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# **10 Best Financial Advisors in Oklahoma City & Tulsa, OK | 2019 Ranking**

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## **2019 RANKING & REVIEWS BEST TULSA & OKLAHOMA CITY FINANCIAL ADVISORS**

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### **Ranking: Top 10 Financial Advisors in Oklahoma City & Tulsa, OK**

Oklahoma City and Tulsa are the two largest cities in Oklahoma, and while they may not garner the same “big city” recognition as a Chicago or Atlanta, they offer the same high-quality financial advisors and wealth managers.

No matter where you reside, it’s likely you’ll have similar financial challenges, hopes, and goals for the future, such as building your nest egg, planning for retirement, or funding a child’s education. Financial planners can help chart a sound financial path.

When looking for the best Tulsa and Oklahoma City financial advisors, it can seem like a daunting task. There’s time spent searching out the firms in your area, looking up reviews, and then reviewing their websites to see what type of services they offer.

Many people find this takes a lot of time, the time they don’t have. So, they end up putting off their search for an expert Oklahoma City or Tulsa wealth management firm for years... all the while their finances aren’t getting the care they could benefit from.

AdvisoryHQ strives to make that task easier for you by doing the initial research and ranking for you. We review hundreds of firms each year in a variety of cities across the U.S. and U.K. to create our ratings of the best financial advisory firms to work with.

In this guide, we’ve listed the top-rated Oklahoma City and Tulsa, OK financial advisory firms to give you a head start in selecting someone you can trust with your financial planning and investment management.

We’ve reviewed fee structure, types of services they offer, any specialties they have, along with the experience of their team. The firms on this list represent the best wealth management firms that Tulsa and Oklahoma City have to offer.



*Award Emblem: Top 10 Best Financial Advisors in Oklahoma City & Tulsa, Oklahoma*

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## **Top 10 Financial Advisors in Tulsa & Oklahoma City | Brief Comparison & Ranking**

<b>Wealth Management Firms in Oklahoma City &amp; Tulsa</b>	<b>2019 Ratings</b>
Align Wealth Management	5
Cadent Capital Advisors, LLC	5
ChartMark Investments, Inc.	5
Exencial Wealth Advisors	5
Hughes Warren, Inc.	5
Retirement Investment Advisors, Inc.	5
The Legacy Financial Group, Inc.	5
Warburton Capital Management	5
InvesTrust Wealth Management	3
Native American Fund Advisors (NAFA)	3

*Table: Top 10 Best Financial Advisors in OKC & Tulsa | Above list is sorted by rating*

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## How to Find the Best Financial Advisors in Oklahoma City and Tulsa

What are some of the things to look for in a financial advisor? If you don't know which attributes differentiate Oklahoma City and Tulsa financial planning firms, they can all look the same at first glance.

We've included some of those attributes below that will help you better select the financial firm that is the best one to meet your distinct needs.

Ask these questions when looking for an Oklahoma financial advisor:

### **Do they have a minimum investment limit?**

Some wealth management firms in Oklahoma City or Tulsa may require a minimum investible asset level, while others work with investors of all wealth ranges. This is one of the first differentiating factors you'll want to look for.

### **Are they fee-only or fee-based?**

Fee structure is important when working with Oklahoma financial management firms. [Fee-only](#) firms do not accept any outside commissions from sales of financial products, so you know their advice is completely unbiased.

[Fee-based](#) financial advisors in Tulsa or OK City are free to accept commissions in addition to client fees as a form of compensation. This can create a natural conflict of interest, which is why you want to look for a fiduciary commitment if a firm is fee-based, which is a legal obligation to put your best interests first.

### **Do their main services match my need?**

If your main goal is to save for early retirement, you'll want a firm that focuses heavily on retirement planning. If you're a business owner or executive, then you'll be looking for a firm that specializes in working with clients with similar financial needs.

### **Does their approach match my personality?**

Some investors prefer a "suit and tie" atmosphere that's a bit more formal, while others would rather work with a financial advisor that is more laid-back. An initial consultation will help you see if an Oklahoma investment firm's personality matches your own.



