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# **12 Best Financial Advisors & Wealth Management Firms in Houston, TX | 2019 Ranking**

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## **2019 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN HOUSTON, TX**

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### **2019 Reviews of the Top Financial Advisory Firms in Houston, Texas | Everything You Need to Know**

Houston, Texas is famous for being home to NASA's Mission Control Center, is the most populous city in the state of Texas and fourth most populous in the U.S. And with over 2 million people living there, Houston is a great place to find top financial advisors.

Due to the excellent options that Houston offers for the best wealth management firms, we've expanded our list of the top-rated financial advisors in Houston from 10 to 12 firms this year.



*Top-Rated Financial Advisors in Houston, TX*

Choosing the right organization to trust with your investable assets and financial plan for the future can be difficult if you don't know the things you should look for in a wealth

manager. AdvisoryHQ makes the process easier by providing reviews of the best financial advisors in Houston, as well as in cities throughout the U.S. and U.K...

We'll highlight what makes each financial firm on our list stand out, the fee structure they work under, and the types of clients they serve so you can get a feel for the best Houston has to offer and can narrow down your options.

You'll also find some tips on what to look for in a top Houston wealth management firm so you can make an informed decision and find the best match for your financial needs.



*Award Emblem: Top 12 Best Financial Advisors in Houston, Texas*

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## Top 12 Financial Advisors in Houston, TX | Brief Comparison & Ranking

<b>Best Wealth Management Firms in Houston, Texas</b>	<b>2019 Ratings</b>
Buckingham Strategic Wealth®	5
Financial Synergies Wealth Advisors	5
Horizon Advisors	5

Insight Wealth Strategies	5
Mercer Advisors	5
PartnersInWealth	5
Ronald Blue Trust	5
The Goff Financial Group	5
Willis Johnson & Associates	5
Greenbriar Financial	3
Houston Asset Management, Inc.	3
The Financial Advisory Group, Inc.	3

*Table: Top 12 Financial Advisors in Houston, TX | Above list is sorted by rating*

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## **Things to Look for When Choosing a Top Financial Advisor in Houston, TX**

When it's time to start saving for retirement or seek guidance for investing and growing your wealth, a financial advisor can give you the tools to bring your financial goals to reality.

But where should you start when looking for a good financial planner match? Here are some important things to look for when choosing your perfect financial advisor in Houston.

### **Type of Clients They Work With**

Something that can narrow down your options right away is if a Houston wealth management firm only works with people that have over \$1 million in investable assets.

Some financial advisors in Houston, Texas will work with all wealth levels, while others seek only high-net-worth clients, so whether or not you match their type of client is the first factor to look for.

### **Fee Structure and Transparency**

There are two main fee structures for financial advisory firms, these are Fee-Only and Fee-Based. A firm can also choose to become fiduciary, which is a legal commitment to transparency and putting their client's best interest first always.

Fee-Only means the firm doesn't accept outside commissions from selling financial products, so there aren't any issues with conflict of interest in the investment vehicles they're suggesting.

Fee-Based means the firm does accept 3<sup>rd</sup> party commissions from financial products, so you want to make sure they're also transparent about conflicts of interest. It's also good if a fee-based firm is a fiduciary, which helps counteract the conflict of interest.

### **Range of Available Services**

Not all top Houston financial planning firms will offer the same types of services. Some have more narrow offerings, mainly looking at investments and portfolio management, while others will offer additional services like:

- Tax services
- Financial planning
- Family office services
- Business tailored investment plans
- CPA services
- Financial management specific to women

Knowing which additional services a firm offers can help match them more closely to your particular requirements

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## **2019 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 Wealth Management Firms in Houston, Texas**

Below, please find the detailed review of each firm on our list of 2019 best wealth management firms in Houston. We have highlighted some of the factors that allowed these financial advisors in Houston 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.

