
10 Best Indianapolis Financial Advisors & Wealth Management Firms | 2019 Ranking

2019 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN INDIANAPOLIS, INDIANA

2019 Top-Rated Wealth Management Firms in Indianapolis

When you want to grow your nest egg for the future, whether it's for retirement, to save for a child's education or another financial objective, finding the right Indianapolis financial advisor can be an arduous, yet rewarding task.

Many people worry that they're going to trust the wrong people with their money or show up at the door of a top-rated wealth management firm in Indianapolis, IN and be turned away because they don't have enough money to invest.

The whole process can be intimidating if you aren't sure what to look for in a good Indianapolis financial advisory firm or aren't familiar with the initial client-advisor process.

AdvisoryHQ aims to remove the anxiety and make your search for a financial planning partner easier by ranking the top wealth management firms in Indianapolis (and areas throughout the U.S.).

For our top 10 list of the best financial advisors in Indianapolis, we've ranked firms according to several factors, these include:

- Fee structure
- Reputation
- Client flexibility
- Value-added services
- Areas of special interest
- Commitment to trust & transparency



Award Emblem: Top 10 Best Financial Advisors in Indianapolis

This guide is designed to give you important information about choosing a financial planning firm in Indianapolis to help narrow down your options and make the whole process much easier.

Everyone deserves a chance to find expert financial guidance to help them make their dreams for the future a reality, and once you understand the financial planning process, it becomes much less intimidating.

Top 10 Best Financial Advisors in Indianapolis, IN | Brief Comparison & Ranking

Best Indianapolis Financial Advisors	2019 Ratings
Avalon Wealth Advisory	5
Bedel Financial Consulting, Inc.	5
Buckingham Strategic Wealth	5
Castle Wealth Advisors, LLC	5
Column Capital	5
Halter Ferguson Financial, Inc.	5

Market Street Wealth Management Advisors, LLC	5
Ronald Blue Trust	5
Valeo Financial Advisors, LLC	5
Deerfield Financial Advisors, Inc.	3

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

What Should You Look for in a Top Indianapolis Financial Advisor?

Each financial advisory firm is unique, and you can help to narrow the field of contenders by looking at a few different factors.

The following questions will help you find the differentiating traits in an Indianapolis wealth management firm that will bring you closer to your perfect match.

What is their fee structure?

Indianapolis financial planning firms can be fee-only or fee-based. Fee-only has a higher standard of completely being committed to the client and it means that they don't accept any outside commissions or incentives from companies that sell financial products.

A fee-based financial advisor in Indiana may accept some form of compensation from the sales of financial products. Many fee-based firms also become fiduciaries to counteract any conflict of interest. A fiduciary is legally obligated to act in their client's best interest.

What Asset Level Does the Financial Advisor Work With?

You'll save yourself a lot of time by initially looking at the clientele type a firm works with. Some work with all wealth levels and others only work with wealthy individuals with \$1 or \$2 million to invest.

Do Their Services & Specialties Match My Needs?

Indianapolis financial advisory firms will often specialize in a variety of financial planning areas. One may work mainly with retirees or those planning for retirement, while another may offer special services for business owners or executives.

Do a thorough review of any potential financial advisor's services list to see if they match what you're looking for.

What's their Personality?

Are you looking for a “button-up” suit-wearing financial advisory firm or do you prefer a more laid-back atmosphere? You can learn a lot about a firm’s personality and how well it may match your own by looking over their website as well as any videos they have.



Best Wealth Management Firms in Indianapolis, Indiana

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.

Detailed Review – Best Wealth Management Firms in Indianapolis

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

- [Avalon Wealth Advisory](#)
- [Bedel Financial Consulting, Inc.](#)
- [Buckingham Strategic Wealth](#)
- [Castle Wealth Advisors, LLC](#)
- [Column Capital](#)
- [Halter Ferguson Financial, Inc.](#)
- [Market Street Wealth Management Advisors, LLC](#)
- [Ronald Blue Trust](#)
- [Valeo Financial Advisors, LLC](#)
- [Deerfield Financial Advisors, Inc.](#)

Click below for previous years' rankings:

- **2018 Review:** [10 Best Indianapolis Financial Advisors & Wealth Management Firms \(+ 1 to Avoid\)](#)
- **2017 Review:** [Top 10 Best Financial Advisors in Indianapolis](#)
- **2016 Review:** [Top 10 Best Financial Advisors in Indianapolis](#)

Avalon Wealth Advisory Review

With a mission to offer objective and comprehensive financial advice, [Avalon Wealth Advisory](#) is an Indianapolis-based wealth management firm that helps individuals and families that are looking for an expert to help them manage their finances.