*Best Oklahoma City & Tulsa Financial Advisors 2019*

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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 Oklahoma City and Tulsa**

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

- [Align Wealth Management](#)

- [Cadent Capital Advisors, LLC](#)
- [ChartMark Investments, Inc.](#)
- [Exencial Wealth Advisors](#)
- [Hughes Warren, Inc.](#)
- [Retirement Investment Advisors, Inc.](#)
- [The Legacy Financial Group, Inc.](#)
- [Warburton Capital Management](#)
- [InvesTrust Wealth Management](#)
- [Native American Fund Advisors \(NAFA\)](#)

Click below for previous years' rankings:

- **2018 Review:** [Top 10 Best Financial Advisors in Oklahoma City & Tulsa, OK](#)
- **2017 Review:** [Top 10 Best Wealth Management Firms in Oklahoma City](#)
- **2016 Review:** [Top 8 Best Financial Advisors in Oklahoma City](#)

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## Align Wealth Management Review

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[Align Wealth](#) is an independent financial advisor in Oklahoma City that takes an extremely client-focused approach. It is one of the few wealth management firms we've seen that offers a money-back guarantee if you're not happy within the first year.

The firm is a [fee-only](#) Oklahoma financial planner that has offices in both Oklahoma City and St. Petersburg, FL and works with a discerning group of individuals, families, and small business owners.

### **Key Factors That Enabled Align Wealth Management to Rank as a Top Wealth Management Firm in Oklahoma City and Tulsa**

#### **Transparency**

One thing that makes Align stand out on our list of top Oklahoma City wealth management firms is that it hires a third-party reconciliation firm, Tamarac (a division of Envestnet) to track and verify the firm's investment track record.

This allows the Oklahoma City investment managers at Align to provide documentation on how the firm performed at any given point in time, replete with an array of market conditions.

Align also is completely transparent about their fees, listing them on their site, and offering your money back if you're not happy with their performance within a year. All these factors provide a system of checks and balances to offer clients peace of mind.

## **Total Team Approach**

At Align, you won't have just one financial advisor working on your account. Instead, this entire team of financial planners in Oklahoma City will work together to review your portfolio and offer their expertise on how to maximize your investments.

This guarantees a more robust plan than you'll receive from a typical Oklahoma City wealth management firm.

To further ensure that you receive the highest quality investment advice, Align goes the extra mile by partnering with Forum Financial Management and Dimensional Fund Advisors.

### Forum Financial Management

Forum is an independent, registered advisory firm comprised of 30 investment pros, including CPAs, CFPs, and attorneys.

Through this strategic partnership, Align has the ability to provide more integrated solutions that best address your financial needs and goals.

### Dimensional Fund Advisors

By working with Dimensional Fund Advisors, Align connects with Nobel laureates and distinguished professors in economic and portfolio theory.

This partnership puts Align on the front lines of economic and financial services innovation. It constantly receives the benefit of the research conducted by DFA's board, which allows Align's financial advisors to implement stronger portfolios.

## **Rating Summary**

This Oklahoma financial advisory firm offers innovative financial services that are grounded in best practices and academic research. An additional benefit they offer clients is a complimentary and confidential Second Opinion Service to review your current financial plan and provide their insights.

With a fee-only structure, a fiduciary commitment, and more transparency than you'll find at some other firms, Align Wealth Management earns a 5-star rating as one of the best Oklahoma City financial advisors to consider partnering with in 2019.

***See Also: Top Financial Advisors and Best Wealth Managers in the US & UK | Top Ranking Lists***

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## Cadent Capital Advisors, LLC Review

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With a value-focused approach, [Cadent Capital Advisors, LLC](#) offers holistic wealth management services from locations in Tulsa and Oklahoma City, OK.

The firm is a [fee-based](#) financial advisor in OKC and Tulsa that makes a fiduciary commitment to each client to put their needs first and to provide completely transparent advice.

Although Cadent Capital is a fee-based Tulsa financial planning firm, we have included them for their commitment to independence, expert team, and a broad array of financial services.

