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# **9 Best Financial Advisors in Iowa (Des Moines, Davenport, & Ames) | 2019 Ranking**

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## **2019 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN IOWA**

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### **AdvisoryHQ's 2019 Ranking of Top Financial Advisors in Des Moines, Ames, & Davenport (Iowa)**

Iowa has been known as one of the safest states in which to live and has a wealth of agricultural resources. Residents looking to manage their own resources and grow their wealth could use the help of a top Iowa financial advisor.

Financial advisory firms help provide a strategy to manage and increase your assets. They can guide you down the right path whether you're saving for educational needs, want to have enough money to retire early, or need help with smart investing.

But finding the best wealth management firm in Des Moines, Ames, Davenport, or anywhere else in Iowa can be a time-consuming task. How do you know which firms you can trust and that will have the services you need?

You can search through hundreds of firms or take a shortcut by using our list of the Top 9 Best Financial Advisors in Iowa as your guide.

In this listing of the top-rated Iowa financial planning firms, you'll find details on fee structure, philosophies, clientele, and specialties that each of these wealth management firms provides.

We'll also include highlights that made each wealth management firm in Iowa stand out and explain the differences between the two main fee structures and tell you which one each firm operates under.

If you've been wanting to get more control of your finances and put yourself on a path to reaching your dreams and goals for the future, read on to find an Iowa financial professional that can help you get there.



*Award Emblem: Top 9 Best Financial Advisors in Iowa (Des Moines, Ames & Davenport)*

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## **Top 9 Financial Advisors in Des Moines, Ames & Davenport, Iowa | Brief Comparison & Ranking**

<b>Best Financial Advisors in Iowa</b>	<b>2019 Ratings</b>
Foster Group, Inc.	5
Marrs Wealth Management, LLC	5
Quad Cities Investment Group	5
Steele Capital Management	5
Sverson Strege	5
Waddell & Reed	5
Compass Financial Services	3
HJN Advisor	3
West Financial Advisors	3

*Table: Top 9 Best Financial Advisors in Iowa | Above list is sorted by rating*

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## Fee-Based vs Fee-Only Financial Advisory Firms in Iowa

There are two main types of fee structures used by Iowa financial planning firms, “fee-only” and “fee-based.” It’s important to know the difference between them because it impacts your relationship with your financial advisor.

Below, we’ll provide you with a brief overview of everything you need to know about the differences between fee-based and fee-only Iowa financial advisors.

### Fee-Only Iowa Financial Advisors

When a wealth management firm or financial planner states they are “[fee-only](#)” this means that they only accept client fees as compensation. They do not accept any outside commissions or incentives from firms that sell financial products.

This allows them to provide completely unbiased advice because there are no incentives for recommending one financial product over another.

In short, a fee-only financial planner in Iowa is in a better position to act solely in the interest of their clients.

### Fee-Based Iowa Financial Advisors

When a firm is “[fee-based](#),” this means that in addition to client fees, they may also receive compensation in the form of commissions or incentives from third-party companies that sell financial products.

Because the fee-based structure has some inherent potential conflict of interest, many fee-based firms are also fiduciaries. This fiduciary commitment can often counteract the potential for conflict.

As a fiduciary, a financial advisor in Iowa takes on a legal obligation to put the best interests of their clients ahead of their own and to fully disclose any conflicts of interest and be completely transparent about fees.



*Top-Rated Financial Management Firms in Iowa 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 Iowa Wealth Management Firms**

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

- [Foster Group, Inc.](#)
- [Marrs Wealth Management, LLC](#)
- [Quad Cities Investment Group](#)
- [Steele Capital Management](#)

- [Syverson, Strege](#)
- [Waddell & Reed](#)
- [Compass Financial Services](#)
- [HJN Advisors](#)
- [West Financial Advisors](#)

Click below for previous years' rankings:

- **2018 Review:** [Top 9 Best Financial Advisors in Iowa \(Des Moines, Davenport & Ames\)](#)
- **2017 Review:** [Top Ranked Financial Advisors \(Iowa\)](#)
- **2016 Review:** [Top 8 Best Financial Advisors in Iowa](#)

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## Foster Group, Inc. Review

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Founded in 1989, [Foster Group, Inc.](#) is committed to helping their clients flourish. They have offices in West Des Moines, IA and Omaha, NE. They work with a wide variety of clients, including individuals, families, healthcare professionals, business owners, and institutions.