The firm is a [fee-only](#) financial advisor in Indianapolis and also a fiduciary, making a legal commitment to always put their client's best interest ahead of their own.

Key Factors That Enabled Avalon Wealth Advisory to Rank as a Top Financial Planner in Indianapolis

Robust Range of Services

You have multiple financial services options when working with this top-rated financial advisor in Indianapolis. Firms offering wealth management services, beyond just investing or retirement planning, add to convenience and cost savings.

To meet the ever-changing needs of their clients, Avalon Wealth Advisory provides a diverse range of services, including:

- Investment Planning

- Retirement Planning
- Business Succession Planning
- Estate Planning
- Financial Planning After a Divorce or Death
- Insurance and Risk Management
- Education Planning

Each service from this Indiana financial planning firm is completely client-centered. Advisors take time to learn about their client's unique needs, goals, and financial experiences before getting to creating a customized financial plan.



Indianapolis, Indiana's Top Financial Advisors

Client-Centric Commitment

As a fee-only financial advisor, the Avalon only receives compensation directly from clients and not any third parties.

Not only does this eliminate the inherent conflicts of interest that often come from commission-based models, but it also ensures there are no hidden agendas and creates a strong foundation of trust and transparency.

Clients can also benefit from each of these Indianapolis financial advisor's strong commitment to:

- Building relationships with clients

- Providing the best quality of service
- Customizing financial services to unique client needs
- Accommodating the most convenient times and locations for client meetings
- Working as a team and respecting the talents and experience of other advisors
- Offering tailored solutions for each client
- Fair service pricing

Rating Summary

If you're looking for an experienced team of Indianapolis wealth managers, the staff at Avalon has over a century of experience in helping their clients reach their financial goals.

Additionally, each Indianapolis financial advisor at the firm is a Certified Financial Planner (CFP®), further exemplifying their dedication to providing the best experience for their clients.

With a client-focused mission, a wide range of financial services, and an expert team, Avalon Wealth Advisory solidifies their 5-star rating as one of the best financial advisors in Indianapolis to consider partnering with in 2019.

See Also: Top Financial Advisors in St. Louis, MO

Bedel Financial Consulting, Inc. Review

Committed to giving clients confidence and peace of mind, [Bedel Financial Consulting, Inc.](#) was named as one of the top 25 woman-owned Registered Investment Advisors in the country by WealthManagement.com.

As a [fee-only](#) financial advisor in Indianapolis that is also a fiduciary, Bedel Financial values long-term relationships and serves high-net-worth families, young professionals, and affluent entrepreneurs, business owners, doctors, lawyers, CEO's, professional athletes, and more.

Key Factors That Enabled Bedel Financial Consulting, Inc. to Rank as One of the Top Financial Planners in Indianapolis

Balanced, Comprehensive Strategy

To give clients a well-rounded and comprehensive experience, Bedel Financial takes a balanced approach to financial health, integrating financial planning and investment management.

Each client benefits from their own personal team of one financial planning expert and one investment management professional to ensure that the financial planning experience is both holistic and covers all aspects of their financial life.

You know you're getting an experienced team of professional when working with this Indianapolis wealth management firm because the staff at Bedel Financial consists of both CFP® and CFA professionals.

Customized Services

The Bedel Financial Consulting team helps clients understand and plan for their future through a highly customized process. They take time to get to know each client and their distinct financial objectives so they can create the best plan for success.

Their services cover financial challenges such as:

- Comprehensive Wealth Management: Combines financial planning and investment management services into one integrated plan to manage and grow your assets.
- Retirement Focus Planning: This financial advisor in Indianapolis offers a toolbox of services to analyze your ability to retire and implement processes to ensure you meet your retirement goals.
- Young Affluent Professionals: The GenerationNeXt™ of Bedel financial advisors guide a younger generation (clients between the ages of 25-40) towards an affluent path, establishing a solid financial foundation for their life.