### **Key Factors That Enabled Cadent Capital Advisors, LLC to Rank as a Best Financial Advisor in Tulsa and Oklahoma City**

#### **Experienced Financial Team**

When you work with Cadent Capital, you get the benefit of a team that has over 100 years of combined experience in the financial industry. These Tulsa and Oklahoma City financial advisors offer a well-defined process and client-centric vision.

Along with various investment securities licenses, the financial advisors at Cadent Capital carry the following designations:

- CFP®—Certified Financial Planner
- AIF®—Accredited Investment Fiduciary
- SPHR®—Senior Professional in Human Resources
- CRPC®—Chartered Retirement Planning Counselor
- ChFC®—Chartered Financial Consultant

Not only do these designations include several areas of financial expertise, they also incorporate continuing education and keep advisors up-to-date on business and financial industry changes.





### *Top-Rated Wealth Management Firms in Tulsa & OKC*

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

For many clients, finding the best Oklahoma City or Tulsa financial advisor means finding a firm that can offer multiple services that you'll need as you transition through the various stages of life.

Financial goals and needs are subject to change from one year to the next, and Cadent Capital had the deep bench to handle these fluctuations through a wide range of financial services:

- **Investment Management**: Strategic asset allocation, continuous portfolio monitoring, multigenerational wealth, education planning, and more
- **Financial Planning & Cash Flow Management**: Retirement planning, cash flow analysis, asset integration, employer benefits plans, and more
- **Risk Management**: Asset protection strategies and insurance needs analysis
- **Tax Planning**: Active and continuous tax management, minimization, and cost basis tracking
- **Legacy and Estate Planning**: Tax mitigation strategies, estate and trust document review, coordination with estate attorneys, and more

#### **Rating Summary**

Cadent Capital Advisors demonstrates a strong commitment to the protection and growth of their clients' wealth. They are an independent, boutique financial advisory firm that focuses on what you value rather than what you're worth.



With an experienced team and a robust offering of financial services, Cadent Capital solidifies their 5-star rating as one of the best financial advisors in OKC and Tulsa to consider partnering with this year.

***Don't Miss: Best Financial Advisors in D.C., Maryland, and Virginia (Tri-State)***

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## **ChartMark Investments, Inc. Review**

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[ChartMark Investments, Inc.](#) is dedicated to helping clients reach their goals to provide a life with real financial security. This Oklahoma financial advisory firm serves individuals, small businesses, and institutions from their Tulsa location.

The firm is an independent, [fee-only](#) financial planner that employs solid investment principals and brings a strong work ethic and professional attitude to everything they take on.

### **Key Factors That Enabled ChartMark Investments, Inc. to Rank as a Top Financial Advisor in Tulsa**

#### **Focus on Your Long-Term Well-Being**

ChartMark believes in building long-term relationships over time and being there for you through every phase of life. This expert team of top advisors assume your goals, needs, and success as their own.

These expert advisors individually walk you through the financial planning and investment process. They bring further value to the client-advisor relationship through quality customer service and ensuring that you speak to a real person any time you call with a question or concern.

#### **Core Financial Services**

ChartMark offers the core financial services most clients expect, and they're all focused on helping their clients reach their goals and integrate a robust financial strategy into their lives.

This Tulsa wealth management firm offers the following core financial services:

- **Investment Management**: Aligns short-term and long-term life goals with investment strategies to reach them

- Financial Planning: A written plan with targets and benchmarks offered in a choice of either in-depth analysis or a quick overview of your current financial position
- Portfolio Management: Strategies are selected, implemented, and monitored daily
- Qualified Retirement Plan Solution: Comprehensive plan management system including everything from recordkeeping to monitoring of performance

## **Rating Summary**

ChartMark's independent, fee-only, fiduciary status means that clients can have peace of mind that these Tulsa financial advisors are working only in their best interest. They do not receive any commissions from sales of financial products and operate with transparency.

With strong core financial services and a passion for seeing their clients succeed in the short and long-term, ChartMark scores a 5-star rating as one of the best financial advisors in Tulsa to consider partnering with this year.

