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# **11 Best Financial Advisors in Orlando, FL | 2019 Ranking**

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## **2019 RANKING AND REVIEWS BEST FINANCIAL ADVISORS IN ORLANDO, FLORIDA**

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### **Ranking for the Top Financial Advisors for 2019 in Orlando, Altamonte Springs, & Winter Park**

Orlando is known globally as a prime vacation spot, with amusement parks and world-class hotels and restaurants. While the area receives over 70 million tourists a year, there are many people that call Orlando home full time and who are on the lookout for ways to protect and growth their money.

Whether you're saving for a dream vacation, would like the option to retire early, or have generational wealth that you need help investing tax efficiently, top Orlando financial advisors can help you create a roadmap to success.

Wealth managers and financial planners typically have decades of experience working with multiple investment vehicles, understanding their clients' anxieties about money management, and providing comprehensive solutions to reach financial goals.

But something that holds many people back from taking that first step with an Orlando wealth management firm is the time it takes to find the best ones to consider.

That's where AdvisoryHQ comes in. We help simplify the process for you by researching hundreds of financial advisors each year and coming up with the cream of the crop in cities across the U.S.

In the city of Orlando, we've identified 11 top financial advisors that stand apart from the crowd. From custom tailored portfolios to full-service financial offerings, you can count on these financial planners to have your best interests at heart.

If you've dreamed of being able to do more with your money and see it grow to support your future goals, then you'll want to read through this list of the best wealth management firms in Orlando to find the perfect partner to help you make that happen.



*Award Emblem: Top 11 Best Financial Advisors in Orlando, Altamonte Springs, & Winter Park, FL*

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## **Top 11 Financial Advisors in Orlando, Altamonte Springs, & Winter Park | Brief Comparison & Ranking**

<b>Best Financial Advisors in Orlando</b>	<b>2019 Ratings</b>
Allgen Financial Advisors	5
American Financial Advisors	5
AndCo Consulting	5
Certified Financial Group, Inc.	5
Moisand Fitzgerald Tamayo LLC	5
Nelson Financial Planning	5
Resource Consulting Group	5
Ronald Blue Trust	5
WaterOak Advisors	5
FirsTrust	3
Signature Wealth Advisors	3

*Table: Top 11 Best Financial Advisors in Orlando, Altamonte Springs, & Winter Park |  
Above list is sorted by rating*

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## **Tips for Choosing the Best Financial Advisors in Orlando, FL**

If you're new to working with an Orlando financial planning firm, narrowing down a list to your top handful of choices can be challenging. At first glance the firms may look very similar, which leaves you grasping for ways to differentiate them.

Once you know a few key things to look for, however, the search will become much easier, because it's all about knowing the main factors that can set one top wealth management firm in Orlando apart from another.

Here are a few tips for those main factors to look for.

### **What types of Clients Do They Work With?**

This often is the first way you can identify whether an Orlando money management firm is the right fit for you. Some of them only work with high-net-worth clients and have a minimum investable asset level that may be in the millions.

Other firms work with all wealth levels and don't have any minimum asset requirements.

### **Are They Fee-only, Fee-based, or a Fiduciary?**

If you're looking for a firm that doesn't have any conflicts of interest, you'll want one that is fee-only because they don't accept any outside commissions or incentives for sale or recommendation of financial products.

A fee-based firm is free to accept commissions from companies that sell financial products, which can have some inherent conflict of interest attached. Which is why you'll want to look for a fee-based firm to be a fiduciary. This means they take on a legal obligation to put their client's best interest ahead of their own, despite any commissions.

### **Do They Offer All the Services You Need?**

If you need family office services, you'll want to check for that capability by an Orlando financial advisory firm you're reviewing. If you are looking for some tax help along with investment planning, check to make sure a firm offers that.

While most firms in Orlando offer both financial planning and investment services, not all offer other additional services that you might be interested in, so reviewing all their service offering is another way to sort one financial advisor from another.



*Top-Rated Financial Advisors in Orlando 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 Financial Advisors in Orlando, Florida**

Below, please find the detailed review of each firm on our list of 2019 best financial planners in Orlando. We have highlighted some of the factors that allowed these Orlando wealth management firms to score so high in our selection ranking.