They are [fee-only](#) financial advisors in Des Moines that take a values-driven approach and are in constant pursuit of providing the best experience for their clients.

### **Key Factors That Enabled Foster Group, Inc. to Rank as One of the Best Financial Advisors in Des Moines**

#### **Guiding Principles**

This team of Des Moines financial advisors believes that what's right for their clients is right, period. Foster Group ingrains service to their customers in everything they do from their financial and investment approaches to their client education.

Everyone at Foster Group shares in the responsibility of fostering your financial success. As such, each team member works to exemplify the principles that guide their company culture, values, and work ethic.

This Des Moines financial advisor proclaims in their vision:

*“We will influence thousands of individuals, families, and organizations with wise financial counsel while encouraging the pursuit of meaningful living and generous giving.”*

## **Customized Financial Services**

As one of the top-rated wealth management firms in Des Moines, Iowa, Foster Group offers investment management, financial planning, and relationship management for a broad range of clients.

Each service is customized to provide the greatest value based on background and financial needs, creating a truly personalized financial planning experience. The clients Foster Group serves include:

- Individuals and Families: Based on a solid foundation of long-term relationships and market expertise
- Doctors and Healthcare Professionals: They work with over 500 healthcare professionals providing a holistic approach to financial management
- Accountants, Attorneys, and Insurance Professionals: All aspects of financial planning and investment management are combined for an integrated approach
- Business Owners and Executives: Addresses financial services like retirement plans, succession planning, business transitions, and leadership incentives
- Institutions: With a long history of serving institutional clients, they address the unique financial needs and goals of institutions
- Company Retirement Plans: Over 25 years of experience in plan design coordination, participant engagement, and more

## **Rating Summary**

Foster Group offers a strong foundation of trust with their fee-only structure and fiduciary commitment to put their clients' best interest first always.

Their expertise in a wide range of client specialties such as healthcare professionals, accountants, and attorneys, make them an excellent option for many professionals seeking expert wealth management in Iowa.

Their client-centric values, and long-term commitment to helping clients flourish earn Foster Group a 5-star rating as one of the best financial advisors in Des Moines to consider partnering with this year.

***Don't Miss: Top Financial Advisors in Omaha, Nebraska***

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## Marrs Wealth Management, LLC Review

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[Marrs Wealth Management, LLC](#) was founded in 2010 with the mission of being the foremost trusted and knowledgeable financial advisor in Central Iowa. They're based in Ames and serve clients throughout the surrounding area.

The firm is an independent, [fee-only](#) Iowa wealth management firm that takes a long-term approach to financial planning backed by modern technology.

### **Key Factors That Enabled Marrs Wealth Management, LLC to Rank as a Top Iowa Wealth Management Firm**

#### **Personal Wealth Management**

Personally-tailored and independent advice is offered by not just one member of the Marrs Wealth team, but rather the whole organization.

These financial advisors in Iowa work to help clients balance current obligations with dreams and objectives for the future. They offer the following broad range of financial services with the added benefit of a fiduciary commitment:

- Investment Management
- Tax Planning
- Cash Flow & Debt Reduction
- Retirement Planning
- Estate Planning
- Insurance Analysis
- Social Security Planning
- Asset Allocation



## *Iowa's Best Wealth Management Firms*

### **Comprehensive Process**

The financial planning process can be intimidating for those new to working with a financial advisor, but MARRS works to make it as easy and straight-forward as possible. This makes them a great Ames, Iowa financial advisor for those new to investing.

Their comprehensive wealth management process includes the following steps:

- Initial Meeting: The top Iowa financial advisors at MARRS take the time to get to know you and learn about your financial needs and goals for the future.
- Creating Your Plan: Next, a plan is created that will explore a variety of options and your advisor will make recommendations based upon your objectives.
- Implement the Plan: These wealth managers in Iowa will work side-by-side with you to implement your financial strategy, coordinating with other professionals as needed.
- Continued Support/Monitoring: You'll meet with your MARRS wealth management team regularly to adjust your plan as needed for any new milestones in life.

### **Rating Summary**

For investors looking for a comprehensive approach to financial management that puts them at the center of the plan, MARRS Wealth provides an excellent option to partner with.

They put a strong emphasis on balancing needs with future goals, helping guide their clients to well-balanced strategy for success.

With a wide range of financial advisory services and a fiduciary commitment to trust and transparency, MARRS Wealth Management solidifies their 5-star rating as one of the best financial advisors in Iowa to consider partnering with in 2019.