***Related: Top Financial Advisors in Iowa (Des Moines, Ames, Dubuque, and Davenport)***

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## **Exencial Wealth Advisors Reviews**

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Connecting clients' life and occupational goals with their money is something [Exencial Wealth Advisors](#) does with pride. This financial advisory firm is located in Oklahoma City, OK and also has offices in Frisco and San Antonio, TX, and Old Lyme, CT.

The firm is an independent, [fee-only](#) wealth manager in OKC that works with individuals, families, corporate executives, institutions, and business owners throughout the U.S.

### **Key Factors That Enabled Exencial Wealth Advisors to Rank as a Top Financial Advisor in OKC and Tulsa**

#### **Exencial's E3 Process**

For clients that prefer the strength of an integrated approach, they'll appreciate the "integrated beats fragmented" philosophy of this Oklahoma City financial advisory firm.

Their E3 process was developed with integration in mind and represents the mission to evaluate, execute, and evolve during the investment management process.

Here is a closer look at Exencial's E3 financial advisory process:

- Evaluate: In this initial step, these OKC financial planners gain a complete understanding of each client's personal financial situation and objectives for the future.
- Execute: The most complex of the three, Exencial advisors craft their client's financial strategies using a completely holistic approach that incorporates tax and estate planning teams.
- Evolve: Life often brings unexpected changes and these financial advisors in Oklahoma City believe in getting ahead of any major changes proactively to ensure your strategy is always evolving to match your life situation and future goals.

## **Financial Education Resources**

Going the extra mile to ensure their clients have the support they need in financial literacy, Exencial offers both videos and articles on their website to help clients and non-clients alike learn more about the factors that can impact their finances and life.

Some of the helpful topics offered by this OKC wealth management firm include:

- "A Closer Look at Three Market Risks"
- "Considerations for Including Rental Real Estate in Your Investment Plan"
- "International Investing"
- "2018 Review and 2019 Market Outlook"

By offering investor education resources, Exencial illustrates their commitment to not only providing financial services, but to also helping clients understand the intricacies of investing and wealth management so they can make more informed decisions in the future.



*Best Financial Planning Firms in Oklahoma City & Tulsa 2019*

**Rating Summary**

Exencial's integrated and holistic approach to wealth management ensures clients have portfolios that are tax efficient and are designed to evolve along with their lives. Their fee-only structure gives clients peace of mind that they're receiving conflict-free advice.

With a flexible and proactive strategy and comprehensive process that's focused on client success, Exencial Wealth Advisors solidifies their 5-star rating and is one of the best financial planners in OKC to consider partnering with this year.

***Popular Article: Top Financial Advisors in Wisconsin (Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon)***

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## Hughes Warren Inc. Review

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For over a decade, [Hughes Warren Inc.](#) has been providing personalized attention to the financial management needs of individuals, families, and small businesses. The firm is based in Oklahoma City, Oklahoma.

As a [fee-only](#) financial planner in OKC, the firm's advisors are committed to serving their clients and do not accept any 3<sup>rd</sup> party commissions, ensuring their guidance is completely unbiased.

### **Key Factors That Enabled Hughes Warren Inc. to Rank as a Top Wealth Management Firm in Oklahoma City**

#### **Puts Your Best Interests First**

Hughes Warren takes a client-focused approach and one founded in integrity and trust. Their core tenants of client service include:

- Fee-Only: The firm does not sell products or earn commissions, which allows them to provide conflict-free advice
- Independence: As an independent fiduciary, this Oklahoma City financial planning firm is fully committed to ensuring that their clients succeed
- Integrity: Each team member at Hughes Warren is held to the highest ethical and moral standards
- Service: The firm is committed to giving clients superior investment opportunities and getting to know their clients on both personal and financial levels

#### **Custom Investment Plans**

You won't get a "cookie-cutter" approach to investing at Hughes Warren. This OKC investment management firm meets with you one-on-one to review your financial health and understand your future goals so they can craft a personalized strategy just for you.