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Click on any of the names below to go directly to the review section for that firm.

- [Allgen Financial Advisors](#)
- [American Financial Advisors](#)
- [AndCo Consulting](#)
- [Certified Financial Group, Inc.](#)
- [Moisand Fitzgerald Tamayo, LLC](#)
- [Nelson Financial Planning](#)
- [Resource Consulting Group](#)
- [Ronald Blue Trust](#)
- [WaterOak Advisors](#)
- [FirsTrust](#)
- [Signature Wealth Advisors](#)

Click below for previous years' rankings:

- **2018 Review: [Top 10 Best Financial Advisors in Orlando, FL](#)**
- **2017 Review: [Top 8 Best Wealth Management Firms in Orlando](#)**
- **2016 Review: [Top 9 Best Financial Advisors in Orlando](#)**

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## Allgen Financial Advisors Review

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Putting people before profits, [Allgen Financial Advisors](#) pledges to put their clients' best interest first when it comes to all decisions. The firm's headquartered in Orlando and provide highly tailored financial planning solutions to clients throughout the U.S. and abroad.

As a [fee-based](#) Orlando financial advisor, we have included them on our top-rated list for their independence, fiduciary commitment, and client-centric approach.

### **Key Factors That Enabled Allgen Financial Advisors to Rank as a Top Orlando Wealth Management Firm**

#### **Design Your Path to Success**

Allgen Financial helps clients design a path to success with a comprehensive three-step process. No matter where you currently are, this Orlando financial advisory firm has a roadmap to get you to the next step through the three fundamental life stages:

#### Foundation

If you are beginning from scratch with a financial plan, have no emergency fund, and working on paying on debt, you may want to start here. Your Orlando financial advisor will help you:

- Determine your net worth
- Create a spending plan
- Develop risk management strategies
- Develop a plan to eliminate debt

### Formation

Do you have your current finances under control but need to start looking into investments, retirement, or education planning for your children? This step allows you to build on what you already have, as your Orlando financial planner will help you:

- Plan for retirement
- Maximize investments
- Develop a plan for upcoming education costs
- Create a strategy for paying your mortgage

### Freedom

Do you feel that you are already financially free? Allgen Financial can show you how to maximize your investments and minimize your tax liabilities. These financial advisors in Orlando will assist you with:

- Protecting assets from ongoing expenses
- Creating an estate plan
- Collaborating with other professionals for long-term success
- Utilizing resources for charitable goals



### *Top-Rated Orlando Wealth Management Firms*

#### **Investment Management**

Wealth is rarely built overnight. But through thoughtful investing, wealth can accumulate and set you up for a secure future. Allgen Financial has a team of highly qualified financial advisors in Orlando who know how to invest on your behalf through:

- Current financial situation, goals, and timeline
- Wide range of investment options
- Screening for securities that have the highest return and the lowest risk
- Prioritizing risk management to match your personal objectives

#### **Rating Summary**

Allgen Financial Advisors offers clients a truly customized experience and also gives them peace of mind with a fiduciary commitment that puts their needs above all else. Their comprehensive plans simplify the financial planning process even for newcomers.

With a full array of services, a highly experienced team, and a client-centered philosophy, Allgen solidifies their 5-star rating as one of the best financial advisors in Orlando to consider partnering with this year.



**See Also: [Best Financial Advisors in D.C., Maryland, and Virginia \(Tri-State\)](#)**

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## American Financial Advisors Review

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[American Financial Advisors](#) is a registered investment advisory firm in Orlando that serves clients nationwide. They were founded in 1989 and are committed to working through accountable practices to root every decision in sound financial logic.

This Orlando wealth management firm is a fiduciary and does not specify whether they provide fee-only or fee-based services. Their [ADV](#) makes note that some advisors receive commissions from sales of insurance, which points to them being fee-based.

As always, we recommend verifying fee structure before partnering with any financial advisor in Orlando.