***Popular Article: Best Financial Advisors in Atlanta, Georgia***



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## Quad Cities Investment Group, LLC Review

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Committed to serving clients with integrity, [Quad Cities Investment Group, LLC](#) offers personalized and independent financial advisory services from their Davenport, Iowa location.

While Quad Cities does not specifically state whether they are a fee-only or fee-based wealth management firm in Iowa, they are [likely fee-based](#), as certain advisers may earn commissions from insurance sales.

They note that they counteract this conflict by retaining and reviewing all orders to verify that there is an economic benefit for the client. As always, we recommend confirming an advisor's compensation structure before contracting their services.

### **Key Factors That Enabled Quad Cities Investment Group to Rank as a Top Iowa Wealth Management Firm**

#### **Knowledge Center**

Top-rated financial advisory firms in Iowa helps foster client education. Being informed about what is happening in your financial world is critical for making informed financial decisions.

Quad Cities Investment Group offers a wide range of market commentary, research, and financial news on their website that is accessible 24/7 through their [Knowledge Center](#).

Whether you are just beginning to learn how to manage your money or have been investing for a while, these resources in the forms of videos, articles, infographics, will help broaden your financial literacy and how the market affects your overall financial health.

#### **The Planning Process**

With good financial planning, you're more equipped to handle any challenges that come up in life while staying on track for your future goals.

Through the application of four planning objectives, Quad Cities Investment Group helps clients take on anything that may come their way through:

- **Listening:** The most important aspect of a plan is understanding the personal needs of every client. This begins with a conversation and evolves into an analysis

of your feelings about risks, goals, and current financial status.

- **Planning:** Once there is a clear grasp of your financial goals and circumstances, a long-term customized strategy is created based entirely on your financial well-being.
- **Guiding:** Circumstances can change, both personally and through market fluctuations. Your financial advisor in Iowa will coordinate with you to address any concerns or life changes that may impact your portfolio.
- **Protecting:** Your investment plan is continually cared for with disciplined investment management and rebalancing process. You are given complete performance reporting, and your portfolio is regularly reviewed to chart overall progress against benchmarks.

### **Rating Summary**

Serving their clients with a custom approach that incorporates their objectives, risk tolerance, and goals for the future, Quad Cities Investment Group offers a targeted and flexible approach for anyone considering financial advisors in Davenport, Iowa.

With a full range of services for individuals and businesses and a measured, disciplined approach, Quad Cities Investment Group scores a 5-star rating and is one of the best financial advisors in Iowa to consider partnering with this year.

***Read More: Top Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota)***

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## **Steele Capital Management, Inc. Review**

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Founded in 1996, [Steele Capital Management, Inc.](#) is a Registered Investment Advisor (RIA) that serves clients across the nation from locations in West Des Moines and Dubuque, Iowa.

As a [fee-only](#) financial advisor in Des Moines, they provide unbiased, superior financial solutions to individuals, businesses, and organizations.

**Key Factors That Enabled Steele Capital to Rank as One of the Best Financial Advisors in Des Moines**

## **Financial Planning and Wealth Management**

Basic wealth management is the core of any financial portfolio. At Steele Capital, they make keeping track of your assets easier through account aggregation technology. This allows all assets to be linked to one source, including credit cards, life insurance policies, 401(K)s, and annuities.

Clients also have complete access to all financial planning tools associated with your plan, giving them the flexibility to generate and print multiple reports and projections, such as retirement risk.

These financial advisors in Iowa offer comprehensive financial planning that addresses aspects such as:

- Cash Flow Management
- Social Security Maximization
- Tax Strategies
- Education Funding
- Retirement Planning
- Estate Planning
- Family Roadmap
- Investment Management



*Top Financial Advisory Firms in Des Moines, IA*

## **Family Roadmap**

While a conversation about death and what will happen to your estate when you pass on is never an easy one, it's one that can ensure your family is prepared financially for the future.

The financial advisors at Steele Capital Management help to make planning for your legacy as easy as possible through their Family Roadmap process and work with you to designate one or more Financial Delegates.

Steele advisors will notify each delegate of their role in settling your financial matters once that time comes and will ensure they have the necessary access to your Personal Financial Website when needed.

## **Rating Summary**

As an independent, fee-only financial advisor in Des Moines, Steele Capital Management believes in building long-term relationships set upon a foundation of trust and friendship.

Their integrated approach to wealth management both during life and afterward make them a valuable partner to families who would like to ensure their finances are taken care of throughout generations.