- [Buckingham Strategic Wealth®](#)
- [Financial Synergies Wealth Advisors](#)
- [Horizon Advisors](#)
- [Insight Wealth Strategies](#)
- [Mercer Advisors](#)

- [PartnersInWealth](#)
- [Ronald Blue Trust](#)
- [The Goff Financial Group](#)
- [Willis Johnson & Associates](#)
- [Greenbriar Financial](#)
- [Houston Asset Management](#)
- [The Financial Advisory Group, Inc.](#)

Click below for previous years' rankings:

- **2018 Ranking:** [10 Best Advisors & Wealth Management Firms in Houston, TX](#)
- **2017 Ranking:** [Top Financial Advisors & Planners in Houston](#)
- **2016 Ranking:** [Best Investment Firm & Financial Advisors in Houston](#)

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## Buckingham Strategic Wealth® Review

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Founded in 1994, [Buckingham Strategic Wealth®](#) was started on the premise that a Houston financial advisor should always put their clients' interests first. These advisors take an evidence-based, holistic approach to financial planning that's completely transparent.

This wealth management firm in Houston, TX works from a [fee-only](#) basis and is also a fiduciary. They're one of the larger firms on our list of top-rated Houston financial advisors with 26 offices throughout the U.S.

Buckingham Strategic Wealth® works with all types of individuals and families, non-profits, retirement plan sponsors, and dental practice owners.

### **Key Factors that Enabled Buckingham Strategic Wealth® to Rank as a Best Financial Advisor in Houston**

#### **Client-First Approach**

While many financial advisors in Houston, TX are fee-only, the heart of Buckingham's business is the client. Their client-first approach is displayed prominently on their website where they pledge to act always in their client's best interests.

This philosophy is backed up by their fiduciary commitment to be completely transparent and do the right thing for their clients, no matter what. They believe that relationships are built best by proving their client's financial advice that puts their needs at the forefront of every decision.

Their straight-forward three-step approach includes:

- Discovery – getting to know your hopes and dreams
- Planning – creating a resilient and successful financial strategy
- Implementation – staying with you every step of the way and keeping you updated



*Houston's Best Financial Advisory Firms*

## **Financial Insights**

One mark of a great Houston financial advisor is that they make an effort to educate their clients and improve their financial literacy. Backing up Buckingham's client-centric approach is their wide range of financial resources to help clients learn more in multiple financial areas.

From portfolio management to legacy estate planning, you can find a resource to help you learn more about several areas of strategic financial management.

The resources offered by this wealth management firm in Houston include:

- Financial insight articles
- Short films to learn more about Buckingham
- A library of suggested books from national thought leaders
- Foundational materials

Their financial insights articles have something for everyone, here are just a few of the categories:



- Business Planning Strategies
- Education Planning
- Family/Marital Changes
- Healthcare Professionals
- Philanthropic Strategies
- Retirement Plan Solutions
- Risk Management
- Tax Strategies

### **Rating Summary**

With a large, dedicated team of financial advisors and a mission grounded in always doing the right thing for their client, Buckingham Strategic Wealth® stands out as a solid choice among Houston wealth management firms.

They take an evidence-based, transparent approach that starts off their client relationships on a foundation of trust and go the extra mile by taking on fiduciary responsibility.

Their efforts to offer helpful financial resources, further speaks to their client-first philosophy and helps solidify Buckingham's 5-star rating as one of the best financial advisors in Houston, Texas to consider partnering with in 2019.

***See Also: Top Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee***

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## **Financial Synergies Wealth Advisors Review**

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[Financial Synergies Wealth Advisors](#) has been providing financial advisory services in Houston for over 30 years. They're proud to have developed multi-generational relationships with many of their individual, family, and business clients from around the world.

Simplifying your financial life is a cornerstone of this top-rated Houston wealth management firm that is both [fee-only](#) and a fiduciary. They welcome a diverse range of clients, including younger investors with an aggressive investment philosophy, to more mature retirees who prioritize fixed income generation.

**Key Factors that Enabled Financial Synergies to Rank as a Best Financial Advisor in Houston**

## **Pathway® Program**

The Pathway® program is tailored for clients that are in the beginning stages of wealth-building and it's designed to help them develop a customized savings and investment strategy.

Clients can take advantage of cutting-edge technology to gain a full picture of their financial health, receive ongoing advice from a Certified Financial Planner™, and actively monitor the growth of their investment portfolio.