### **Key Factors That Enabled American Financial Advisors to Rank as a Top Financial Planner in Orlando**

#### **Value-Driven Fiduciary**

As one of the top-rated Orlando financial advisors, American Financial adheres to the fiduciary standard of service, which exemplifies the highest standards of transparency, trust, accountability, and candor within the client-advisor relationship.

Along with a fiduciary commitment, the team of Orlando financial planners at American Financial strives to embody the following values in everything they do:

- **Integrity**: Mutual trust and principled actions create a strong foundation for positive, long-term relationships
- **Accountability**: All actions taken must be justifiable and explainable and with the client's best interest in mind
- **Service**: These Orlando financial advisors are active participants in their clients' success, working to meet their needs every step of the way
- **Performance**: American Financial will always be on top of their game when it comes to driving results
- **Innovation**: Financial planning should be tailored to fit each client, as no two clients will have the same needs and goals



## Focus on Pilots

To address the unique financial challenges faced by airline pilots, American Financial provides a range of specialty services that are designed to fit the distinct needs of this client segment.

Investment management and financial planning services for pilots includes, but is not limited to:

- “Equity Distribution to IRA Rollover” analysis
- Pre-retirement planning
- Regular investment updates focused on pilot-specific topics
- Establishing asset allocation and rebalancing as needed
- Assistance with retirement process and forms
- Retiree medical insurance options
- Survivorship planning
- Estate and legacy planning

## Rating Summary

American Financial takes the time to listen, and their advisors truly care about their clients’ financial wellbeing. They have a strong commitment to always being transparent and making every decision in the best interest of their client.

With a wide range of financial services, and a unique specialty in serving airline pilots, and an experienced team, American Financial scores a 5-star rating as a top Orlando financial planner to consider partnering with in 2019.

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# AndCo Consulting Review

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Founded with a client-first philosophy, [AndCo Consulting](#) is an independent wealth management firm and fiduciary in Orlando that has eight offices throughout the country.

AndCo does not explicitly state whether they are a fee-only or fee-based firm, however their [ADV](#) states that “AndCo is never compensated in any form by the recommended investment advisors or any 3rd party for those recommendations.”

This would point to the firm being fee-only, but we always recommend you confirm fee structure before working with an Orlando, Florida financial advisor.

## **Key Factors That Enabled AndCo Consulting to Rank as a Top Orlando Wealth Management Firm**

### **Experienced Team**

Partnering with AndCo offers clients access to a large, dynamic team of 90 professionals who collectively bring decades of wealth management experience to the table.

In fact, 38 of their investment consultants average over 20 years of experience within the industry. Collectively, the team of Orlando financial advisors at AndCo includes:

- 22 CFA charterholders (Chartered Financial Analyst)
- 7 CAIA charterholders (Chartered Alternative Investment Analyst)
- 3 CIPM charterholders (Certified Investment Performance Measurement)
- 3 CFP® professionals (Certified Financial Planner)
- 4 CIMA professionals (Certified Investment Management Analyst)

Additionally, 29 team members hold advanced degrees, demonstrating a strong focus on ongoing education and industry leadership at this Orlando financial advisory firm.

### **Endowment and Foundation Services**

As a top Orlando wealth management firm, AndCo works with more than just private individuals. They also help endowments meet their budgetary requirements and ensure longevity through tailored investment portfolios.

This financial advisor in Orlando includes colleges, universities, hospitals, and more among its institutional clients. Specific endowment and foundation services include:

- Investment policy development and review
- Spending policy development and review
- Strategic asset allocation and portfolio structure
- Investment manager/strategy identification, evaluation, and recommendation
- Customized monthly, quarterly, and special request investment reports
- Quarterly economic summary
- Board/investment committee education
- Ongoing investment manager due diligence
- Professional service provider evaluation
- Special project coordination and execution



## *Orlando's Best Wealth Management Firms*

### **Rating Summary**

AndCo believes in building relationships on the foundations of trust, integrity, confidence, and respect. Clients can be assured that their advice is given completely free of any conflicts of interest and in the client's best interest always.

With a broad array of investment management capabilities, a large and experienced team, and a fiduciary commitment, AndCo earns a 5-star rating as one of the best financial advisors in Orlando, FL to consider partnering with this year.