Rating Summary

Bedel Financial Consulting stands out as a top financial advisor in Indianapolis due to their commitment to serving clients and their detailed and personalized service. They also serve a wide range of clientele from young professionals to retirees to families.

With an experienced team, a comprehensive approach to wealth management, and a fiduciary commitment, Bedel Financial Consulting scores a 5-star rating as one of the best financial advisors in Indianapolis to consider working with this year.

Don't Miss: Top Financial Advisors in Kansas City, Leawood, and North Kansas City

Buckingham Strategic Wealth Review

Started with a pledge to always act in their clients' best interests, [Buckingham Strategic Wealth](#) is a financial advisor in Indianapolis that's been serving individuals, families, institutions, plan sponsors, and dental practice owners for over 25 years.

This fiduciary and [fee-only](#) Indianapolis wealth management firm is one of the largest on our list, with 33 offices throughout the United States.

Key Factors That Enabled Buckingham Strategic Wealth to Rank as One of the Best Financial Advisors in Indianapolis

Broad Range of Financial Services

When choosing one of the best financial advisors in Indianapolis, many clients like to work with a firm that can handle multiple financial needs, rather than just investments.

Buckingham Strategic Wealth offers clients a broad range of investment management and financial planning capabilities.

As financial goals and objectives may fluctuate over time, these Indianapolis financial planners are well-prepared to handle a variety of financial needs, including:

- Wealth Management
- Business Practice & Transition Planning
- Portfolio Construction
- Retirement Planning
- Wealth Transfer & Legacy Goals
- Tax Planning
- Insurance Policy Evaluation
- Fixed Income Portfolio Creation
- Social Security Optimization Strategies
- College Savings Plans
- Multigenerational Wealth Coordination
- Charitable Gift Planning
- Coordination with Other Consultants (CPA, etc.)

Financial Planning for Nonprofit Organizations

This financial advisor in Indianapolis is fully experienced at understanding the different layers of responsibility that come with managing a nonprofit.

Buckingham advisors offers institutions a solid investment strategy geared towards long-term stability that board members can comfortably stand behind. Their goal is to make the lives of nonprofit leaders easier and even more rewarding.

These Indianapolis financial advisors support board members and trustees with educational guidance that goes beyond just core financial services. Their goal is to help clients feel confident about doing the best thing for their organization and those it serves.



Best Financial Planning Firms in Indianapolis, IN

Rating Summary

For those individuals, families, and institutions that are looking for the gold standard in ethical commitment to serving their clients, Buckingham Strategic Wealth is an excellent option. They take a client-centric approach to providing clients with unbiased, and uncompromised advice.

With a wide range of value-added services, and experienced team, and the resources of multiple offices, Buckingham Strategic Wealth solidifies their 5-star rating as one of the best financial advisors in Indianapolis to consider partnering with this year.

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

Castle Wealth Advisors, LLC Review

With a client-centered focus and personal approach, [Castle Wealth Advisors, LLC](#) offers clients the benefit of working with three companies in one: Castle Financial Group™, Castle Investment Advisors™, and Castle Valuation Group™.

This [fee-only](#) Indianapolis wealth management firm has been serving individuals, families, and businesses throughout the U.S. for over 40 years.

Key Factors That Enabled Castle Wealth Advisors, LLC to Rank as a Top Indianapolis Wealth Management Firm

The Value of Three in One

Castle Advisors brings a unique value to the table for those looking for Indianapolis wealth management services with the power of its three separate divisions:

- [Castle Financial Group™](#): As the oldest company in the family, they consider themselves the “architect,” designing financial blueprints to protect and grow client’s wealth. They handle taxes, gifting, estates, business succession, and retirement.
- [Castle Investment Group™](#): This branch is an SEC-registered investment advisory firm, and they oversee personal assets, charitable trusts, pensions, retirement assets, and family foundations to help clients invest wisely.
- [Castle Valuation Group™](#): Preparing business valuations for closely-held companies is the main objective of this division. They handle both public and private companies through a thoughtful and strategic approach.

Business Succession Planning

For business owners contemplating selling or passing on their business to the next generation, this Indianapolis financial advisor can help with a smooth transition.

