
Top 11 Best Financial Advisors in Miami & Coral Gables, Florida | 2019 Ranking

2019 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN MIAMI

Rating 2019's Best Financial Advisors in Coral Gables and Miami, Florida

Miami and Coral Gables, Florida are both located in Miami-Dade County, which is the most populous in the state. Besides being known for its vibrant night-life, Miami is also considered the economic and financial center of South Florida.

Which means the area is home to a number of top-rated financial advisors that can help you get a handle on your finances and get your money working to fuel your future dreams.

From retirement planning to funding a new business, the best wealth management firms in Miami and Coral Gables can provide the financial expertise that puts you ahead and sets you up for a successful future. However, finding the one that fits you like a glove can take some time.

How do you know which traits to look for when searching for a top Miami financial planner? Should you look for a firm that's a fiduciary, or does that matter?

AdvisoryHQ makes the search for one of the best financial advisors in Coral Gables or Miami, Florida easier by doing the initial legwork for you. We review firms throughout the area and rate them according to traits like fee structure, transparency, and the types of services they provide.

The result is that you get a "hot list" of the top 11 Miami area wealth management firms from which to begin your own search, along with some knowledge on terms like "fiduciary," "fee-based," and "fee-only."

If you're looking to get ahead financially with an expert to guide you, read on for the best financial firms in Miami and Coral Gables that can help you achieve a more secure future.



Award Emblem: Top 11 Best Financial Advisors in Miami and Coral Gables, Florida

Top 11 Best Financial Advisors in Miami & Coral Gables, Florida | Brief Comparison & Ranking

Best Financial Advisors in Miami & Coral Gables	2019 Ratings
BigSur Partners	5
Cathy Pareto & Associates, Inc.	5
Evensky & Katz/Foldes Financial	5
GenTrust, LLC	5
Investor Solutions, Inc.	5
MAXIMAI Investment Partners	5
Pinnacle Advisory Group, Inc.	5
Singer Xenos	5
WE Family Offices, LLC	5
Dimension Capital Management	3
Firestone Capital Management	3

Table: Top 11 Best Wealth Management Firms in Miami & Coral Gables | Above list is sorted by rating

Financial Planners in Miami Terms to Know: Fee-Only, Fee-Based, Fiduciary

There are three important terms to know when you're looking for a top-rated financial planner in Coral Gables or Miami to work with. These terms relate to the type of fee structure a financial advisor uses and how they treat their advisor-client relationship.

Here's an overview of these three terms so you'll know what to look for as you read down the list of top Miami wealth management firms.

“Fee-Only”

When an investment firm or a financial advisor states that they are "[fee-only](#)," this means that their compensation comes **ONLY** from client fees, and they do not accept any commissions or incentives from sales of 3rd party financial products.

A fee-only financial planner in Miami or Coral Gables is in a better position to act solely in the best interest of their clients because there are no outside influences when it comes to giving financial recommendations.

“Fee-Based”

A Miami or Coral Gables wealth management firm that is "[fee-based](#)" is letting you know that they do accept third party commissions or incentives, such as referral fees, from sales or recommendations of financial products.

This structure has an inherent conflict of interest with the client's best interests, which is why many fee-based firms will help counteract that by becoming fiduciaries.

“Fiduciary”

Both fee-only and fee-based firms can be fiduciaries. A [fiduciary](#) takes on a legal obligation to be completely transparent with clients about their compensation and to put their clients' best interests ahead of their own.

Working with a firm that takes on a fiduciary obligation to their clients offers peace of mind that no matter whether they're fee-based or fee-only, they are giving advice that's in your best interest.



Top-Rated 2019 Miami & Coral Gables, FL Financial Advisors

2019 AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services and products that are ranked on its various top-rated lists?

Please click here “[AdvisoryHQ's Ranking Methodologies](#)” for a detailed review of AdvisoryHQ's selection methodologies for ranking top-rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Best Wealth Management Firms in Miami & Coral Gables

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

- [BigSur Partners](#)
- [Cathy Pareto & Associates Inc.](#)
- [Evensky & Katz/Foldes Financial](#)
- [GenTrust, LLC](#)
- [Investor Solutions, Inc.](#)
- [MAXIMAI Investment Partners](#)
- [Pinnacle Advisory Group, Inc.](#)
- [Singer Xenos](#)
- [WE Family Offices LLC](#)
- [Dimension Capital Management](#)
- [Firestone Capital Management](#)

Click below for previous years' rankings:

- **2018 Review: Top 11 Best Financial Advisors in Miami & Coral Gables, Florida**
- **2017 Review: Top 9 Best Financial Advisors in Miami & Coral Gables**
- **2016 Review: Top 10 Best Financial Advisors in Miami & Coral Gables**

BigSur Partners Review

Offering a “single-family office experience” through a multi-family office, [BigSur Partners](#) is a top-rated financial advisor in Miami that purposely limits their number of clients so they can provide fully personalized care.

The firm is a [fee-based](#), independent wealth manager in Miami that was founded in 2007 and serves clients around the world.