***Don't Miss: [Top Financial Advisors in Iowa \(Des Moines, Ames, Dubuque, and Davenport\)](#)***

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## **Certified Financial Group, Inc. Review**

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Founded in 1976, [Certified Financial Group, Inc.](#) provides peace of mind to families throughout the U.S. and is one of the oldest and largest independent financial management firms in Florida. They are located in Altamonte Springs.

The firm does not state whether they are fee-only or fee-based. We found Certified Financial Group's [ADV](#) listed under Certified Advisory Corp and it mentions that advisors may earn commissions through sales of insurance products or securities, which points to the firm being fee-based.

We recommend you confirm fee structure with any Orlando wealth management firm before contracting their services.

## **Key Factors That Enabled Certified Financial Group, Inc. to Rank as One of the Top Florida Financial Advisors**

### **Comprehensive Financial Services**

For those looking for a full offering of financial planning services, CFG is one of the best Florida financial advisors in the Orlando area. Certified Financial Group provides clients with a comprehensive range of services, which include:

- **Retirement Planning**: Clients work with a CFP® professional to help individuals and couples assess their retirement readiness
- **Financial Planning**: All financial plans begin with a no-obligation consultation and are maintained through ongoing support and expert financial guidance
- **Investment Planning**: Portfolios are designed with distinct financial needs and preferences in mind
- **Social Security Planning**: Smart strategies are utilized to ensure that clients can maximize their Social Security benefits
- **Estate Planning**: Legal assistance for estate planning is offered by [Murphy & Berglund, PLLC](#), an in-office law firm

### **Experienced Team**

All financial planners on the team at Certified Financial Group hold the Certified Financial Planner™ designation and ascribe to a formal code of ethics and continuing education.

With over 300 years of combined industry knowledge, many team members also carry additional financial certifications and designations, which include:

- AIF®—Accredited Investment Fiduciary

- CPA—Certified Public Accountant
- NSSA®—National Social Security Advisor

For clients, the wide array of certifications from these Florida financial advisors guarantees that they are working with an advisor that is knowledgeable keeps up with new industry trends and regulations and adheres to strict fiduciary requirements.

### **Rating Summary**

As one of the top-rated Florida financial advisors in the Orlando area, Certified Financial Group makes a commitment to being client-focused and providing you with expert advice backed by trained professionals.

With a fiduciary pledge, ongoing financial workshops, and a focus on financial education, Certified Financial Group solidifies their 5-star rating as one of the best Florida financial advisors to consider partnering with in 2019.

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## **Moisand Fitzgerald Tamayo, LLC Review**

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[Moisand Fitzgerald Tamayo, LLC](#) works to be a calming presence in their clients' lives and to help them ease any anxiety surrounding their finances. This top-rated Orlando financial planning firm has offices in Orlando and Melbourne, Florida.

The firm is a [fee-only](#) Orlando wealth management firm that helps a select group of families cut through the noise by providing truly objective financial advice enabling confidence and peace of mind.

### **Key Factors That Enabled Moisand Fitzgerald Tamayo, LLC to Rank as a Top Financial Advisor in Orlando, FL**

#### **Client-Centric Value Proposition**

For many clients, an important part of identifying the best financial advisor in Orlando means evaluating the approach to how their personal financial life will be handled.

Moisand Fitzgerald Tamayo makes it simple to evaluate their services by listing the benefits that their previous clients have experienced. By working with this Orlando wealth management firm, clients are:

- **Protected:** A fiduciary commitment ensures that these Florida financial advisors are always working with their client's best interest put first.



- Educated: The firm enables confidence by helping clients understand their financial plan and how it relates to their success.
- Up-to-Date: The team of Orlando financial advisors is continuously learning about industry trends, changes, and new approaches.
- Efficient: Moisand Fitzgerald Tamayo prides itself on possessing the skills, knowledge, and determination to tackle a vast array of client needs.
- Organized: Your financial advisor in Orlando, FL will help you stay organized and keep your financial affairs in order.
- Confident: Sound planning and preparation is key to making good financial decisions through an ever-evolving future.