There are two key elements to the Pathway® program:

### Personal Financial Planning

- Develop good saving and investing habits
- Create realistic budgets
- Develop college education plans
- Analyze appropriate life insurance needs
- Maximize employer benefits
- Organize core estate plans
- Maintain ongoing financial planning

### Investment Management

- Globally diversified investment portfolios
- Ongoing monitoring and management
- Disciplined portfolio rebalancing
- Tax-loss harvesting
- Low cost, commission-free ETFs
- Ongoing investment research and analysis
- Comprehensive performance reporting

Pathway fees are straightforward and designed to put quality financial advisory services in reach for many different financial asset levels. For accounts under \$100,000, it's \$79 per month. For accounts great than \$100,000 they use an asset-based fee of 0.95% up to \$1 million and 0.75% over \$1 million.

## **Independent, Fee-Only Structure**

Financial Synergies is an independent financial advisory firm in Houston, TX, that does not receive any commissions or compensation from third-party product providers. This gives clients an assurance that they're getting advice that's completely unbiased.

The firm also takes on fiduciary responsibility and legal commitment to deliver completely conflict-free financial advice. Due to this independence, clients of these Houston financial advisors receive true value for their money, as their interests are placed first and foremost.



## Rating Summary

As a highly specialized firm that offers a boutique experience, Financial Synergies Wealth Advisors provides clients with the ideal financial partnership: fee transparency, conflict-free guidance, and an uncomplicated approach with the client's best needs in mind.

This top Houston financial advisor also provides a proprietary retirement program called The Retirement Salary®. This customized program is designed to provide retirees with a steady income in retirement through a flexible strategic plan.

With expertise that spans multiple investor types, integrated wealth management services, and a fee-only commitment, Financial Synergies scores a top 5-star rating as one of the best financial advisors in Houston to consider working with this year.

***See Also: Top Financial Advisors in Dallas, Texas (Ranking of Dallas Wealth Advisors)***

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## Horizon Advisors Review

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[Horizon Advisors](#) was founded in 1999 and has been serving Houston's high-net-worth population since 1985 through partner CPA firm, Maddox Thomson & Associates, P.C. They are a [fee-only](#) wealth management firm in Houston that also takes on a fiduciary commitment.

This Texas financial advisor takes a proactive approach to wealth management and emphasizes responsiveness to each client's unique needs.

### **Key Factors that Enabled Horizon Advisors to Rank as a Best Financial Advisor in Houston**

#### **All-Inclusive Wealth Management Process**

The experienced Houston financial advisors at Horizon Advisors consider wealth management as an ongoing process that is collaborative and evolving with each client's life changes. This process includes:

- **Understand**: Their first step is to get a complete understanding of you, your family and your finances. Relevant financial documents and information are analyzed.

- **Organization:** A financial advisor in Houston conducts a thorough review of the client's existing financial situation and creates comprehensive recommendations to review with the client.
- **Management:** Once a proposed financial strategy is agreed upon, this financial advisor in Houston will implement and monitor it and make changes as needed.

## **Financial Planning**

For this Houston financial Advisor, financial planning acts as the foundation for their wealth management process.

They assist clients in identifying their personal and financial objectives and craft a customized plan to help their clients reach their goals. The financial planning process of Horizon Advisors includes:

- Cash flow analysis
- Investment portfolio analysis
- Legacy and estate advice
- Tax planning
- Retirement planning
- Risk management



*Best Financial Planners in Houston, TX*

## **Rating Summary**

A unique benefit of working with Horizon Advisors is their deep understanding of how wealth management and financial planning services are connected. The personalized strategies developed by this top-rated Houston financial advisor are crafted with that understanding in mind.

Their client commitment and holistic approach that incorporates varied facets of a person's financial life, including tax services and investment management, make Horizon Advisors one of the top wealth management firms in Houston, Texas to consider this year, earning the firm a 5-star rating.

***Related: Best Financial Advisors in Miami and Coral Gables, Florida***

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## **Insight Wealth Strategies Review**

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[Insight Wealth Strategies](#) is a [fee-based](#) Houston financial advisory firm that has a unique specialization in the oil and gas industry, and specifically Chevron employees. Other client focuses are lab employees and individuals, couples, and families.

