
10 Best Financial Advisors & Wealth Management Firms in Wisconsin | 2019 Ranking

2019 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN WISCONSIN

Top-Rated Financial Advisors in Wisconsin for 2019

Wisconsin may be known for its great cheese and fine breweries, but it also has an excellent selection of the best financial advisors to help you build your wealth and reach your future financial goals.

Whether you want to retire early with an investment-based income to support you, or need help with finances during a life transition like divorce or inheritance, working with a professional wealth management firm in Wisconsin gives you a much better chance of meeting your objectives.

But where do you start?

Many of those that live in cities like Milwaukee, Madison, or Green Bay find so many options for Wisconsin financial advisors that they aren't quite sure where to begin. Additionally, the time involved in researching each firm can be too much to fit in between work, family, and extracurricular activities.

AdvisoryHQ has worked to make the process easier for you so you can find the best wealth management firm in Wisconsin and get started on your financial strategy for the future. We've researched multiple financial advisory firms to bring you the top 10 that the state offers.

We'll also give you some tips on what to look for in the best financial advisor so you can find one that fits your objectives, investment level, and risk tolerance level. Read on to get a serious jumpstart on a successful financial future.



Award Emblem: Best 10 Financial Advisors in Wisconsin

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

Best Financial Advisors in Wisconsin	2019 Ratings
Annex Wealth Management	5
Financial Planning & Information Services	5
Financial Service Group, Inc.	5
Hogan Financial	5
I.A.G. Wealth Partners	5
Landaas & Company	5
PJS Investment Management	5
Savant Capital Management	5
McCarthy Grittinger Financial Group	3
North Star Asset Management	3

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

Tips for Finding the Best Wisconsin Financial Advisor for Your Money

At first blush, many top financial advisors in Wisconsin will look like they offer similar investment-related services. But as you drill down with the right qualifying questions, the group will start to separate, and you'll be able to see more distinctly the differences between them.

Here are some qualifying questions you should ask when researching Wisconsin's top-rated financial planning firms in Milwaukee, Madison, Green Bay, and across the state.

Are They Fee-Only or Fee-Based?

A [fee-only](#) financial advisor does not accept any 3rd party commissions or financial incentives for selling you a particular product. This means you can be assured their advice is completely unbiased.

A [fee-based](#) Wisconsin financial advisor does accept commissions from companies that sell financial products. So, if you find a wealth manager in Wisconsin that is fee-based, look for them to also be a fiduciary, which means they have a legal obligation to be transparent and to always put their client's best interests ahead of their own.

What Asset Levels Do They Work With?

This question can help narrow down the list right away, because some Wisconsin investment management firms only work with high-net-worth clients, while others welcome all levels of investable assets.

Do They Offer Additional Services Beyond Investments?

If you're only looking for a professional investment portfolio tailored to your needs, then you may be fine with a financial advisor in Wisconsin that doesn't offer additional services.

But if you'd also like the same financial partner to handle your taxes or your company's retirement plan, then you'll want to research their services to see everything they offer.

Do They Specialize in Your Investor Type?

You may be in the "planning for retirement" investor group or a "young professional that's just starting out." Many of the top-rated Wisconsin wealth management firms specialize in specific investor groups, such as women in transition or retirees, so it's a bonus if you find an advisor that knows exactly what you're going through in life.



Top Financial Advisors in Wisconsin 2019

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 Wisconsin

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

- [Annex Wealth Management](#)
- [Financial Planning & Information Services](#)

- [Financial Service Group, Inc.](#)
- [Hogan Financial](#)
- [I.A.G. Wealth Partners](#)
- [Landaas & Company](#)
- [PJS Investment Management](#)
- [Savant Capital Management](#)
- [McCarthy Grittinger Financial Group](#)
- [North Star Asset Management](#)

Click below for previous years' rankings:

- **2018 Review:** [10 Best Financial Advisors & Wealth Management Firms in Wisconsin](#)
- **2017 Review:** [Top 10 Best Financial Advisors in Wisconsin](#)
- **2016 Review:** [Top 10 Financial Advisors in Wisconsin](#)

Annex Wealth Management Review

Finding the perfect balance between state-of-the-art technology and personal one-on-one interactions, [Annex Wealth Management](#) is a top-rated financial advisor in Wisconsin founded in 2000. They are based in Elm Grove, WI.