*Top Financial Planning Firms in Orlando, Florida*

### **Straightforward Service Offerings**

In keeping with the firm's mission to cut through the noise of complicated financial topics, Moisand Fitzgerald Tamayo keeps their service offerings as straightforward and comprehensive as possible.

Not only does this exemplify the firm's mission, but it also makes wealth management much more approachable, as all services are easy to understand without complicated financial jargon being employed.

These service offerings include:

- Specific Tax Planning: The firm has three IRS Enrolled Agents to assist clients with taxes and tax efficient strategies.
- Real Financial Planning: Holistic planning that considers all aspects of a client's financial life.
- Objective Implementation: Proactively seeking and suggesting the best investment strategies and choices.
- Ongoing and Proactive Monitoring: Full transparency, open communication, and continual monitoring of client accounts.

### **Rating Summary**

Moisand Fitzgerald Tamayo has a mission to be a calming influence in their clients' lives and to uncomplicate the world of wealth management and financial planning. This makes them an excellent Orlando financial advisor for those new to investing.

With a refreshing approachability, a fee-only structure, and a client-centered approach, Moisand Fitzgerald Tamayo earns a 5-star rating and is one of the top financial advisors to consider partnering with this year.

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## **Nelson Financial Planning Review**

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With an investment philosophy grounded in diversification and consistency, [Nelson Financial Planning](#) is a financial advisor in Winter Park, Florida with over 30 years of experience in investment and retirement planning.

The firm offers a variety of client services with both [fee-only and fee-based](#) options and upholds a fiduciary commitment to always put their client's best interest first. It's a good idea to be clear about which fee structure is matched with the service you're requesting.

### **Key Factors That Enabled Nelson Financial Planning to Rank as One of the Top Financial Advisors in Winter Park, FL**

#### **Holistic Financial and Retirement Planning**

Nelson Financial Planning offers a comprehensive, client-focused approach to financial planning. They believe that any good financial strategy should be laser-targeted to a client's goals and dreams for the best chance of success.



The goal of this Winter Park wealth management firm is to make sure that every client has the information and guidance they need to feel comfortable making decisions about their financial planning.

This Florida financial advisory firm offers financial advice in the following areas:

- Retirement Income: Putting clients in a position where they can live comfortably throughout retirement
- Retirement Planning: Helping clients make the best planning and investing decisions today so that they can be secure tomorrow
- Investments: Assistance with selecting solid investments that are aligned with a client's goals and objectives
- Taxes: Expert guidance through the complex tax system and advice minimizing one's tax burden
- Florida Retirement System: Discuss the benefits of enrolling in this system, how it affects your retirement options, and how to easily enroll if one chooses to

### **“Dollars and Sense” Radio Show**

As one of the top financial advisors in Winter Park and Orlando, FL, Nelson Financial Planning produces a radio show on a number of helpful financial topics.

Called Dollars and Sense, it is the longest running radio show in Central Florida with more than 1,400 episodes.

Listeners can call in with their financial questions, while the Orlando financial advisors at Nelson Financial Planning cover topics like retirement income, investments, retirement planning, taxes, Social Security, mortgages, saving for college, and more.

### **Rating Summary**

For those looking for expert guidance for their retirement years, Nelson Financial Planning offers clients with a range of comprehensive and valuable retirement services to help secure a comfortable future.

With fee structure options, a fiduciary commitment, and expertise in the Florida retirement system, Nelson Financial Planning solidifies a 5-star rating as one of the top financial advisory firms in the Orlando area to consider partnering with this year.

***Popular Article: [Top Financial Advisors in Cincinnati, Ohio](#)***

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# Resource Consulting Group Review

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Taking an academic approach to investing, [Resource Consulting Group](#) is an independent, Orlando-based wealth management firm that's been serving clients who represent the top 1% in terms of assets and income since 1988.

The firm is a fiduciary, [fee-only](#) Orlando financial advisor that believes in taking a balanced and well-strategized approach to investment management.