This wealth management firm in Houston, Texas also has three offices in California.

While they are fee-based, meaning they accept commissions on financial products, we've chosen them for our top-rated advisors list because they are a fiduciary and offer extensive financial services options.

### **Key Factors that Enabled Insight Wealth Strategies to Rank as One of the Best Financial Advisors in Houston**

#### **Unique Expertise with Chevron Employees**

Houston, Texas is a dominant area in the oil and gas industry and Insight Wealth Strategies understands the distinct financial needs of those working in this industry.

For over 16 years, this Houston financial advisor has worked with more than 300 Chevron employees, managers, and executives, offering objective financial guidance. They even offer a newsletter specifically for Chevron team members.

Financial planning services help these clients make the most out of their benefits package while implementing retirement strategies. Area focuses include:

- Chevron Employee Savings Investment Plan (ESIP)

- Chevron Retirement Plan (CRP)
- Chevron Retirement Restoration Plan (RRP)
- Chevron Deferred Compensation Plan (DCP)
- Chevron Incentive Plan (CIP)
- Impacts from Resource Optimization Management (ROM) & Employee Selection Process (ESP)

## **Vast Array of Services**

There is no lack of financial service offerings from Insight Wealth Strategies. They feel that looking at your situation from every financial angle allows them to make an integrated plan that has the best chance of success.

Some of the services offered by this Houston wealth management firm include:

- 401k Rollover
- Annuities
- Financial Planning
- Investment Management
- Life Insurance
- Long Term Care
- Retirement Planning
- Tax Reduction Strategies

This holistic approach to wealth management is a valuable resource for their clients and offers a more full-bodied approach to financial planning than some other financial advisors can offer.

## **Rating Summary**

Their fiduciary commitment to clients to always put their needs first offsets any potential conflict of interest from accepting commissions, making Insight Wealth strategies an excellent financial advisor to consider in 2019.

Their specialized focus in the oil and gas industry along with an all-encompassing array of services solidify Insight Wealth Strategies as stand out as one of the top financial advisors in Houston, Texas.

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

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## Mercer Advisors Review

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Founded in 1985, [Mercer Advisors](#) was created with a mission of helping clients on their road to economic freedom. This financial advisor in Houston, TX is a [fee-only](#) Independent Registered Investment Advisor (RIA).

Including their Houston location, the firm has over 35 branch locations across the country and serves over 7,000 clients, making them one of the biggest Houston wealth management firms on our top-rated list.

### **Key Factors that Enabled Mercer Advisors to Rank as a Best Financial Advisor in Houston**

#### **Integrated Wealth Management**

Rather than separate financial planning and wealth management services, Mercer Advisors believes that true wealth management starts with financial planning. Their integrated approach includes having a financial planner on your advisory team.

Their holistic approach to wealth management is divided into five categories, which include:

- Investment Management—Investment review, portfolio design, and implementation, risk management, alternative investments
- Tax Planning—Your Houston financial advisor works with an in-house team of CPAs to create proactive tax strategies
- Financial Planning— Goal setting, asset, and liability assessment, cash flow and spending, debt elimination, retirement planning, risk management
- Estate Planning—Tax-efficient distribution planning, intergenerational wealth education, charitable and philanthropic goals
- Corporate Family Trustee—Provides solutions for clients requiring the services of a professional fiduciary



*Top-Rated Houston Financial Advisory Firms*

### **A Scientific Approach**

Rather than being guided by speculation and subjectivity, the Houston financial advisors at Mercer take a reasoned and scientific approach, identifying data over time that shows which characteristics of investments are the most successful.

Data points that are used in this factor-based approach include

- Credit
- Market
- Minimum Volatility
- Momentum
- Quality
- Size
- Term
- Value

### **Rating Summary**

For over 30 years, this award-winning financial planner in Houston, TX has provided experienced and well-rounded financial advice to clients in Houston and throughout the United States.

The makeup of each office gives a boutique feel for their clients while having multiple resources of a large firm through their parent company, Mercer Global Advisors.

