Factors That Enabled SageBroadview to Rank as One of the Best Financial Advisors in New Jersey**

#### **Niche Focus on Busy Professionals**

Not all financial advisors in NJ are prepared to handle the unique financial challenges held by busy professionals and business executives—like taxes, employee benefits, or stock options—which is where SageBroadview truly shines.

As a top financial advisor in New Jersey, SageBroadview specializes in serving the needs of:

- Corporate executives/managers
- Medical professionals
- Attorneys
- Small business owners

[As stated by the firm](#), they are best positioned to assist clients “who have experienced accelerated accumulation or successfully transitioned into early retirement.”

Their niche focus on business and corporate professionals makes SageBroadview one of the best financial advisors in New Jersey for busy professionals looking for guidance through an array of personal and business-related financial challenges.

#### **Three-Pillared Approach**

SageBroadview provides a comprehensive client experience by combining Financial Life Planning, Money Management, and Tax Management into one seamless approach.

Perhaps the most beneficial pillar comes from tax management, a financial factor that is often overlooked throughout the financial planning process.



For business professionals, integrating tax management is particularly important. It can help minimize tax obligations, budget for any applicable payments, and ensure that there are no surprises come tax season.

While each category offers its own unique benefits, combining the three creates a unique, holistic approach to financial management.

This three-pillared approach to financial planning sets clients up for success in every aspect of financial planning, making SageBroadview stand out as one of the best financial advisors in New Jersey.

### **Rating Summary**

SageBroadview maintains a strong commitment to honesty, transparency, and client service, making them a great financial advisor in New Jersey for new clients to consider.

In fact, as one of the best financial advisors in New Jersey, SageBroadview prefers to care for a manageable number of clients that can truly benefit from their advisory services, rather than accepting as many clients as possible.

This limitation means that NJ financial advisors can provide personalized attention to financial goals that match their unique skillset, maximizing financial growth and solidifying SageBroadview's 5-star rating.

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## **Stonegate Wealth Management Review**

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[Stonegate Wealth Management](#) is a fee-only investment and financial advisor in New Jersey.

Located in Oakland, this NJ financial advisor is well-equipped to serve a variety of clients, including business owners, inheritors, executives, medical professionals, retirees, and entrepreneurs.

### **Key Factors That Enabled Stonegate Wealth Management to Rank as One of the Best Financial Advisors in New Jersey**

#### **The Stonegate Difference**

There are plenty of advisory and wealth management firms in NJ, but how do you know that you are partnering with the best NJ financial advisor for you?

In the case of Stonegate Wealth Management, there are some very clear advantages to choosing their financial advisory services, which they call “[The Stonegate Difference](#).” These advantages include:

#### Experienced Core Management Team

Part of what makes Stonegate one of the top financial advisors in NJ is the vast range of experience held by the firm.

The senior wealth managers at Stonegate Wealth Management have a combined experience spanning more than 100 years in the financial industry.

#### Sound Principles

This best financial advisor in New Jersey prides itself on remaining effective through two guiding principles: strong client relationships and customized financial plans.

#### Well-Informed, Knowledgeable Clients

The average client base at Stonegate Wealth Management stems from individuals, families, and corporate retirement plans with considerable investment assets.

#### Detailed Approach to Research

For this NJ wealth management firm, research is a key component to the success of the client and of the firm.

As one of the top financial advisors in NJ, all their planning strategies and investment methodologies are based on extensive, up-to-date research.



### *Top NJ Wealth Advisors*

#### **Fiduciary Standard & Fee-Only Services**

It isn't easy to find a financial planner in NJ that you fully trust to responsibly manage your finances.

While part of establishing trust comes from creating a positive relationship between clients and advisors, it also comes as a natural by-product of fiduciary responsibility.

As such, Stonegate Wealth Management abides by a [fiduciary standard](#), meaning that these financial advisors in NJ are committed to disclosing fees and acting in their client's best interests by:

- Providing full and fair disclosure of all important facts
- Fully disclosing any potential conflicts of interest

#### Fee-Only

Clients can rest assured that this best financial advisor in New Jersey maintains fee-only practices and philosophies, meaning that the firm does not receive commissions, kickbacks, or incentives for any financial products.

With fee-only management, clients can rest assured that they are receiving transparent, unbiased advice, as the firm's success is defined by each client's individual success.

### **Rating Summary**

The NJ financial advisors at Stonegate Wealth Management are strong advocates for periodically re-evaluating financial plans. This allows for adjustments as needed and keeps an open line of communication within the client/advisor relationship.

With a continued dedication to putting client needs first and building relationships, Stonegate Wealth Management earns a 5-star rating as one of the top wealth management firms in NJ.

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## **Conclusion: Choosing the Best Financial Advisor in New Jersey for You**

Finding a good financial advisor in New Jersey can place you on the path towards financial security, making financial advisors in NJ essential to successful wealth management and financial planning.

Whether you're looking to begin a retirement fund, save for college, set aside money for your children, or simply learn how to better manage your money, there are plenty of great financial advisors in NJ to choose from.

Before selecting a financial planner in NJ or partnering with an NJ wealth management firm, take the time to evaluate and define your personal financial goals.

By keeping your unique financial needs and goals in mind, you'll be well-equipped to identify the best financial advisor in New Jersey for you.

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## **Rate Table Disclaimer**

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