## Key Factors That Enabled Resource Consulting Group to Rank as a Top Financial Advisor in Orlando

### The Seven Investment Fundamentals

To maximize the probability of your future financial goals being reached, Resource Consulting has taken the most relevant investment objectives and created [The Seven Investment Fundamentals](#) to help clients avoid the dangers of the market. These include:

- Appropriate allocation to equities: Properly allocated assets are the strongest determinant of yielding high returns over the long term. In simple terms, don't put all your eggs in one basket.
- Stay fully invested: Timing your investments properly is key. Market timing adds uncertainty and lowers efficiency, both of which should be avoided.
- Keep costs down: Resource Consulting believes that the annual portfolio cost should be no more than 1 percent.
- Use only short-term bonds: Short-term bonds offer less risk. Exposure to risk from long-term bonds only offers a minimal return.
- Include small cap stocks: It's been shown that over time, small cap stocks garner higher returns than large cap stocks.
- Include value stocks: Value stocks produce higher returns and allow for significant growth achievement.
- Have broad diversification: No one investment strategy works all of the time. Risk is reduced through the use of asset diversification.

### Retirement Planning Services

Resource Consulting offers comprehensive and transparent retirement planning for individuals and employees based upon the following principles:

- **Simplicity**: Leave the complicated jargon at the door; retirement planning should be as simple and straightforward as possible.
- **Plan Wellness**: Increasing employee participation and encouraging employees to adequately fund their retirements set them up for a steady income during retirement years.
- **Fiduciary Assistance**: Resource Consulting can serve as your plan's ERISA, and it is the first firm in Florida to hold the CEFEX certification for fiduciary excellence.
- **Investment Strategies**: Tailored investment portfolios allow practical investing and the application of solid research.
- **Transparency of Fees**: As a fee-only firm, partnering with the Orlando financial advisors at Resource Consulting Group means having complete transparency at all times.
- **Broad Resources**: The Resource Consulting team is highly accredited and includes CPAs, MBAs, and CFPs.

### **Rating Summary**

Resource Consulting Group is a top financial advisory firm in Orlando that works to simplify the process of wealth management and retirement planning so clients can reach financial goals with confidence.

With a well-defined investment strategy that reduces risks and maximizes gains and a fee-only fiduciary commitment, Resource Consulting Group solidifies their 5-star rating as one of the best financial advisory firms in Orlando to consider working with this year.

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## **Ronald Blue Trust Review**

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[Ronald Blue Trust](#) was founded in 1979 with a vision of taking a faith-based approach to financial planning and wealth stewardship. They have 14 offices throughout the U.S., including one in Orlando, FL, and serve clients in all 50 states.

The firm is a [fee-only](#) Orlando wealth manager that believes using biblical principals can help clients clarify their decision-making and focus on leaving a legacy of financial, social, and spiritual capital.


## **Key Factors That Enabled Ronald Blue Trust to Rank as One of the Top Financial Advisors in Orlando, FL**

### **Client Divisions**

To serve the varied needs of their client base, Ronald Blue Trust maintains four distinct divisions, each tailored to cater to the unique financial needs of the group. These divisions include:

- Private Wealth: Comprehensive financial planning services to clients with an approximate net worth of \$1 million
- Family Office: Focused on the complex financial needs of multi-generational families
- Professional Athlete: Expert strategies to build and maintain wealth during a shorter than typical career span
- Everyday Steward®: Financial planning strategies for those just getting started with wealth management

These divisions not only enable the Orlando financial advisors at Ronald Blue Trust to reach a broad range of clients, but they also lend a competitive edge to the firm, by offering specialized services that many financial advisors in Orlando may miss.



Wisdom  
for Wealth.  
*For Life.*

## *Top Financial Planning Firms in Orlando, FL*

### **Faith-Based Approach**

Rather than focusing on how much money can be made, the guiding vision behind Ronald Blue Trust is to instill their clients with an enriched life.

For these Orlando wealth managers, enrichment can be attained by infusing financial planning and investment management with biblical principles, offering a more value-based experience.

By providing a space where faith and finances can intersect, Ronald Blue Trust gives their clients a unique value and take on financial health, allowing clients to align their financial principles with the principles of their faith.