With a completely integrated financial approach with specialty services not offered by other firms and a fee-only commitment, Mercer Advisors is one of the top-rated Houston financial advisors to consider partnering with in 2019.

***Related: Top Financial Advisors in Greensboro, Chapel Hill, and Winston-Salem, North Carolina***

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## **PartnersInWealth Review**

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For over three decades, [PartnersInWealth](#) have sought to make wealth management and financial planning as simple and comprehensive as possible. They serve clients with a wide range of backgrounds from business owners to those approaching retirement.

As a member of [NAPFA](#), a leading professional organization for fee-only, fiduciary financial advisors. This Houston financial planner does not accept 3<sup>rd</sup> party commissions for financial products, so you can rely on their advice to be unbiased.

### **Key Factors that Enabled PartnersInWealth to Rank as a Best Financial Advisor in Houston**

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

There are plenty of financial services to choose from when you work with PartnersInWealth. They believe that coordinating all aspects of your financial life can ensure the most optimized strategy for protecting and growing your wealth.

Their services are comprehensively divided into five core areas, which each encompass different aspects of financial needs:

- Collaboration
  - Professional Service Providers
  - Sounding Board
  
- Financial Planning
  - Investment
  - Philanthropic
  - Risk Management
  - Estate & Trusts
  - Tax & Other Expense Reduction



- Execution & Controls
  - myPartnersInWealth (Dashboard & Vault)
  - Acton Summary (SMART to-do list)
- Goals & Monitoring
  - myWealthPlan (Actionable Plan)
  - myWealthPath (Goals vs Actual)
- Legacy Planning
  - Family Governance Program
  - Children Education & Mentoring

## **PersonalCFO**

A concierge aspect to financial planning that PartnersInWealth brings to the table is one that many clients appreciate. These Houston financial advisors are more than just a financial guide—instead, they become a PersonalCFO for their clients.

Clients enjoy having a single point of contact for all their financial needs and can trust that their PersonalCFO will:

- Coordinate all aspects of your personal finances
- Contact you with ideas to build your wealth
- Provide a sounding board for any financial decision
- Work alongside you to create a roadmap to achieving your financial goals
- Proactively implement all financial plans
- Collaborate with other professionals, like accountants and lawyers
- Remain objective at all times, recommending only what is best for you

For those seeking a personalized, one-on-one approach to wealth management and financial planning in Houston, PartnersInWealth is an excellent option for this reason.

## **Rating Summary**

With a comprehensive range of financial services and their status as a fee-only fiduciary, PartnersInWealth offers a full-service approach with financial advice that is objective, unbiased, and made solely in each client's best interest.

Their PersonalCFO approach is unique and encourages long-term relationships and trust, catapulting PartnersInWealth to the top and solidifying their 5-star rating as one of the best financial advisors in Houston to consider working with this year.

***Don't Miss: Best Financial Advisors in Seattle, Bellevue, Kirkland (Washington State)***

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## Ronald Blue Trust Review

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Founded in 1979, [Ronald Blue Trust](#) has a mission to help clients gain clarity and confidence about their finances. Clients are drawn to their unique approach to financial management and the fact that they integrate biblical principles into the work they do.

This Houston wealth management firm is [fee-only](#) and serves clients that may get left behind by other wealth management firms. They work with individuals that generally range in the \$100,000 to \$1 million in investable assets range, whether they need just one or multiple hours of guidance.

### **Key Factors that Enabled Ronald Blue Trust to Rank as One of the Top Financial Advisors in Houston**

#### **Client Divisions**

Taking advantage of the expertise of their team, Ronald Blue Trust has four distinct client divisions, each customized towards the unique financial needs of a particular group. These divisions include:

- [Private Wealth](#)—Comprehensive services serving clients in all 50 U.S. states that have an investable net worth starting at \$1 million
- [Family Office](#)—Focused on the complex needs of multi-generational families typically starting at \$25 million of net worth
- [Professional Athlete](#)—Expert strategies built around the distinct demands and needs of individuals and families in professional sports
- [Everyday Steward®](#)—Financial planning strategies for those just getting started to those with an investable net worth of \$1 million

These separate divisions offered by Ronald Blue Trust highlight their specialties and set them apart from other financial advisors in Houston, Texas.