Although Annex is a [fee-based](#) wealth management firm, they are also a fiduciary, making a legal commitment to their clients to be transparent and always put the interests of their clients above their own.

Key Factors That Enabled Annex Wealth Management to Rank as a Top Financial Advisor in Wisconsin

Large, Experienced Team

Annex has an ever-growing team of over 60 associates, each with distinct specialties that offer a depth of experience in a number of financial areas.

These Wisconsin financial planners also come from a wide variety of backgrounds, meaning Annex has a team of professionals skilled in marketing, law, and client relations in addition to their financial expertise. Professional certifications and designations include:

- MBA
- CFP®
- CRPS®

- CDFA®
- CPA
- ChFC®
- CLU®
- CIMA®

Every client of this Wisconsin wealth management firm has access to the team's range of skillsets and years of expertise.

Wide Range of Capabilities

If you're looking for multiple financial services from your financial advisor in Wisconsin, you'll enjoy the extensive range of offerings from Annex Wealth Management.

They have financial expertise for an array of challenges, and their services include:

- Financial & Retirement Planning: Setting goals, portfolio development, continuing management, and ongoing monitoring
- Estate & Legacy Planning: Examining goals, preparing a plan for guardianship and beneficiaries, reviewing and updating over time, and more
- Investment Management: Employing a Core and Tactical Investment Strategy, best-in-class investment managers, and low portfolio costs
- Tax Preparation & Planning: Includes distribution planning, Roth conversions, tax loss harvesting, and tax gain harvesting
- Risk Management & Insurance Assessment: Researching and analyzing potential outcomes and scenarios to give you a clear picture of financial risks and solutions
- Financial Education & Discovery: Annex creates in-house educational content and leverages radio, video, and digital to share financial education resources
- 401(k) Plans for Businesses: Working beside employers to provide guidance for their employer retirement plans, they offer 3(21) or 3(38) investment advisory services

Rating Summary

As a full-service Wisconsin financial advisor, Annex Wealth Management provides clients with a solid foundation of trust and transparency, along with state-of-the-art investment management tools.

Their dedication to educating and connecting with their clients further enhances their value to investors looking for a hands-on investment team.

With a wide range of financial services, a talented team, and an independent structure, Annex Wealth Management scores a 5-star rating and is one of the best Wisconsin financial advisors to consider partnering with in 2019.

See Also: Best Financial Advisors in San Francisco, Oakland, Corte Madera, CA

Financial Planning & Information Services, Inc. Review

[Financial Planning & Information Services, Inc.](#) (FPIS) is a [fee-only](#) financial advisor in Wisconsin located just south of Green Bay, in De Pere, WI. Their mission is tied to their fiduciary pledge to always put their client's interests first and maintain high standards.

Since its inception in 1985, FPIS has made it a goal to be as involved as possible in each client's financial life and offer a full range of value-added financial services in Wisconsin.

Key Factors That Enabled Financial Planning & Information Services, Inc. to Rank as One of the Top Wisconsin Financial Advisors

Diverse Range of Services

For many clients, the best Wisconsin financial planners provide a diverse range of services, which adds to both convenience and a holistic portfolio that integrates different areas of financial life.

As a top-rated wealth management firm in Wisconsin, FPIS provides the following financial planning services:

- Retirement Analysis & Planning
- Tax Planning & Preparation
- Estate Planning & Insurance Concepts
- Education Planning
- Charitable Planning
- Investment Advice
- Asset Management

Each area of service is fully customizable to match each client's needs while also being flexible to adjust to changing life situations over time. This sets clients up for success over the duration of their financial planning relationship with FPIS.

Professional Affiliations & Designations

A helpful way for potential clients to evaluate a financial advisor in Wisconsin is to review any affiliations and designations carried by the firm. FPIS maintains membership in a variety of well-respected financial organizations, including:

- FPA—Financial Planning Association
- NAPFA—National Association of Professional Financial Advisors
- NATP—National Association of Tax Professionals
- CFP®—Certified Financial Planner™

Each of these affiliations has stringent requirements for membership, including continuing education, a demonstrated fiduciary commitment to clients, an independent structure, and more.