Castle Wealth Advisors specializes in helping business owners achieve optimal success in selling or passing down their company. Services include (but are not limited to):

- Business valuation
- Developing a succession plan
- Minimizing income taxes
- Reviewing documents with your attorney

- Preparing a detailed transition report
- Estimating retirement income

Rating Summary

As a fee-only Indianapolis wealth management firm, Castle Wealth Advisors offers a strong commitment to their clients that all advice given is completely unbiased and free of conflicts of interest.

With personalized family office services, business financial planning, a holistic approach, and the power of three distinct companies rolled into one, Castle Wealth Advisors earns a 5-star rating as one of the top Indianapolis financial advisors to consider working with in 2019.

Popular Article: Best Financial Advisors in Seattle, Bellevue, Kirkland (Washington State)

Column Capital Review

[Column Capital](#) was founded in 2005 and serves approximately 300 clients from their Indianapolis, Indiana office. An additional benefit they offer clients is that their Column Family Office division is a licensed accounting firm, providing tax preparation and representation.

This [fee-only](#) financial advisory firm in Indianapolis works with high-net-worth individuals and families to offer a complete solution to address all their wealth management needs.

Key Factors That Enabled Column Capital to Rank as a Top Financial Advisor in Indianapolis

Comprehensive Wealth Planning Approach

An integrated financial plan includes an understanding of your goals, your current cashflow, your retirement plans, and your tax situation. This makes an Indianapolis financial planning firm that can address all those important components an excellent value to clients.

Column Capital's approach to wealth management integrates three key processes: investment management, financial planning, and income tax planning, ensuring that all three areas are working in concert to fulfill your financial plans for the future.

In their excitement to realize capital gains, individuals often overlook tax obligations that could drastically cut their earnings or the wealth they put aside for their heirs.

The Indianapolis financial advisors at Column Capital offer a comprehensive approach by understanding your financial goals and then working diligently to align their services appropriately.



Top-Rated Wealth Management Firms in Indianapolis, Indiana

Investment Management

Column Capital takes a client-focused approach to the investment process. They don't try to gamble with the market, but rather take a strategic approach to capture maximum after-tax returns, taking a client's risk level into consideration.

Through a combination of experience, expertise, research, and technology, this Indianapolis financial advisor helps clients with portfolios that continue to fulfill their goals no matter what unpredictability the market may bring.

They do this by:

- Reviewing and prioritizing goals and objectives
- Establishing a target asset allocation
- Preparing an Investment Policy Statement
- Implementing customized investment strategies
- Reviewing and evaluating the investment portfolio regularly

Rating Summary

Taking a strategic, straight forward approach, Column Capital provides clients with the peace of mind that their wealth management and financial planning are handled with care, trust, and transparency.

With a broad array of financial planning and investment management services and the ability to integrate tax planning in to their strategies, Column Capital solidifies their 5-star rating as one of the top financial advisors in Indianapolis to consider partnering with in 2019.

Read More: Best Financial Advisors in New York, NY – Ranking & Comparison

Halter Ferguson Financial, Inc. Review

[Halter Ferguson Financial, Inc.](#) has been providing expert financial planning and wealth management services to individuals and families in Indianapolis and the Central Indiana area for over 30 years.

This top Indianapolis financial advisory firm is a [fee-only](#) Registered Investment Advisor (RIA) that is also a fiduciary, meaning they have a legal obligation to serve their client's best interest and to be completely transparent.

Key Factors That Enabled Halter Ferguson Financial, Inc. to Rank as One of the Top Indianapolis Financial Advisors

The Halter Ferguson Process

There is so much financial advice out there from friends, family, and the internet that it can be difficult to sort through the fact from the fiction.

Halter Ferguson Financial understands this and guides its clients towards the essential information that will serve them well and help them get where they want to go.

This top-rated Indianapolis wealth management firm's ultimate goal is to help clients see that financial planning doesn't have to be complicated. Their team of financial advisors in Indianapolis assist clients with things like:

- Consolidating their accounts
- Determining if different accounts are strategically working towards a client's goals

- Keeping clients focused on their long-term objectives
- Organizing and reviewing multiple aspects of their financial picture

Financial Planning Services

Halter Ferguson doesn't take a "cookie-cutter" approach to financial planning. They provide custom-tailored solutions based on both quantitative and qualitative information, to establish a strong foundation for the future.