Next, your Oklahoma City financial advisor makes recommendations customized to your individual goals. Several factors contribute to these recommendations, including your cash flow, taxes, risk tolerance, and existing investments.

Hughes Warren advisors emphasize diversification with a preference for no-load and load-waived mutual funds to make portfolios as efficient as possible.

Once your customized plan is implemented, your Hughes Warren financial advisor in OKC continually monitors your portfolio performance, rebalancing it as needed, and provides you with regular updates.

### **Rating Summary**

Hughes Warren Inc. offers the close-knit feel and personalized approach that comes from working with a smaller Tulsa and Oklahoma City financial advisor. Their attention to detail and client-centric philosophy also provide excellent value.

With a fee-only structure, fiduciary commitment, and over 40 years of combined experience in financial management and estate planning, Hughes Warren scores 5-stars as one of the best financial advisors in OKC to consider partnering with in 2019.

***Read More: Top Financial Advisors in San Antonio and New Braunfels, Texas***

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## **Retirement Investment Advisors, Inc. Review**

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Founded in 1990, [Retirement Investment Advisors, Inc.](#) specializes in providing expert guidance when it comes to one of the most important aspects of a person's financial life... their retirement.

The firm is a [fee-only](#) Oklahoma City financial advisor with two additional offices in Edmond, OK, and Frisco, TX.

**Key Factors That Enabled Retirement Investment Advisors, Inc. to Rank as a Top Financial Advisor in OKC**

### **Mapping Out Your Retirement Path**

Retirement Investment Advisors takes a comprehensive approach to help clients map out a comfortable retirement, which begins with a series of questions that help inform an investment strategy to meet your unique, individual goals.

Discussed in detail within their free brochure "[The Retirement Path,](#)" the seven questions they pose are:

- How many months are you starting with?

- How long do you want your money to last?
- How much do you want to end up with?
- How much return will you get on your investments?
- How much risk should you take?
- What about inflation?
- How much do you want to take out each year?

Once you complete a complimentary consultation with your OKC financial advisor, you will receive a customized strategy based upon your needs. Upon approving your plan, your financial advisor in Oklahoma City begins implementation of your strategy while working with you regularly to review and adjust it as needed.



*Oklahoma City's Top Financial Advisors*

### **Highly Talented Team**

The Oklahoma City financial planners at Retirement Investment Advisors have completed training in several disciplines to help them stay at the top of their game. These designations require continuing education and keep advisors up-to-date on industry changes.

These designations include:

- Certified Financial Planner™ (CFP®)
- Certified Public Accountant (CPA)
- Personal Financial Specialist (PFS)



- Accredited Investment Fiduciary™ (AIF®)
- Certified Divorce Financial Analyst™ (CDFA™)

## **Rating Summary**

As an independent fiduciary, Retirement Investment Advisors provides unbiased financial guidance made with their clients' best interests in mind.

The firm also maintains a commitment to ongoing education, both for their staff and their clients, providing a broad range of educational resources and tools on their website.

With a laser focus on helping clients retire successfully and the experience and expertise that comes from years of specialized work, Retirement Investment Advisors earns a 5-star rating as one of the best OKC financial advisors to consider partnering with this year.

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

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## **The Legacy Financial Group, Inc. Review**

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Serving the residents of Tulsa and the surrounding area for nearly two decades, [The Legacy Financial Group, Inc.](#) has a passion for helping people achieve financial confidence and live abundant lives.

The firm is a [fee-only](#) financial advisor in Tulsa serving individuals, 401k plans, trust, foundations, and businesses from three offices in the city.

### **Key Factors That Enabled The Legacy Financial Group, Inc. to Rank as a Top Financial Advisor in Tulsa**

#### **Comprehensive Retirement Planning**

Planning for retirement is one of the key reasons people seek out help to manage their finances for the future. This Tulsa wealth management firm offers straight-forward retirement planning to help clients get where they want to be when they retire.

Legacy outlines all the elements that individuals need to consider, going beyond simple advice on tax-advantaged retirement savings accounts to contribute to.