Wisconsin's Best Wealth Management Firms

Rating Summary

FPIS represents the gold standard in financial advisement being both fee-only and a fiduciary.

Their firm was also founded on the philosophy of serving the client first and foremost. Which means clients can trust they're receiving unbiased, transparent advice that is truly made in their best interests.

Their focus on providing a wide array of financial services and continued affiliation with top industry organizations helps to solidify a 5-star rating for Financial Planning & Information Services as one of the top financial advisors in Wisconsin to consider this year.

Financial Service Group Inc. Review

Based in the Racine area, [Financial Service Group Inc.](#) uses their technological capabilities to service clients both inside and outside of Wisconsin and takes a completely accessible approach to wealth management.

This [fee-only](#) wealth management firm in Mount Pleasant, WI has been developing strong client relationships as their first priority for over 30 years.

Key Factors That Enabled Financial Service Group Inc. to Rank as One of the Top Milwaukee Financial Advisors

Value-Based Approach

Something that makes Financial Service Group stand out among other top-rated financial advisors in Racine is their value-based approach. All financial services come from a comprehensive foundation of core values, which include:

- We do everything with heart
- We honor our commitments
- We are transparent
- We are collaborative
- We never stop learning

Instead of getting sales commissions, their income is based upon the satisfaction of their clients with whom they forge life-long relationships. They feel this relationship first approach naturally encourages more business as faithful clients often refer them to others.

Client-Centric Process

FSG makes the financial planning process easy and also keeps it centered around the client. As a top Wisconsin financial advisor, Financial Service Group implements the following comprehensive steps to build and maintain relationships with clients:

The Beginning - Getting the Relationship Started

- Finding your fit
- Discovery & goal setting
- Alignment meetings

- Implementation

The Middle - Living Your Great Life

- Review meetings
- Tax advice & preparation
- Investment management
- As needed meetings
- Referral partners

The End - When It's Time to Part Ways

- End of the relationship
- Death
- Estate distribution to heirs
- Financial decisions of your heirs

Rating Summary

Clients who enjoy accessibility and attention put on building a long-term relationship will appreciate the approach to financial planning by Financial Service Group. Their wholly client-centric philosophy to financial services lays the foundation for trust and transparency.

Providing a wide array of services and focusing on a life-long commitment to clients, helps to solidify Financial Service Group's 5-star rating as one of the top Wisconsin financial advisors to consider partnering with this year.

Related: Top Financial Advisors in San Diego, California

Hogan Financial Review

From brainstorming to communicating, [Hogan Financial](#) works to help their clients navigate both the expected and unexpected with their financial future fully intact and healthy.

Founded in 1992, they are a [fee-only](#) financial advisor in Milwaukee, WI that also makes a fiduciary commitment to act in the best interest of their clients at all times and serve them with completely unbiased advice.

Key Factors That Enabled Hogan Financial to Rank as One of the Top Milwaukee Financial Advisors

Financial Planning for Life Transitions

As a top financial advisor in Milwaukee, Hogan Financial applies a unique approach to helping clients navigate through various life transitions and while growing and protecting their wealth. These life transitions include:

- Setting Your Course: Geared towards young professionals, services from this top Wisconsin financial advisor can help foster good financial habits early on, like building cash reserves and creating a stable investment foundation.
- Expect the Unexpected: Financial stability is crucial when weathering the storms that life may bring, which could mean a change in health, adopting a new career, purchasing a home, or simply streamlining daily cash flow.
- Work and Life: Balancing work and life well often reflects financial values and may include saving, long-term investing, tailoring income and estate tax planning, and more.
- Retirement: This is a period of growth and transition, and these Milwaukee financial advisors can help you set up daily cash flow, craft a smart retirement plan, look at estate tax planning, and more.
- Old Age Knocks at the Door: In retirement, financial concerns revolve around automating your daily financial life, sharing necessary financial information with loved ones, and even choosing a suitable retirement facility.



The Best Financial Planners in Milwaukee, WI

Focus on Partnership & Transparency

Hogan Financial is dedicated to developing and maintaining positive client relationships. As a fee-only firm with a fiduciary commitment, this Wisconsin wealth management firm demonstrates a high level of transparency, supporting trust between each client and their advisor.