With a client-centered approach and a full range of financial services, Steele Capital Management earns a 5-star rating as one of the best financial advisors in Des Moines to consider partnering with in 2019.

***Related: Best Financial Advisors in Lexington & Louisville, Kentucky***

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## **Syverson Strege Review**

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Founded on core values that include integrity and compassion, [Syverson Strege](#) is a top-rated financial planning firm located in West Des Moines, Iowa.

This [fee-only](#) independent investment management firm was founded in 1997 and has a separate division for investments called Sherpa Investment Management. The firm offers client-focused, goal-oriented financial planning services.

**Key Factors That Enabled Syverson Strege to Rank as a Top Iowa Wealth Management Firm**

## **Your Financial Plan**

The expert financial advisors at Syverson Strege help steer clients through the confusion of wealth management, giving them the reassurance that their financial needs are being addressed by a firm that truly cares about their wellbeing.

Whether transitioning from one phase of life to another, hitting complexities in your financial situation, or managing a business, clients can take advantage of a variety of services, including:

- Income Tax Planning
- Pre- & Post-Retirement Planning
- Cash Flow Management
- Philanthropic Planning
- Investment Management
- Estate Planning
- Insurance Planning
- Legacy Planning

## **Dedicated Investment Management**

This top Iowa wealth management firm's investment division, Sherpa Investment Management, was named for those elite mountaineers that do whatever is necessary to help their client reach the summit.

They remain an independent, fee-only fiduciary that's not obligated to any third-party firms, which frees them to provide expert investment management based solely on your needs and dreams for the future.

This wealth management firm in Des Moines has experience serving the following clientele:

- Individuals and families
- Endowments and foundations
- Charitable trusts
- Non-profit organizations

## **Rating Summary**

Syverson Strege provides a foundation of integrity, trustworthiness, and a positive attitude for clients looking for expert financial planning and investment management services.

Their broad range of knowledge, experience, and industry accreditations, along with their client-first commitment help solidify a 5-star rating for Syverson Strege as a top Iowa wealth management firm to consider working with in 2019.

***Don't Miss: Top Financial Advisors in St. Louis, MO***

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## **Waddell & Reed Review**

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[Waddell & Reed](#) has a rich history, being founded by two World War I veterans back in 1937. Today the firm works with individuals, families, and businesses throughout the country and is a subsidiary of publicly traded Waddell & Reed Financial, Inc.

This is a [fee-based](#) financial advisor with multiple offices, including four in Iowa, in Des Moines, Davenport, Cedar Rapids, and Dubuque.

While we typically prefer to rank fee-only firms, we have included Waddell & Reed for their wide range of financial services, educational resources, and the fiduciary commitment they make to their clients.

### **Key Factors That Enabled Waddell & Reed to Rank as One of the Best Financial Advisors in Des Moines**

#### **Wide Range of Investment Products & Services**

If you prefer to get multiple financial services from one advisor, you'll appreciate the wide range of products and services offered by this top financial advisor in Des Moines.

Waddell & Reed believes that no two clients are alike and that investment products should be custom tailored to meet different specialized needs.

The services and products offered by this Des Moines wealth management firm include:

- [Individual Retirement Plans](#): Traditional, Roth, and Rollover IRAs as primary or supplemental retirement savings vehicles
- [Advisory Programs](#): Customized investment models, strategic portfolio allocation, guidance, and more
- [Education Funding](#): Financial tools and savings products to invest for education
- [Insurance](#): Identifying the right types of coverage to protect your assets
- [Business Retirement Plans](#): Your Des Moines financial advisor helps with sponsored retirement plans, risk management services, and financial education programs

- Financial Planning Services: Developing investment strategies, planning for retirement, evaluating risk management needs, and more
- Investments: Staying focused on long-term goals and prioritizing to meet your financial objectives
- Gifting or Giving Strategies: Efficient and impactful charitable giving, estate giving planning



*Iowa's Best Wealth Management Firms 2019*

## **Educational Resources**

While partnering with a Certified Financial Planner in Iowa is a great way to jump-start your financial management, long-term financial health often comes from learning more about finances in order to make smart money decisions.

Waddell & Reed provides both clients and non-clients alike a full range of educational resources to promote financial literacy, including:

- Articles
- Financial Calculators
- Newsletters
- Glossary
- Videos
- Tax Library

Additionally, the firm also offers resources for investors that would like to learn more about the market, like company quotes, real-time trend data, daily overviews of market performance, and more.