The Tulsa financial advisors at Legacy will coordinate with you to incorporate the following considerations into your retirement plan:

- Lifetime Income Needs
- Healthcare Needs
- Estate Protection

These financial planners in Tulsa will also help you decide between employer-sponsored qualified plans, compare traditional and Roth IRAs, and answer questions about other topics related to retirement like Social Security.

### **Client-Centric Investment Philosophy**

The Legacy Financial Group believes that portfolio management should be integrated into a client's full financial strategy. As such, all financial decisions are geared towards meeting their stated needs and objectives, whether it's retirement planning or a dream home purchase.

The investment philosophy used by these financial advisors in Tulsa is informed by Modern Portfolio Theory (MPT)), and incorporates the following core concepts:

- Asset allocation drives long-term performance
- Frequent trading and market timing increase costs and lower returns
- Portfolios tilted towards Small and Value companies increase returns
- Portfolio changes should be influenced by a client's life situation and goals instead of on market forecasts

### **Rating Summary**

The Legacy Financial Group believes in empowering its clients to reach their goals in life. This fee-only fiduciary firm provides clients with the highest standards of trust and transparency, two important elements in any successful financial planning relationship.

With an integrated approach and a strong commitment to putting their clients' best interests first always, The Legacy Financial Group scores a 5-star rating as one of the best financial advisors in Tulsa for you to consider working with this year.

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## **Warburton Capital Management Review**

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Helping clients make work optional is the main goal of [Warburton Capital Management](#). This Tulsa financial advisor works with a limited number of retired business owners and

professionals, engaging new clients only after they've determined they can bring them significant value.

As a fiduciary and [fee-only](#) Tulsa wealth management firm Warburton makes a strong commitment to their clients to always put their best interests first and foremost.

## **Key Factors That Enabled Warburton Capital Management to Rank as One of the Top Financial Advisors in Tulsa**

### **Fee-Only Fiduciary**

Warburton is deeply committed to the fiduciary standard. Rather than strengthen their own revenue stream, the firm's advisors are dedicated to helping clients preserve and grow their wealth.

This Tulsa wealth management firm is independent and does not accept any 3<sup>rd</sup> party commissions unless a client approves of it and it is in their best interests. In these ways, Warburton eliminates any potential conflict of interest ensuring trustworthy advice with no hidden agendas.

Another example of the firm's transparency is their FAQ section on their website which offers answers to a variety of questions that help potential clients better evaluate the firm.

### **Comprehensive Financial Services**

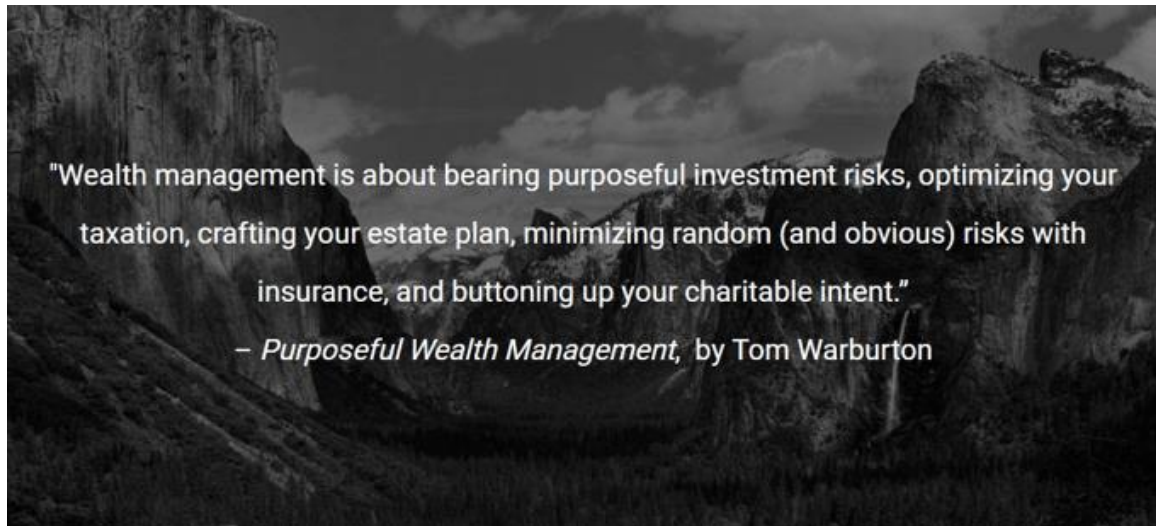
The Tulsa financial advisors at Warburton specialize in working with professionals and retired business owners with typically over \$1 million in investable assets.