We’ve chosen them due to their client-first commitment, wide range of services, and personalized attention.

Key Factors That Enabled BigSur Partners to Rank as a Top Wealth Management Firm in Miami

Financial Services

BigSur Partners separates their wide array of services into four tiers:

- Investment Advisory: Based on a philosophy of finding intrinsic value across global markets and asset classes, clients receive a holistic, total balance sheet of all their assets.
- Private Investment Platform: Access to privileged investments within real estate, private equity, private debt, and venture capital asset classes.
- Institutional Custody & Execution: Features efficient portfolio management and substantially lower fees from superior investment strategies and oversight of fewer securities
- Other Services: The Miami financial advisors at BigSur can coordinate with a range of other financial professionals, assist with the management and reporting of collectibles, as well as handle other types of personal requests.



Best Wealth Management Firms in Miami, FL

Boutique Approach

Those looking for a boutique experience will enjoy BigSur's business model which stands apart due to:

- Independence in operations

- Customization of advice and services
- Transparency in client dealings
- Access to globally minded products and services
- Consistent monitoring and communication

Due to the selective nature of its services, this Miami wealth management firm purposely restricts the type and nature of clients that it serves so each client receives nothing less than exemplary attention.

As a sought-after financial advisor in Miami for a niche clientele, the firm's strategic and selective process has allowed its advisors to deliver client-centric service, resulting in a more focused, customized client experience.

Rating Summary

For ultra-and high-net-worth clients looking for multi-generational family office services, BigSur is an excellent option that works to build deep and long-lasting relationships.

With a hands-on approach, and a philosophy designed to find intrinsic value across global markets to protect and grow their clients' wealth BigSur Partners scores a 5-star rating as one of the top Miami financial advisors to consider working with this year.

See Also: [Top Financial Advisors in Boston, Massachusetts](#)

Cathy Pareto & Associates Inc. Review

[Cathy Pareto & Associates Inc.](#) is run by a team that truly cares about their client's financial needs and future goals. This top wealth management firm in Coral Gables, Florida was founded in 2008.

The firm is a [fee-only](#) independent investment manager and financial planner that works with clients throughout Florida, the U.S., and other countries.

Key Factors That Enabled Cathy Pareto & Associates to Rank as a Top Miami Financial Advisor

Focused Financial Planning

With financial planning services, this wealth management firm in the Miami area can help you turn your dreams into reality by developing a step-by-step process of how to structure your spending, savings, and investing.

The Coral Gable financial advisors at Cathy Pareto will take you through a detailed process that helps you answer questions related to saving for retirement, retiring early, your risk tolerance, your current investments, and more.

The team of advisors at this Miami area wealth management firm can also help manage more than one goal at a time without sacrificing one for another, such as saving for your child's education and having the ability to retire early.

Financial Planning for Women

A feature that makes Cathy Pareto & Associates stand about as a dynamic Coral Gables/Miami financial planner is the firm's commitment to providing financial services designed specifically for women.

Some of the unique financial challenges that women face, and which impact their finances include:

- Longer life spans
- Shorter and interrupted careers
- Earnings disparity
- Financial literacy
- Retirement systems that penalize women for temporary leaves of absence from the workforce
- High divorce rates and high probability of widowhood

As a top financial advisor in Miami, Cathy Pareto & Associates works with women clients to create actionable financial plans, improving financial health over the long-term.

Rating Summary

Cathy Pareto & Associates offers expert and comprehensive financial planning services through many different stages of life. This expert Coral Gables financial advisor provides much more than just investment recommendations, they assist with a large number of financial needs.

With a specialty focus on the financial needs of women, physicians/dentists, small business owners, retirees, and modern families Cathy Pareto & Associates solidifies their 5-star rating as one of the top Coral Gables and Miami wealth management firms to consider working with in 2019.

Evensky & Katz/Foldes Financial Review

[Evensky & Katz/Foldes Financial](#) is one of the largest independent Registered Investment Advisory firms in South Florida. They serve executives/professionals, retirees, entrepreneurs, young accumulators, institutional clients, and more from offices in Coral Gables, FL and Lubbock, TX.

The firm is a [fee-only](#), fiduciary Miami area wealth management firm with a staff of 29 that has been serving clients for over three decades.

Key Factors that Enabled Evensky & Katz/Foldes Financial to be Ranked as a Top Miami Financial Advisor

Financial Planning-Based Investment Management

This Miami wealth management firm helps clients grow their money and build a strong foundation with which to achieve their financial objectives.

No matter what your goals may be, investing is easier when you have a clear idea of your goal line. As a result, these advisors provide financial planning-based investment management, also known as wealth management services.

These financial advisors in Miami begin by taking the time to get to know you through a detailed conversation, developing an investment policy statement to reflect your personal needs. This statement serves as the document of reference when it comes to strategizing what you are working towards, acting as a financial roadmap.

During the process, these Miami financial advisors also take important factors into consideration, like various investment options, taxation, costs, risks, and more.