Additionally, Hogan creates a collaborative atmosphere, working side-by-side with their clients to craft successful financial plans for life that are adjusted fluidly as life situations evolve.

These Milwaukee financial advisors are dedicated to:

- Understanding your values and goals
- Providing assistance with family financial conversations and education
- Integrating career and financial planning
- Providing helpful and trusted assistance during transitions
- Acting as a foundation and guide during unpredictable life events
- Providing access to expert, personal advice
- Offering advisors you can brainstorm with that understand you, your situation, and your concerns

Rating Summary

For clients that are looking for a truly personalized, in-depth, boutique financial planning experience, Hogan Financial is an excellent Milwaukee financial advisor to consider.

While the firm may be one of the smaller ones on our list, their size and relationship-based focus offer clients the benefit of one-on-one attention and care.

With highly-qualified advisors, a focus on building long-term relationships, and a unique, down-to-earth approachability, Hogan Financial earns a 5-star rating as one of the best financial advisors in Wisconsin to consider partnering with in 2019.

Popular Article: Best Financial Advisors in Charlotte, North Carolina

I.A.G. Wealth Partners Review

[IAG Wealth Partners](#) was founded in 1985 to help their clients make sound financial decisions so they can fulfill their passions and pursue their dreams. This Wisconsin wealth management firm has offices in Waukesha and Janesville.

This is a fee-only investment management firm as stated on their [ADV](#), however, they do also state that their staff also serve as Registered Representatives of LPL, an independent broker-dealer, and may receive commissions for certain LPL transactions.

We always recommend you clarify fee structure with any financial advisor before hiring them.

Key Factors That Enabled IAG Wealth Partners to Rank as a Top Financial Advisor in Wisconsin

Customized Portfolio GPS™

To better serve clients and address various goals, incomes, and risk tolerances, IAG uses Portfolio GPS™, a proprietary tool that allows your Wisconsin financial advisor to align your investment risk with goals and time horizon.

In addition to Portfolio GPS™, IAG also has an Investment Committee that meets quarterly, ensuring your portfolio and target allocation and monitored and periodic changes made as needed.

Portfolio GPS™ entails the following processes:

- Establish: Determine short and long-term goals and portfolio goals and risk guidelines
- Analyze: Analyze current investment portfolio, develop a strategic and tactical asset allocation strategy
- Construct: Craft a successful portfolio based upon cash flow needs, tax efficiency, financial plan
- Manage: Evaluate progress of portfolio, recommend adjustments, and conduct real-time monitoring of "Green Zone" progress

Holistic Wealth Management

One of the founding principles of IAG is a holistic approach that integrates every facet of a client's financial life into comprehensive and successful wealth strategies. This allows clients to have a "one stop shop" when it comes to their financial services.

The wealth strategies of this top Wisconsin financial advisor are separated into eight categories of diverse and connected services, including:

- Financial Snapshot
- Retirement Planning
- Tax Planning
- Investment Planning

- Insurance & Liability Management
- Estate & Legacy Planning
- Business Succession Planning
- Executive Compensation Management

Rating Summary

With over 200 years of combined wealth management and financial planning experience, IAG Wealth Partners has a rich depth of expertise and knowledge to offer clients looking for expert financial advisory services in Wisconsin.

They are also unique in that they take a faith-based approach to financial planning, and from that foundation, strive to help clients fulfill their purpose.

With a fiduciary commitment, and a team of fun and caring professionals offering top quality financial services, IAG Wealth Partners earns a 5-star rating as a top financial advisor in Wisconsin to consider working with in 2019.

Read More: Top Financial Advisors in Philadelphia, PA

Landaas & Company Review

Dedicated to serving the needs and objectives of individual investors, [Landaas & Company](#) is based in Milwaukee, Wisconsin and provides financial advisory services to thousands of clients.

Although Landaas & Company is a [fee-based](#) financial advisor in Milwaukee, they are independent and a fiduciary, which provides trust for clients that they are acting in their best interest at all times.