### **Rating Summary**

Waddell & Reed offers a full range of financial planning and investment services, all delivered with a fiduciary commitment to be completely transparent about fees and to put their clients' best interest ahead of their own.

Their focus on financial education, experienced team, and welcoming approach all helped earn Waddell & Reed a 5-star rating as one of the top financial advisors in Des Moines to consider partnering with this year.

***Popular Article: Top Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee***

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## **Compass Financial Services Review**

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With a goal to help people match their dollars to their dreams, [Compass Financial Services](#) has been helping clients realize their financial goals since 1997.

Because their advisors may receive commissions from the sale of certain financial products, Compass Financial Services is a [fee-based](#) financial advisor in Iowa. They have an office in Des Moines, and an appointment only location in Adel.

We have included Compass Financial Services as a top wealth management firm in Des Moines due to their commitment to independence, creating a safe place for clients, and the wide range of services they offer.

### **Key Factors That Enabled Compass Financial Services to Rank as One of the Best Financial Advisors in Des Moines**

#### **Education-Based Financial Planning**

Working with a financial advisor for the first time can be intimidating. Communication is key to helping clients feel at ease and they're a part of the financial planning process.

The advisors at Compass go out of their way to help their clients come from a place of confidence and understanding.



This Des Moines financial advisor offers an education-based approach to financial planning, prioritizing listening and helping clients understand the different facets of their financial strategy.

With this approach, the client is being educated instead of directed. Areas of education-based financial planning include:

- Net Worth Analysis
- Estate Planning
- Education Planning
- Cash Flow Management Techniques
- Retirement Income Planning
- Insurance and Risk Analysis
- Investment Evaluation and Strategy

### **Retirement Planning**

Transitioning from life as an employee to a retiree can be challenging, but proper planning can ensure that you're prepared financially for a comfortable retirement.

Even if you have actively saved your money in anticipation, there are many factors that you may not have anticipated. Some of the financial challenges that a financial advisor in Des Moines like Compass can help you with include:

- Shifting your assets from growth mode to income mode
- Being prepared for the possibility of health issues and long-term care in retirement
- Hypotheticals of the amount of retirement income you'll need
- A conversation about the retirement lifestyle you desire and what it will take to get there

### **Rating Summary**

Compass Financial Services offers clients the convenience of getting a full range of financial planning and investment services from one experienced team. Their focus on client education also makes them an excellent Iowa financial advisor for new investors.

While Compass Financial Services is an independent firm with a strong set of ethics-driven principals, our review was unable to find any evidence of a fiduciary commitment, ultimately earning the firm a 3-star rating.

A fiduciary commitment provides an extra layer of transparency for fee-based financial advisors and ensures that a firm always puts the client's interests first. This fiduciary commitment is critical to ensuring that financial advice is truly unbiased.

By taking on a fiduciary role, or by clearly stating an existing commitment, Compass Financial Services could easily improve both their value proposition to clients and their ranking as one of the best financial advisors in Des Moines.

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

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## **HJN Advisors, LLP Review**

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[HJN Advisors](#) is centered on putting their clients first and delivering high quality investment management, estate planning, multi-generational wealth strategies, along with other financial management services.

The firm was founded in 2007 and is based in Des Moines, Iowa. Their advisors have worked to earn the trust and confidence of clients, the community, and the families of central Iowa.

HJN does not explicitly state their fee structure, however, the firm is likely [fee-based](#) as their ADV states that commissions may be earned by advisors on insurance and other financial products. The firm upholds a fiduciary commitment to clients.

We always recommend that potential clients confirm a firm's compensation structure before partnering with any Iowa financial advisor.

### **Key Factors That Enabled HJN Advisors, LLP to Rank One of the Best Financial Advisors in Des Moines**

#### **An Experienced Team**

With over 150 years of combined financial experience, clients benefit greatly from the seasoned team at this top Des Moines financial advisory firm.

Starting with their three founding partners and including their operational and administrative staff, the team has a range of real-world experience which includes all areas of financial management, accounting, tax planning, technology, and more.

#### **Family Office Services**

For families that have multigenerational wealth, finances can get complicated. As such, many clients seek a thoughtful, business approach to their family's wealth management.

The Iowa financial advisors at HJN Advisors have designed a functional process of discovery, analysis, solution design, implementation, and review to address every facet of your financial future.