Like any good financial plan, it will be flexible, integrated, and reviewed regularly to reflect personal and economic changes. Planning services include:

- Personal Financial Statement
- Financial Plan
- Plan Implementation
- Retirement Planning
- Insurance Needs Analysis
- College Funding
- Estate Planning
- Income Tax Planning
- Employee Benefit Analysis
- Savings Plan
- Expense Tracking
- Access to Software

Rating Summary

For people that appreciate the personalized attention that a smaller firm can give, Halter Ferguson will be a perfect fit. Their experienced team of Indianapolis financial planning professionals work to make the financial management process easy and comprehensive.

With a wide range of financial planning services and a goal of creating lasting positive impact in their clients' lives, Halter Ferguson scores a 5-star rating as one of the best financial planners in Indianapolis to consider partnering with this year.

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

Market Street Wealth Management Advisors, LLC Review

Helping to simplify financial management with a straightforward approach, [Market Street Wealth Management Advisors, LLC](#) serves individuals, businesses, private foundations, pensions, and profit-sharing plans. They have two offices in Indiana, in Indianapolis and Crawfordsville.

The firm is a [fee-only](#) wealth management firm in Indianapolis that considers their clients family. They enjoy working with them collaboratively to help them make smart choices for a more confident tomorrow.

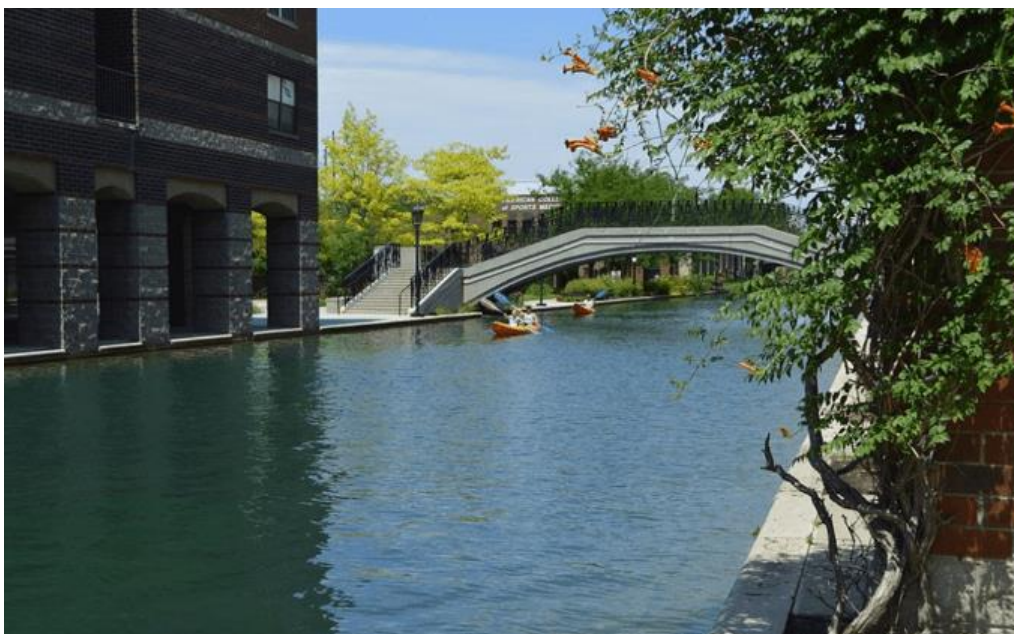
Key Factors That Enabled Market Street Wealth Management Advisors, LLC to Rank as One of the Best Financial Advisors in Indianapolis

The Market Street Difference

Every top Indianapolis financial advisory firm has its own unique set of core values and philosophies that guide their work with clients in helping them protect and grow their wealth.

Below are some of the key philosophies that Market Street Wealth believes set them apart from other Indianapolis financial advisory firms:

- We Aren't Salespeople. We're Coaches: Their financial advice is never biased, and they take the time to carefully coach each client
- We Believe in the Power of Collaboration: Advisors are dedicated to working side-by-side with clients to create personalized solutions that work
- Our Clients Are Family: Each financial management relationship is built to maintain long-term financial health through multiple stages of life



2019's Best Financial Advisors in Indianapolis, IN

Retirement Plans and Consulting Services

Administering a company retirement plan is a large undertaking. Market Street Wealth can make the job easier by offering expert advice and standing with you as co-fiduciary for your plan.