Key Factors That Enabled Landaas & Company to Rank as a Top Financial Advisor in Milwaukee

Broad Range of Services

You'll have plenty of service options when working with these Milwaukee, WI financial advisors. While Landaas & Company largely focuses on portfolio construction and management, they're also well-equipped to handle a variety of additional financial areas, including:

- **Retirement Planning:** Help clients establish retirement income requirements, understand retirement plans and alternative savings options, and more

- Education Planning: Create strategies to meet the costs of high education without sacrificing other long-term wealth planning goals
- Estate Planning: Provide adequate financial security for loved ones, keeping liquid assets in estate, transferring the maximum percentage of assets, and more
- Long-Term Care: Protect retirement assets to ensure that long-term care doesn't unnecessarily burden other financial goals and dreams
- Pension Planning: Assist business owners with SEP, SIMPLEs, profit sharing plans, IRAs, 401ks, and more
- Succession Planning: Work with professionals to ensure smooth business transfers, including buy-sell agreements, use of life insurance, family limited partnerships, and more

Educational Resources

Few firms invest as much effort in client education as Landaas & Company. Their Money Talk page includes a wealth of public education and outreach initiated by Bob Landaas, the president of the company.

In addition to a weekly Money Talk podcast, this top financial advisor in Milwaukee offers financial education videos, financial tools, and Landaas University, which includes links to multiple investor education resources.

Regular features from the firm's educational archives include:

- Ask Money Talk: Questions from podcast listeners are answered by investment professionals
- Bob's View: Monthly financial perspectives from founder Bob Landaas
- Talking Money: Explanation of common financial terms and concepts to foster financial literacy
- What We're Reading: Samples of what the financial planners in Milwaukee at Landaas & Company are interested in



Top-Rated Wisconsin Financial Advisory Firms 2019

Rating Summary

If you're looking for an experienced and full-service Wisconsin financial advisory firm, then Landaas & Company will be an excellent option for you. Their depth of knowledge and expertise is on display in their treasure trove of educational resources.

Their independent status and fiduciary duty as a fee-based Milwaukee financial advisor ensure that their financial guidance is unbiased and in the best interests of their client.

Their wide range of services, a focus of financial literacy, and commitment to making their clients a priority, solidify a 5-star rating for Landaas & Company as one of the best financial advisors in Wisconsin to consider working with in 2019.

Related: Best Financial Advisors in Omaha, Nebraska

PJS Investment Management Review

With a focus on simplicity and transparency, [PJS Investment Management](#) is a Cedarburg wealth management firm with a mission to help clients feel at ease and confident about their financial future.

The firm is a [fee-only](#) financial advisor in Wisconsin that features a disciplined approach to helping clients meet current and future cash flow needs and keeping clients continually updated about their portfolio's progress.

Key Factors That Enabled PJS Investment Management to Rank as a Top Wisconsin Financial Advisor

Large Offering of Services

Something that makes PJS Investment Management a standout among top Wisconsin financial advisors is the firm's commitment to clear and streamlined processes for each branch of service.

Not only does this make it easier for potential clients to evaluate the firm and their offerings, but it also demonstrates their commitment to transparency, an important aspect of any successful Wisconsin wealth management relationship.

Their wide range of services include:

- [Investment Management](#): Discuss expectations, develop individualized recommendations, create a tailored portfolio, and more
- [Saving and Spending Analysis](#): Analyze the major levers in saving and spending, present and future, and monitor them over time
- [Taxes](#): Review tax returns, refer to any changes in tax laws, track cost basis, deliver annual summaries, and work alongside tax professionals
- [Debt Management](#): Managing debt such as mortgages and other areas of household debt
- [Insurance Assessment](#): Review current coverage and refer to an insurance professional to address any potential weak spots
- [Life Transition Assistance](#): Help adjust your financial plan for things like divorce, selling a business, receiving an inheritance, and other life transitions

- Education Planning: Planning and saving for major educational expenses in the future

Clear Investment Strategy

The primary emphasis of PJS Investment Management's investment process is minimizing risk through diversification. This team of Wisconsin financial advisors follows a clear strategy based on time-tested principles.