### **Rating Summary**

Ronald Blue Trust offers a completely different approach to wealth management than you'll find at most other top-rated Orlando financial planning firms, with a focus on faith-based values and how they relate to managing money.

Their distinct client divisions, ability to cater to all wealth levels, and an approach that goes deeper than most, Ronald Blue Trust earns a 5-star rating as one of the top financial advisors in Orlando, FL to consider partnering with in 2019.

***Read More: [Best Financial Advisors in Pittsburgh, Pennsylvania](#)***

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## **WaterOak Advisors Review**

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With an experienced and educated team, [WaterOak Advisors](#) provides personalized wealth management and financial planning services to high-net-worth clients from their Winter Park, Florida office.

They are a [fee-only](#) wealth management firm in the Orlando area that is 100% employee owned and is dedicated to providing expert and objective financial guidance.

### **Key Factors That Enabled WaterOak Advisors to Rank as One of the Top Financial Advisors in Winter Park, FL**

#### **Comprehensive Financial Services**

One thing that makes WaterOak Advisors stand out as a top financial advisor in Winter Park, FL is their commitment to ensuring that each client's money is simultaneously growing and being preserved.

Financial planning services from this wealth management firm in Florida revolves around three essential areas: goals planning, tax planning, and estate planning.

Wealth management clients can benefit from strategies that other financial advisors often overlook, like:

- Economies of Scale: Benefit from exclusive pricing based on WaterOak's buying power
- Advanced Reporting: Tailored performance reporting and access to client portal
- Tax Alpha: Advanced strategies for tax management and efficiency
- Retirement Planning: Advanced spending and distribution strategies to ensure a comfortable retirement

### **Diverse Portfolio Construction**

Diversification helps reduce risk and improve gains. Rather than rely on traditional portfolio construction, portfolios from WaterOak Advisors utilize global stocks, global bonds, and non-correlating alternatives to significantly enhance returns.

This unique approach allows individual investors to take advantage of portfolio strategies previously only available to institutional investors, leveling the playing field and adding significant investment value.

### **Rating Summary**

WaterOak Advisors has over two decades of experience providing value to their clients through smart and dynamic investment strategies.

With a commitment to low client-to-advisor ratios, custom tailored solutions, and a mission to help their clients' succeed, WaterOak Advisors scores a 5-star rating as one of the best financial advisors in the Orlando area to consider partnering with this year.

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## **FirsTrust Review**

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[FirsTrust](#) makes a strong commitment to clients to be truly objective and become an advocate for their successful financial future. This Orlando financial advisor has five offices throughout Florida and one in Atlanta, GA.

The firm is a [fee-only](#) wealth management firm in Orlando that offers expert financial, tax, retirement, estate, and investment services.

## **Key Factors That Enabled FirsTrust to Rank as a Top Financial Advisor in Orlando, FL**

### **Retirement Planning**

Retirement planning is an important part of nearly everyone's future financial plan. As such, this wealth management firm in Florida impresses upon its clients that successful retirement planning is about more than just waiting for savings to grow.

According to FirsTrust, effective retirement planning requires an understanding of financial variables, like taxes and income needs in retirement to live comfortably.

This Orlando financial advisory firm assists clients with the following specifics to help them plan for a successful retirement:

- Creating a tax-efficient retirement strategy
- Setting a monthly budget to manage spending
- Using online resources to monitor accounts and track progress
- Understand the potential impact you may have on yourself, your family, and your legacy

### **Estate Planning**

In the same way that effective retirement planning is about more than just savings, estate planning is about more than just writing a will and locking it away and includes many factors to ensure your estate is maximized in a way that carries out your wishes.

This Orlando wealth management firm can help you do the following:

- Avoid financial conflicts within the family
- Protect heirs from spendthrift concerns
- Mitigate federal estate taxes
- Provide financial management in the event of disability
- Retain and protect family heirlooms
- Avoid postmortem legal proceedings
- Protect and/or dispose of business interests
- Ensure spouses are financially comfortable
- Guarantee funding of future college educations





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

#### **Rating Summary**

For individuals looking for a firm that upholds high standards, FirsTrust is an excellent choice, adopting “7 Truths” related to serving in your best interest that include factors such as objectivity, customization, transparency, and advocacy.