Through the use of independent Third-Party Administrators (TPAs), these financial advisors in Indianapolis put an emphasis on representation from a range of asset classes and fund families.

Performance is continually monitored, recommendations are made as needed, and employee education is offered to ensure long-term success.

Rating Summary

When it comes to taking the complexities of financial management and distilling them down into simple and comprehensive advice, Market Street Wealth is a standout in their field. Additionally, their client-first focus ensures you're getting completely unbiased advice.

With a strong emphasis on collaboration, a welcoming family atmosphere, and straight-forward approach, Market Street Wealth Management Advisors earns a 5-star rating as one of the top financial advisors in Indianapolis to consider working with in 2019.

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

Ronald Blue Trust Review

With a mission to help their clients live with clarity and confidence about their money, [Ronald Blue Trust](#) is an Indianapolis wealth management firm that serves clients of all wealth levels. They have four divisions and 14 offices across the U.S.

This [fee-only](#) Indianapolis wealth management firm is unique in that they integrate biblical principles into financial planning to help their clients become better stewards of their wealth and improve their relationship with money.

Key Factors That Enabled Ronald Blue Trust to Rank as a Top Indianapolis Wealth Management Firm

Four Distinct Divisions

Clients benefit from four distinct divisions offered by this Indianapolis financial advisory firm. To meet the unique needs of each client, Ronald Blue Trust maintains the following niche divisions of financial management:

- [Private Wealth](#): As the largest of the four, this division offers comprehensive planning services to clients with an investable net-worth starting around \$1 million.
- [The Family Office](#): Focusing on the complex needs of multiple generations, this division assists families with multiple financial needs and governs sophisticated trust and estate plans.
- [Professional Athlete](#): Designed to help athletes build and retain wealth during a traditionally shorter career span through cash flow management, estate planning, investment management, tax planning, risk management, and more.
- [Everyday Steward](#): Focuses on clients who are just starting their financial journey, with services that include everything from cash flow management to retirement. Clients in this category generally have a net worth of \$100,000 to \$1 million.

Managing Your Investments

The expert advisors at Ronald Blue Trust don't just create a plan to meet financial goals, but one that will increase the probability that your goals and dreams will be reached.

This Indianapolis financial advisory firm does not use random benchmarks, they utilize a Principled Reasoning approach through:

- **Environment:** The principle of Uncertainty and Instability shows that economic environments are numerous and it's important to manage risk and reinforce the value of saving money.
- **Growth:** The principles of Human Productivity, Leadership, and Governance bring insight into how and where asset growth will most likely appear.
- **Valuation:** The principle of Inherent Value allows Ronald Blue to analyze various asset types to build a disciplined and customized portfolio.

Rating Summary

Clients that appreciate the injection of biblical principles and the tenants of faith into their financial planning strategy will find Ronald Blue Trust an excellent match for their foundational values.

With a large, dedicated team, a comprehensive approach, and the ability to serve multiple wealth levels, Ronald Blue Trust solidifies their 5-star rating as one of the top financial advisors in Indianapolis to consider partnering with this year.

Valeo Financial Advisors, LLC Review

With a commitment to transparency and client service, [Valeo Financial Advisors, LLC](#) has a limit of 40 clients per advisor to ensure personalized service. They serve clients in Indianapolis, Indiana as well as over 40 states in the U.S.

Valeo is a [fee-only](#) Indianapolis wealth management firm that believes in taking an integrated approach to financial planning that includes more than just investment advice.

Key Factors That Enabled Valeo Financial Advisors to Rank as a Top Indianapolis Wealth Management Firm

One Transparent Fee

Valeo believes in being completely transparent about their service fees. This fee-only Indianapolis financial advisor charges just one fee that's based on a client's net worth. Their fee covers both financial planning and investment management services.