They look at specific information when making stock selections, including:

- Leading market positions for its products and services
- Strong management team with a clear vision and strategic plan for the future
- Solid financial position with satisfactory liquidity reserves
- Essential services or products whose demand continues even in slow-growth economic times
- International opportunities in countries with a steady political environment and promising growth prospects
- Attractive dividend yield and possibilities for continued dividend growth

Rating Summary

For an all-encompassing approach that looks beyond common investment vehicles to give their clients the best chance for long-term growth, PJS Investment Management is an excellent choice. This Wisconsin financial advisor provides its clients with well-strategized, independent services, and transparent pricing.

The firm also provides a comprehensive range of financial services and an in-depth look at their investment philosophy. These factors and more earn PJS Investment Management a 5-star rating as one of the best financial advisors in Wisconsin to consider this year.

Savant Capital Management Review

[Savant Capital Management](#) has been providing integrated investment management and financial planning solutions in Wisconsin for over 30 years. They have two offices in the state, in Madison and Park Falls, and 13 other offices in Illinois, Virginia, and New Mexico

As a [fee-only](#) financial planner in Madison, WI, Savant aims to help clients maximize their investments while protecting themselves and their assets. They make a fiduciary commitment to their clients, who reside within all 50 states and abroad.

Key Factors That Enabled Savant Capital Management to Rank as a Top Financial Advisor in Madison, WI

Assessment-Based Approach

As one of the top-rated financial planners in Madison, WI, Savant Capital isn't just focused on portfolio growth, but also on helping you be ready for any of life's unpredictable events.

To this end, Savant asks you to complete their handy Ideal Futures Financial Health AssessmentSM which gives them a better idea of where you are in life and how to help you move forward.

This proprietary process developed by these financial planners in Madison, WI covers 10 key planning areas that all integrate to form your ideal future:

- Vision & Goals
- Retirement Planning
- Risk Management & Asset Protection
- Debt Management
- Education Planning
- Income Tax Planning
- Investment Planning
- Estate Planning & Administration
- Business Planning & Succession
- Charitable Planning



Top Financial Planning Firms in Madison, WI

Targeted Audience

Savant Capital Management serves high-net-worth individuals who want to preserve their hard-earned capital and pursue continuous and smart growth.

The international expertise of these top-rated Madison, Wisconsin wealth managers provides a level of sophistication to their portfolios that not all financial advisors can match.

To form a client relationship with Savant, you'll typically need to meet one of the following criteria:

- Have an investment portfolio of at least \$500,000 within the next 12 months
- Expecting a portfolio of \$1,000,000 by the end of 5 years
- Be an immediate family member of an existing Savant client with a portfolio of more than \$5,000,000
- Pay a \$5,000 minimum annual fee to cover investment management services

Rating Summary

For high-net-worth individuals, Savant Capital Management offers the expertise to deal with the sophisticated finances of more affluent clients. Their fee-only structure is also an asset that assures all advice given will be completely free of any conflicts of interest.

With a low-cost approach, individualized attention, and a transparent compensation structure, Savant Capital Management earns a 5-star rating as a top financial advisor in Madison, WI to consider partnering with this year.

McCarthy Grittinger Financial Group LLC Review

Taking a highly personal approach to wealth management, [McCarthy Grittinger Financial Group LLC](#) has grown since its founding in 1995 to become one of the top financial advisors in Milwaukee and southeastern Wisconsin.

This Wisconsin financial advisory firm is [fee-only](#) and also makes a fiduciary commitment to their clients to always serve their best interests. They provide expert independent financial planning services for a variety of individuals and families.

Key Factors That Enabled McCarthy Grittinger Financial Group LLC to Rank as a Top Financial Advisor in Milwaukee, Wisconsin

Focused Investment Expertise

As one of the best Milwaukee financial advisors, McCarthy Grittinger is laser-focused on offering core financial services in two key areas. Each of them incorporates a variety of things that are crucial to an integrated portfolio strategy:

- Advanced Planning: Your financial advisor works to discover and define a client's financial goals and develop a plan to meet them. They consider areas such as education, insurance, taxes, and estate planning.
- Investment Management: Integrated financial planning and investment management that tailors portfolios to each client's distinct needs and current financial situation.