While FirsTrust advisors have a wide range of experience and financial knowledge, their website is somewhat cluttered and difficult to read when compared to other Orlando financial advisors. This can make it challenging for potential clients to fully evaluate their services, thus we’ve scored them a 3-star rating.

By updating their website to a more user-friendly format, FirsTrust could easily improve both their value proposition to new clients and their rating as a top financial advisor in Orlando, FL.

***Related: [Best Financial Advisors in Miami and Coral Gables, Florida](#)***

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# Signature Wealth Advisors Review

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Believing in the genius of “and” when integrating financial services, [Signature Wealth Advisors](#) is a top Orlando wealth management firm that works to simplify the process of financial planning.

The firm’s website doesn’t specifically state whether it’s fee-based or fee-only, however in their description of how [advisors are compensated](#), they note that commissions are paid on purchase and sale of stock. This would point to the firm being fee-based.

As always, we recommend you confirm a firm’s fee structure before purchasing their services.

## **Key Factors That Enabled Signature Wealth Advisors to Rank as One of the Top Financial Advisors in Orlando, FL**

### **Comprehensive Four-Step Process**

Signature Wealth Advisors works to make financial management easy and helps cut through the complexities that can sometimes accompany the process.

These financial advisors in Orlando take a comprehensive approach at the same time as ensuring their strategies are on course with your goals by going through four steps:

- **Analyze:** Prior to any product or service recommendations being made, they work to gain a full understanding of your financial dreams and objectives.
- **Recommend:** These Orlando financial planners offer suggestions based upon strategies that are matched to your distinct needs.
- **Implement:** Once a plan is agreed upon, these wealth managers in Orlando will put the strategies into action to help ensure your financial freedom.
- **Review:** Financial situations often change through time, so your advisors will stay on top of your portfolio with periodic reviews and adjustments as needed.

### **Financial Insights**

You can tell a top-rated financial advisor by their commitment to client education and the resources it provides. Signature Wealth Advisors offers a wide range of educational information to help clients and non-clients alike gain a better understanding of many facets of financial management.

Videos, presentations, and articles can be found on their website on several topics that will help investors gain more insight and a better understanding of areas such as retirement, estate planning, and investments.

Here are just a few of the topics that this top-rated Orlando wealth management firm offers in their robust educational materials:

- “9 Facts About Retirement”
- “Estate Management Checklist”
- “The Junk Drawer Approach to Investing”
- “A Bucket Plan to Go with Your Bucket List”
- “Estimating the Cost of College”

### **Rating Summary**

Signature has a well-credentialed and experienced team of advisors all working together to help you succeed in every step of your financial journey. Their comprehensive approach helps make the financial planning process as straightforward as possible.

While they offer a wealth of financial educational materials on their website, we found that details on the specific services they provide to clients was lacking, which could make it more difficult for potential clients to fully evaluate the firm. For this reason, coupled with lack of a clear fee structure, we’ve rated them with 3-stars.

By adding more detailed information about the financial services they provide and clarifying whether they are fee-only or fee-based, Signature Wealth advisors could easily improve both their value proposition to new clients and their rating as a top financial advisor in Orlando, FL.

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## **Conclusion – 2019 Top Financial Advisors in Orlando, Florida**

These top 11 wealth management firms in the Orlando area have a lot of experience and knowledge to offer clients looking for help with retirement planning, family estate services, or taxes, insurance or any number of other financial services.

Now that you’ve seen the best of the best in Orlando, your next step would be to narrow down your options to a few that you’d like to learn more about and are potential contenders to work with.

Many Orlando financial advisory firms offer complimentary initial consultations where you can both gain some insight into your financial picture and learn more about the firm and how you feel about working with them.

To get the most out of an initial meeting, it's a good plan to bring all your financial information on income, expenses, investments, and the like along with you so you'll have everything they need to evaluate your situation.

Then once you've found your perfect match among the best financial planning firms in Orlando, they take over the heavy lifting and help create a strategy to ensure your goals are met and your financial future is a bright one.

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## Rate Table Disclaimer

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