For added transparency, Valeo makes their [fee schedule](#) readily available on their website:

- First \$6,000,000 - 0.40% of net worth
- Next \$6,000,000 - 0.20% of net worth
- Over \$12,000,000 - 0.10% of net worth



Indianapolis Top Financial Planning Firms

Comprehensive Wealth Management

You'll have a full range of wealth management services to choose from when working with this top Indianapolis financial advisor. No matter what your current or future financial needs, Valeo advisors can provide guidance for:

- Income Tax & Cash Flow: Collaborates with accountants to help clients understand how current and future decisions impact their taxes
- Risk Management: Evaluates current and future insurance needs
- Education Funding: Integrates education funding with cash flow, investment, tax, and estate planning needs
- Investments: Net-worth approach that integrates multiple areas of financial life into a long-term strategy

- **Estate Planning:** Provides estate plans that are easy to administer, tax-efficient, and in-line with individual objectives
- **Retirement:** Creates a plan that maintains a smooth transition into retirement

Rating Summary

The transparent and straight-forward approach of Valeo Financial Advisors provides clients with a foundation of trust upon which to build a successful financial advisor relationship.

With a fully integrated approach, and a fee-only fiduciary commitment to always put their clients first, Valeo Financial Advisors scores a 5-star rating as one of the best Indianapolis wealth management firms to consider partnering with this year.

Deerfield Financial Advisors, Inc. Review

Serving clients in 26 states, [Deerfield Financial Advisors, Inc.](#) provides customized financial planning services for well-established individuals, families, business owners, and entrepreneurs. They have an office in Indianapolis, IN, Chicago, IL, and Park Ridge, IL.

The firm is a [fee-only](#) Indianapolis financial advisor that works with clients typically having family incomes over \$200,000 or investment portfolios of \$1 million or more.

Key Factors That Enabled Deerfield Financial Advisors, Inc. to Rank as a Top Financial Advisor in Indianapolis

Fiduciary, Fee-Only Approach

Offering clients trust, transparency, and a commitment to put their best interests ahead of all else, Deerfield Financial Advisors does not accept outside commissions or any 3rd party incentives as a fee-only fiduciary firm.

All compensation comes directly from clients, ensuring that the firm maintains objectivity and avoids the inherent conflicts of interest of a commission-based structure.

In the financial industry, the fiduciary standard is the gold standard of trust and transparency, two key elements in any successful financial planning relationship, establishing Deerfield Financial Advisors as one of the best Indianapolis wealth management firms.

Focus on Financial Stability

At the center of their guidance, Deerfield provides a commitment to help clients maintain financial stability, even in the most volatile financial circumstances.

As such, these Indianapolis financial advisors take a personal and humanitarian approach to financial planning and investment management that's unique in this industry.

They stand ready to help clients navigate through significant life events such as:

- Marriage
- Job Changes
- Divorce
- New Children
- Economic Downturn
- College Planning
- Disability
- Unhappiness with Current Advisor
- Inheritance
- Sale of a Business
- Care of Aging Parents
- Retirement
- Loss of Desire to Self-Manage Finances
- Death of a Spouse
- New Grandchildren

Rating Summary

For those clients that appreciate a personal touch with a strong emphasis on how financial management can guide clients through uncertain life events, Deerfield is a perfect match.

However, one area we found them lacking was in the description of their services, which did not have much detail. Without more detail, potential clients may find it difficult to associate exactly how Deerfield Financial Advisors can guide them through major events like a divorce or disability.

Including more details on their process and services could definitely help the firm earn a higher rating in the future. We've rated them with 3-stars in this 2019 raking.

With a personal approach that focuses on moments, not money, Deerfield Financial Advisors remains one of the best financial advisors in Indianapolis to consider working with this year.

Related: Best Financial Advisors in Austin, TX (RIAs, Wealth Managers, Planners)

Conclusion – 2019 Best Financial Advisors in Indianapolis, Indiana

These top-rated financial advisors in Indiana have something to offer investors in every wealth bracket. From faith-based financial planning to a simplified, low-anxiety approach, one of these top firms is likely to be a great match for your own financial style.

We recommend using this listing as a base and then further narrowing down your options by looking at factors such as specialties, range of financial services, and type of clientele that an Indianapolis financial planner works with.

Once you have three to four top wealth management firms that are good contenders, it's a good idea to meet face to face to get a better feel for how their advisory style matches your personal needs and preferences.

The legwork you do up front is well worth the time when you find that perfect Indianapolis financial management firm that can help you plan for a life of successful financial decisions that lead to reaching your goals and dreams.

Rate Table Disclaimer

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

Image sources:

- <https://pixabay.com/photos/indianapolis-indiana-city-urban-1872528/>
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