No matter what area of service a client falls into, these Milwaukee financial advisors apply a holistic approach to investment management, taking into account other areas of finances beyond investments to provide a truly comprehensive experience.



Wisconsin's Top Financial Planning Firms

Focus on Trust & Transparency

As one of the best financial advisors in Milwaukee, McCarthy Grittinger values building long-term personal relationships with its clients.

The firm emphasizes its belief in integrity as well as the importance it places on its fiduciary responsibilities to provide a foundation of trust and transparency to each client-advisor relationship.

The fee-only status of the firm helps support their firm's commitment to honesty between clients and their Milwaukee financial advisors, supporting positive long-term relationships and personalized financial planning experience.

Rating Summary

McCarthy Grittinger Financial Group's team of professionally credentialed advisors include Certified Financial Planning™ credentials as well as a CPA. This means clients can enjoy expert investment management services as well as tax and retirement planning.

While the firm offers key financial services, they don't go into detail about them. So, it may be difficult for potential clients to fully evaluate the firm without fuller descriptions of what their services entail, which is why we've scored them with a 3-star rating.

However, with more detailed information, McCarthy Grittinger could easily improve both their value proposition to new clients and their rating. Their client dedication and expertise make them a top advisor in Milwaukee, Wisconsin to consider working with this year.

Don't Miss: Top Financial Advisors in Indianapolis, Indiana

North Star Asset Management, Inc. Review

Founded in 1996, [North Star Asset Management, Inc.](#) provides objective and skilled financial advisory services in Menasha, Wisconsin. They operate on a high level of integrity and respect and have over 200 years of combined experience.

This [fee-only](#) Wisconsin wealth management firm makes a fiduciary commitment to its clients to put their interests first and enjoys serving private individuals, institutions, corporations, and foundations.

Key Factors That Enabled North Star Asset Management, Inc. to Rank as a Top Financial Advisor in Wisconsin

Experienced Team

North Star is Wisconsin's second largest independent SEC Registered Investment Advisory firm and they're backed by a team of well-credentialed professionals.

Clients of this top-rated wealth management firm in Wisconsin can benefit from the wide range of professional experience and core industry accreditations of its team, including:

- CFA®
- CFP®
- CPA
- IACCP®

By combining a talented team with these core credentials, North Star is well-prepared to assist clients with a wide range of investment challenges, supporting a dynamic, long-term relationship.

Flexible Investment Management

This Wisconsin wealth management firm builds customized portfolios that are designed to fit each client's circumstances, objectives, and risk tolerance, making North Star one of the most adaptable firms on this list.

By using individual securities, North Star can offer clients greater flexibility and control, optimizing their tax situations and return requirements. Add-on services are also available, such as retirement cash flow projections.

Additionally, this Wisconsin financial advisor offers administrative services, including:

- Charitable gift transfers
- Bill payments
- Record keeping
- Tax reporting

Rating Summary

With over \$1.5 billion in assets under management and 11 experienced investment professionals, North Star Asset Management makes a great choice for clients that want their finances in capable, experienced hands.

However, prospective clients may find it difficult to evaluate the firm without a clear, detailed listing of what each service entails. Which is why we've scored North Star with a 3-star rating. They could easily improve this by adding more detail about their process and services.

With investment management and 401k services provided with a fee-only and fiduciary commitment, North Star Asset Management is one of the best financial advisors in Wisconsin to consider partnering with in 2019.

Popular Article: Top Financial Advisors in Chicago, Illinois (Ranking)

Conclusion – 2019 Top 10 Financial Advisors in Wisconsin

These top financial advisors in Milwaukee, Madison, Waukesha, Cedarburg, and other areas of Wisconsin, offer investors many great choices for expert financial guidance to help them reach their goals in life.

Our advice is to further narrow down this list to 3 to 5 firms by looking at the differentiating factors, such as the wealth level these Wisconsin financial planners work with, specialties they offer, and investment approach.

The next step is to set up an introductory meeting with each firm of interest to get a better feel for them and see how they are to work with face-to-face. Go prepared with any questions you have and also with a list of your assets, liabilities, and financial objectives.

The good news is that once you've found your financial advisory partner, you can begin to pave a path for a strong financial future and one that helps you fulfill your dreams.

Rate Table Disclaimer

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

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