Their Consultative Wealth Management process provides comprehensive financial solutions in three key areas – Investment Consulting, Advanced Planning, and Relationship Management.

These core areas cover the following:

- Smart Financial Decision: Preserving and growing liquid net worth
- Wealth Transfer: Enabling the efficient transfer of wealth from one generation to the next
- Wealth Enhancement: Integrating tax-efficient management into financial planning
- Wealth Protection: Insulating wealth accumulation from catastrophic loss
- Charitable Giving: Maximizing the benefits of philanthropic activities

- Client Relationship: Ongoing monitoring of client values, goals, needs, resources, and obligations
- Expert Team: Working in coordination with professional advisors, including attorneys, accountants, insurance agents and others



*Top-Rated Financial Advisors in Tulsa, OK*

### **Rating Summary**

With a specialized focus on professionals and retired business owners and a limited number of clients, Warburton offers exceptional value to their clientele that isn't found at many other Tulsa and OKC financial advisory firms.

The firm is also committed to financial education through its website blog that includes multiple financially-focused articles, and two books authored by the firm's Chairman & Director, Tom Warburton.

With an exceptional client retention rate and personalized service, Warburton Capital Management earns a 5-star rating as one of the best financial advisors in Tulsa to consider partnering with this year.

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## **InvesTrust Wealth Management Review**

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Providing a classic, boutique consulting experience, [InvesTrust Wealth Management](#) was founded in 1985 and serves ultra-high-net-worth families, foundations,

endowments, corporations, and corporate pension plans located in Oklahoma, Texas, and the Gulf Coast.

The firm is a fee-only wealth manager in Oklahoma City, OK that creates wholly unique investment strategies for each client.

## **Key Factors That Enabled InvesTrust Wealth Management to Rank as One of the Top Financial Planners in Oklahoma City**

### **Certified with Professional Designations**

The large, experienced team at InvesTrust covers a wide range of financial specialties. Additionally, these Oklahoma Financial Advisors have also earned an impressive range of industry designations and certifications.

Many of these designations incorporate ongoing education, which helps financial experts stay on top of the changing laws and practices within the financial services industry. These designations include:

- Master of Business Administration (MBA)
- Juris Doctor (JD)
- Chartered Financial Analyst (CFA®)
- Certified Trust & Financial Advisor (CTFA)
- Series 65 Registered Investment Advisor
- Certified Anti-Money Laundering Specialist (CAMS)
- Investment Advisor Certified Compliance Professional (IACCP®)
- Certified Public Accountant (CPA)

### **Expert Financial Services**

The Oklahoma City financial advisors at InvesTrust bring a diverse background in estate planning, banking, working with foundations, assisting non-profits, tax planning, and employee benefit plans, among others.

Their large team of professionals allow this wealth management firm in Oklahoma to handle a broad array of financial service needs, including:

- **Custodial**: InvesTrust can act as a trusted custodian for your money while managing the attendant transactions.
- **Investment Management**: In this capacity, InvesTrust looks for investment opportunities that fall within your risk tolerance and established time horizon. InvesTrust advisors custom tailor a unique financial plan for every client.
- **Trustee**: With this role, InvesTrust directly manages your wealth, typically in coordination with an accountant, lawyer, and financial institution. Together, they also manage your surviving family's financial needs.

## **Rating Summary**

InvesTrust Wealth Management offers exceptional value to their clients, with six distinct teams within the firm, each focused on different areas of financial and wealth management.