### *Houston's Best Wealth Management Firms 2019*

#### **Faith-Based Approach**

Rather than focus on how much money can be made, the driving purpose behind Ronald Blue Trust is to enrich their client's lives.

For these Houston financial advisors, enrichment can be achieved by incorporating financial planning and investment management with biblical principles, ultimately leaving a legacy defined by “financial, spiritual, and social capital.”

For clients looking for financial principals that are aligned with their faith, Ronald Blue Trust provides its clients with a unique, biblical perspective on financial management.

#### **Rating Summary**

Ronald Blue Trust stands out as a firm that caters to clients often overlooked by other Houston financial planners. Their client divisions showcase the firm's expertise and value serving a wide range of personal financial needs.

With a singular, faith-based approach and the ability to serve clients of all asset sizes, Ronald Blue Trust is one of the top-rated Houston, Texas financial advisors to consider partnering with this year and earns a 5-star rating.

## ***Popular Article: Top Financial Advisors in New York, NY – Ranking & Comparison***

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### **The Goff Financial Group Review**

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Founded in 1994, The Goff Financial Group was created with a commitment to provide long-term investors with objective and solid financial guidance. They manage over \$285 million in private accounts for investors throughout the country.

This financial advisor in Houston is [fee-only](#) and assures its clients of complete transparency in reporting and throughout their tailored portfolio management.

#### **Key Factors that Enabled The Goff Financial Group to Rank as a Best Financial Advisor in Houston**

##### **Comprehensive Three-Phase Program**

The Goff Financial Group believes that sound relationships are founded on honest and clear communication and this philosophy is put into action in their three-phase program.

This program is designed to start clients off on the right foot and acclimate them to the financial management process. These phases include:

- Planning Your Goals – Discussion and review of your current financial information and long and short-term goals, development of a plan based upon your comfort level and goals
- Reviewing Your Portfolio – Evaluating potential risks, asset allocation, investment performance analysis, customized strategy
- Working Towards Your Goals – Implementation, selling of investments not consistent with your goals, portfolio performance tracking, keeping you informed, working with other advisors like CPAs and estate attorneys

##### **Energy Executive Specialization**

Houston wealth management firms that serve a distinct clientele type offer an additional advantage due to their expertise in handling that group's specific financial requirements.

The Goff Financial Group specializes in serving mid to senior level energy company executives at companies such as Anadarko, Chevron, ConocoPhillips, Exxon Mobil, and others and helping them reach a comfortable retirement.

Some of the ways this wealth management firm in Houston helps energy executives with their financial needs include:

- Develop a comprehensive financial plan
- Implement Diversification Strategies
- Maximize Benefit Plans
- Tax Planning
- Estate and Other Tax Issues

### **Rating Summary**

Their strong history of being a fee-only financial advisor and commitment to giving their clients peace of mind are key strengths of this Houston financial planning firm. They believe in providing tailored solutions that fit each client's unique needs.

With a dedication to building long-term relationships and taking the time to truly understand their client's financial goals, The Goff Financial Group, solidifies their 5-star rating and status as one of the best financial advisors in Houston, TX.

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## **Willis Johnson & Associates Review**

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Award-winning [Willis Johnson & Associates](#) is a financial advisory firm in Houston, TX that specializes in assisting corporate professionals with their financial planning and wealth management needs throughout the typical transitions of corporate life and into retirement.

This Houston wealth management firm is fee-only and as a fiduciary, the firm acts in the best interests of its clients.

One of WJA's main goals is to help its customers to hit their long-term objectives with a strategic asset allocation based on their personalized financial plan.

### **Key Factors that Enabled Willis Johnson & Associates to Rank as a Best Financial Advisor in Houston**

## **Continuous Planning Process**

The Houston financial planners at Willis Johnson & Associates make it a priority to understand where a client is in their life and their finances. Whether their corporate life journey is at their forties, fifties, sixties, or beyond, these top financial advisors in Houston can help clients set a financial path to meet their future goals.