Some of their specific wealth management categories include:

- Planning: HJN Advisors seek to craft a plan that will get clients from point A to point B while minimizing distractions and detours that naturally occur during any particular stage of life and planning.
- Family Governance: Through the facilitation of family meetings, clients can establish rules and regulations, set the framework for their investments, and determine roles and responsibilities within their financial management strategy.
- Risk Management: These Des Moines financial advisors employ a data-based model that is both sophisticated and comprehensive and allows clients to make informed decisions that will help to balance their risk.
- Portfolio and Asset Management: With a system that utilizes both visual and numerical data, these Des Moines wealth managers provide advice and ensure that each portfolio is managed and reviewed on a consistent basis.
- Investments: Understanding the intricacies of traditional versus alternative investing requires an exceptional level of knowledge and expertise, including everything from U.S. corporate bonds to equities and private placements.



*Des Moines, Iowa Top-Rated Financial Planning Firms*

## Rating Summary

HJN Advisors provides individuals and families with a full range of expert financial services from an experienced team that has their client's best interests at heart. Their fiduciary commitment also offers a foundation of trust and transparency for the client-advisor relationship.

One area where HJN fell short of other Iowa financial advisory firms was in their descriptions of the services they offer. This lack of information can make it difficult for potential investors to fully evaluate their capabilities. For this reason, we've scored HJN with 3-stars

By adding specific details about how each financial service enables the firm to help clients and by stating their fee structure, HJN Advisors could improve both their value proposition to clients and their rating as a top financial advisor in Des Moines, Iowa.

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

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## West Financial Advisors Review

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With a passion for helping people grow and protect their wealth, [West Financial Advisors](#) takes a comprehensive approach to wealth management. They work with a wide variety of clients, including professionals, executives, state employees, retirees, women, and couples.

The firm is a [fee-only](#) Des Moines independent financial advisor that is also a fiduciary, exemplifying a high standard of trust and client commitment.

### **Key Factors That Enabled West Financial Advisors to Rank as One of the Best Financial Advisors in Des Moines**

#### **Fee-Only Fiduciary**

When it comes to trusting a financial advisor in Iowa with your money, firms that have a high ethical commitment are in high demand.

A great way to ensure that your finances are in good hands is to choose a financial advisor that has adopted a fiduciary mindset. For West Financial Advisors, this fiduciary commitment is a core value, ensuring that financial advice is given purely in the best interests of the client.

Their fee-only structure supports this approach, minimizing conflicts by eliminating commission-based transactions. As such, clients can rest easy that their financial health is always being considered first, establishing a strong foundation of trust within the client-advisor relationship.

### **Client-Centric Approach**

At West Financial Advisors, financial planning is centered around a client's current financial needs and goals for the future. Their straight-forward approach focuses on four key elements:

- Discover: The firm helps clients identify their values and begin shaping a vision for their future
- Plan: Using sophisticated modeling and analysis, a CFP® professional creates a unique action plan to minimize risk and maximize results
- Grow: Financial plans are evergreen, allowing for strategies to grow and fluctuate as goals and needs change over time
- Protect: Advisors meet regularly with clients to update, review, and offer confidence through continuous progress reports

### **Rating Summary**

West Financial Advisors offers clients the gold standard of Iowa financial advisory firms, which is being both fee-only and a fiduciary. This ensures their advice is completely centered on the client's needs without any hidden agendas.

One area where the firm is lacking is in the information provided on their financial management services, which is very little. For clients searching for a new Iowa financial planner, this can make it more difficult to fully evaluate the breadth of the firm's capabilities.

Due to that lack of information, we've scored them with 3-stars. By including more detail about specific financial services, West Financial Advisors could easily improve both their value proposition to clients and their rating as one of the best financial advisors in Des Moines, Iowa.

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## **Conclusion — 2019 Top Financial Advisory Firms in Des Moines, Ames, Dubuque, and Davenport (Iowa)**

Whether you're planning for retirement, are looking for a long-term partner for multigenerational wealth planning, or would just like to make some smart investments, one of these Iowa financial planners can help you reach your goals.

While it can seem overwhelming at first to choose a wealth management firm, if you use this top list as your guide, your next step would be to narrow down your potential options to possibly 3 to 5 firms.

Next, you'll want to schedule an initial "get to know you" meeting to discuss your finances and goals for the future. This will help you get a better feel for working with the firm's team and help you make the best choice for a long-term financial guide.

Once you get through the initial process, your anxiety level should become much lower and you and your top Iowa financial advisor can enjoy the process of crafting your personalized financial plan to help you bring your dreams to reality.

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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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