While the firm offers a wide range of experience and expertise, we found that their website is missing some key information, including details on the services clients can expect from the firm. This lack of information makes it more difficult for potential clients to evaluate the firm, which is why we've awarded them 3-stars.

By including additional details about investment philosophy, specific financial services and approaches, InvesTrust Wealth Management can easily improve both their value proposition to clients and their rating as one of the best financial planners in OKC.

***Related: Top Financial Advisors in Pittsburgh, Pennsylvania***

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## **Native American Fund Advisors (NAFA) Review**

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[Native American Fund Advisors](#) (NAFA) is both independent and locally owned, based in the heart of downtown Tulsa, OK. This financial advisory firm was established to offer competitive investment management and financial planning services.

The firm is a [fee-only](#) Tulsa financial advisor that utilizes multiple investment strategies to help their clients protect and grow their wealth.

### **Key Factors That Enabled Native American Fund Advisors to Rank as a Top Financial Advisor in Tulsa**

#### **A Process Tailored to You**

NAFA does not use “template” portfolios, preferring to craft an investment strategy centred around your distinct financial situation and future objectives. This guarantees a financial plan that helps each client reach their specific investment goals faster.

Factors such as time frame, risk tolerance, and desired rates of return are incorporated into each financial strategy. Once implemented, your Tulsa financial advisor manages your portfolio and updates it as needed to reflect any life changes.

The experts at NAFA never exceed your risk limit in favor of higher rates of return, nor will it depart from your agreed-upon investment approach without your approval.



### *2019 Best Financial Planning Firms in Oklahoma*

#### **Industry Licenses & Certifications**

The top-rated Tulsa financial advisors at NAFA have over 100 years of combined experience with diverse backgrounds that include expertise in finance, law, accounting, tax planning, and risk and asset management.

Their team also boasts a wide array of certifications and licensures. Some of these include:

- General Securities Agent (Series 7)
- General Securities Principal (Series 24)
- Uniform Investment Advisor (Series 65)
- Uniform Securities Agent State Law certificate (Series 63)
- Chartered Financial Analyst (CFA)
- Master of Business Administration (MBA)
- Certified Financial Planner (CFP®)

#### **Rating Summary**

Native American Fund Advisors operates with a high degree of transparency and integrity as a fee-only fiduciary Tulsa financial advisor. This client commitment allows them to start each relationship on a strong foundation of trust.



While the firm's investment management services and expertise are very strong, we found little information on the firm's website about their financial planning services. This lack of information makes it hard for potential clients to fully evaluate the firm and how they could benefit. For this reason, we've rated the firm with 3-stars.

By including information regarding financial planning services on their website, NAFA could easily improve both their value proposition to clients and their rating as a top financial advisor in Tulsa, Oklahoma.

***Don't Miss: Best Financial Advisors in Cincinnati, Ohio***

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## **Conclusion – 2019 Top 10 Financial Advisory Firms in Oklahoma City & Tulsa**

The financial advisory firms in Tulsa and Oklahoma City uphold high standards of integrity and provide an excellent level of personalized service, focusing on client needs first and foremost.

Now that your search for a top-rated wealth management firm in OKC or Tulsa has been narrowed down to the top 10, there are a few more steps to take to find the perfect firm to trust with your future financial plans.

Your next step would be to further narrow down the list of contenders by looking at the type of clientele the firm works with to see if they're a good fit. Next, you can review specialties, for example, some specialize in retirement planning, while others may work with business owners.

Once you have your list down to approximately three to five of the best financial advisors in Tulsa and OKC, schedule initial consultations to meet in person. Many of them offer these at no cost.

This personal meeting will help you evaluate how you work with the firm and if their style and process fit well with your own.

It takes some time to find a great financial advisor, but when your money and future dreams are on the line, it's time well spent that will pay off once your financial strategy is launched and begins bearing returns.

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## **Rate Table Disclaimer**

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

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Image sources:

- <https://pixabay.com/photos/downtown-tulsa-oklahoma-city-188848/>
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