After conducting a thorough analysis, these Houston financial advisors craft a financial plan based on a client's goals, which includes:

- Understanding You: Discussion of the current situation and goals and gathering of personal, financial, and legal information.
- Financial Analysis & Education: Review of your existing resources and how to maximize them.
- Guidance & Implementation: Presentation of several ideas and plans to find the one that will meet your goals best.
- Financial Review: Monitoring of the plan and making continuous adjustments as needed.

## **The ARC of Life**

No matter where you are in life, Willis Johnson & Associates strives to help you through each ARC of Life, organizing their financial planning and Houston wealth management services by each specific decade.

Clients face different issues in their 40s, 50s, 60s, and 70s, meaning the financial strategy used should also differ and reflect their current and future situations. These include:

- Retirement Planning
- Investment Planning
- Estate and Charitable Planning
- Insurance and Liability Planning
- Education Planning

## **Rating Summary**

Willis Johnson & Associates offers a unique value to those in the corporate world and investors transitioning through different events in life. Their fiduciary commitment also assures clients that they are always acting in their best interests.

Their unique age-based approach to wealth management and financial planning in Houston along with their acute awareness of what clients need in each decade of life,

earn Willis Johnson & Associates a 5-star rating as one of the best Houston, TX financial advisors to consider.

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## **Greenbriar Financial Review**

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Headquartered in downtown Houston, [Greenbriar Financial](#) integrates the financial and psychological components of wealth management for high-net-worth individuals and private businesses.

Their fee structure mentioned on their ADV is [fee-only](#), while on their website they mention accepting commissions and working under a [fee-based](#) structure. We always recommend discussing fee structure with a Houston financial advisor to confirm which one is pertinent to your financial guidance.

### **Key Factors that Enabled Greenbriar Financial to Rank as a Best Financial Advisor in Houston**

#### **Comprehensive Wealth Management Services**

Greenbriar Financial offers a wide range of financial services to assist clients with many facets of their financial life. For their Trust Service, they work with an associate company, LPL Financial.

For clients seeking a collaborative and integrated approach that takes their values and risk tolerance in mind, this Houston financial planner offers the following services:

- Financial Advice and Management
- Retirement Plan Options
- Comprehensive Financial Planning
- Severance Package Consultation
- Divorce Financial Analysis
- Investment Management
- Asset Protection Strategies
- Estate Planning
- Trust Services





### *Top-Rated Financial Advisors in Houston*

#### **Partnership with LPL Retirement Advisors**

By leveraging relationships with other experts in the financial arena, top wealth management firms in Houston, TX can offer their clients additional value in particular sectors of their financial needs.

Greenbriar Financial partners with LPL Financial, the nation's largest independent broker/dealer. Their expertise is in the retirement planning sector and they support the needs of retirement plan advisors.

The retirement plans and services offered by Greenbriar Financial through LPL include plans/services with over 45,500 participants in 50 states.

#### **Rating Summary**

With a dedication to understanding the psychological components that impact a client's financial planning, Greenbriar Financial offers a unique approach to wealth management for high-net-worth clients.

We have scored this firm with 3-stars due to the confusing mentions of both fee-only and fee-based and additionally, their website could use more information to help potential clients better evaluate their firm.

That said, Greenbriar Financial offers value-added financial services in a number of areas and is a top Houston wealth management firm to consider partnering with in 2019.

***Don't Miss: Top Financial Advisors in Denver, Colorado Springs, and Boulder (Colorado)***

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

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[Houston Asset Management, Inc.](#) was founded in 1980, making them one of the longest-serving Houston financial advisors on our list. They feel their staff, who really listens and makes clients their top priority, is their greatest asset.

While the firm doesn't explicitly indicate whether they are a fee-only or fee-based wealth management firm in Houston, TX, their [ADV](#) mentions that their advisors may earn commissions, indicating they are working with a fee-based structure.

They also mention taking on a fiduciary duty to protect the best interest of their clients at all times.

### **Key Factors that Enabled Houston Asset Management to Rank as a Top Wealth Management Firm in Houston**

#### **Large, Experienced Staff**

As one of the top-rated Houston wealth management firms, Houston Asset Management considers their staff their best resource. They have a large, diverse team with their own areas of expertise.

With over a century of combined experience, these Houston financial advisors offer with a range of industry certifications, including:

- CFP®
- MBA
- Paraplanner

Their team works in concert to ensure every client and their portfolio has the customized care they deserve.

## **Comprehensive Financial Planning Approach**

This Houston financial planning firm believes in taking a comprehensive approach that includes many areas of a client's financial life. Whether you're planning for a child's education, looking ahead to retirement, or need to manage risk with insurance planning, they can help.

Their robust array of services for their financial clients includes the following:

- Budgeting and Cash Flow Planning
- Business Planning and Employee Benefits
- Education Planning
- Estate Planning
- Insurance Planning (life, disability, long-term care)
- Investments
- Retirement Planning
- Tax Planning

## **Rating Summary**

With an exemplary team with decades of industry experience and professional certifications, clients can rest assured that the Houston financial advisors at Houston Asset Management can provide them with excellent financial guidance no matter what life brings.

While the firm excels at providing clients with a wide range expert financial services, our review found that the firm falls short on transparency and effectively communicating value, thus they've been scored with a 3-star rating.

With additional clarity as to their fee structure, they could easily score higher on a future rating. Despite that, they have a lot to offer clients seeking expert financial advice and are rated as one of the best financial advisors in Houston, Texas.

***Popular Article: Best Financial Advisors in Oklahoma City & Tulsa, Oklahoma***

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## **The Financial Advisory Group Review**

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[The Financial Advisory Group](#) is a boutique Houston wealth management firm that provides individualized wealth maximization strategies. They operate as [fee-only](#) without any potential conflicts of interest.

This financial planning firm in Houston, TX prides themselves on providing services that come from a highly-skilled, versatile, and agile team of financial advisors to a wide variety of clients.

## **Key Factors that Enabled The Financial Advisory Group to Rank as a Best Financial Advisor in Houston**

### **Overall Wealth Management**

Protecting and growing your wealth are key components of financial success. The Financial Advisory Group delivers customized wealth management strategies that discover areas of opportunity, make smart changes, and chart new opportunities.

This top-rated Houston wealth management firm considers the following factors when creating a plan for managing your overall wealth:

- Investments
- Financial instruments
- Estates
- Income tax regulations
- Risk management
- Insurance
- IRAs
- Retirement plans

### **Financial Planning Advantage**

The importance of optimizing tax planning with financial planning cannot be overstated for the best chance of financial success.

With a step-by-step plan to maximize your financial outcome, this Houston wealth management firm covers a wide variety of services:

- Retirement saving
- College funding
- Budgeting
- Cash flow
- Taxes
- Will and estate planning
- Income
- Expenses
- Investments
- Assessment of risk
- Qualified pension plans
- IRAs
- Various types of insurance

## Rating Summary

The Financial Advisory Group offers personalized value to its clients in a conflict-free, fee-only structure, giving them the security of knowing this Houston wealth management firm is completely attuned to their distinct financial needs.

We've scored this firm with 3-stars, due to their slightly outdated website that could use more details on their firm to help potential clients make an informed decision. An update to their site could easily score them higher in the future.

Their custom approach and highly experienced team of Houston financial advisors make The Financial Advisory Group an excellent option to consider in 2019 for your financial planning needs.

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## Conclusion— 2019 Top 12 Financial Advisors & Wealth Management Firms in Houston, TX

As you can see, there is a wide range of expert financial advisors and wealth management firms serving Houston, Texas residents. These 12 top firms have a lot to offer both in their depth of services the clientele specialties.

Whether you work in the corporate world, need private business services, are employed in the energy industry, or need assistance transitioning through life's changes, there's a Houston financial advisor on this list that's a perfect fit.

Our advice is that once you've narrowed down the firms you're most interested in, make a list of all your financial concerns, such as income, liabilities, goals for the future, and bring that to your initial meeting to facilitate the discussion.

We hope that the information we've provided here serves you well along your journey to a bright and secure financial future.

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## Rate Table Disclaimer

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Image sources:

- <https://pixabay.com/en/office-building-houston-texas-3939138/>
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