Qualified Retirement Plans

Along with individual investment advice, this wealth management firm in Miami offers financial advisory services for institutional retirement plans, specializing in 401(k) plans, SEP plans, and profit-sharing trusts.

Their institutional approach is similar to an individual approach in the sense that they help firms identify specific investments and provide a number of investment models for qualified retirement plan participants to choose from.

Additionally, the firm also provides written acknowledgement of their role as an ERISA fiduciary, fostering trust between advisors and their institutional clients.



Top Financial Planners in Miami & Coral Gables, Florida

Rating Summary

Evensky & Katz/Foldes Financial has a highly qualified and dedicated team of Florida financial advisors that hold multiple industry certifications, like CFP®, CFA, AIF®, ADPA®, and more. So, clients know they're working with a team that can give them a distinct advantage.

With a collaborative process, a fee-only structure, and a wide range of services, Evensky & Katz/Foldes Financial earns a 5-star rating as one of the best financial advisors in Miami to consider partnering with this year.

GenTrust, LLC Review

With differentiated solutions unique to their firm, [GenTrust, LLC](#) is an SEC-registered investment advisory firm in Miami and New York City that offers a full range of wealth and asset management services.

The firm is a [fee-based](#) Miami financial advisor that also upholds a fiduciary commitment to always act in the best interests of their clients. They pride themselves on a dynamic and experienced team that adapts easily to change.

Key Factors That Enabled GenTrust, LLC to Rank as a Top Wealth Management Firm in Miami

Registered Investment Advisory

As an independent Registered Investment Adviser (RIA), GenTrust is held accountable to a much higher fiduciary standard than non-RIAs.

The fiduciary standard dictates that all advice and recommendations made by GenTrust's Miami financial advisors must be in a client's best interest, with zero hidden agendas or conflicts of interest.

This is a crucial component for any Miami financial advisor, but particularly for those that use a fee-based model, as the fiduciary standard effectively eliminates the native conflicts of interest that are often associated with firms that accept commissions on financial products.

Services for Sports & Entertainment Professionals

A unique specialty of GenTrust is offering financial planning services that are catered to fit the complex needs of clients within the sports and entertainment industries.

These industries often involve short-term accumulation of large amounts of wealth, and the Miami financial advisors at GenTrust can effectively help clients preserve that wealth through expert asset allocation, risk management, and financial planning.

Some highlights of these specialized services include:

- Long-term financial planning for retirement and future generations
- Family Office and Concierge Services
- Individual attention and discretion
- Decades of proven experience
- Holistic management of personal financial affairs

Rating Summary

For clients looking for a deep bench and broad range of wealth management services, GenTrust offers an excellent option. This Miami financial planning firm helps clients maintain a certain lifestyle and plan for retirement and other future goals with robust financial plans.

With a strong client commitment, a unique specialty in entertainment and sports, and use of web-based AI software, GenTrust solidifies a 5-star rating as one of the top Miami wealth management firms to consider partnering with in 2019.

Investor Solutions, Inc. Review

Since 1993, [Investor Solutions, Inc.](#) has been helping clients achieve their dreams using the principals of professionalism, service, and integrity. They are a top-rated wealth management firm in Miami Florida.

This [fee-only](#) registered investment advisor also upholds a fiduciary standard to act in their clients' best interests. They provide a wide array of financial services to individuals and families, pre-retirees and retirees, retirement plan sponsors, and endowments for not-for-profits.

Key Factors That Enabled Investor Solutions, Inc. to Rank as a Top Financial Advisor in Miami, FL

Highly Qualified & Experienced Team

This highly-qualified team of Miami financial advisors offer the benefit of a wide range of industry-recognized credentials. These include:

- CFP®—Certified Financial Planner
- AIFA®—Accredited Investment Fiduciary Analyst
- CFA®—Chartered Financial Analyst
- CIMA®—Certified Investment Management Analyst
- CPWA®—Certified Private Wealth Advisor
- CRPS®—Chartered Retirement Plan Specialist
- CPPT®—Certified Public Pension Trustee
- CPA—Certified Public Accountant

Many of these credentials come with strict requirements for following the fiduciary standard and ongoing education, illustrating the firm's ongoing commitment to excellence.

Additionally, the team brings decades of industry experience to the table at each client interaction, giving clients the peace of mind that these financial planners in Miami can expertly handle a variety of financial challenges.



Best Financial Advisors in Miami 2019

Focus on Investments

As a top-rated Miami wealth management firm, Investor Solutions offers clients an in-depth, comprehensive approach to portfolio design.

After carefully selecting assets based on risk tolerance, goals, and time horizon, each customized portfolio created by Investor Solutions includes:

- Periodic rebalancing
- Tax loss harvesting
- Dividend and capital gain avoidance
- Asset location strategies
- Continuous review
- Regular reporting and reviews
- A team of two professional advisors for oversight

Rating Summary

For those investors looking for a well-credentialed team to work with, Investor Solutions boasts one of the most accredited teams among top Miami financial advisors. This means you'll have decades of experience backing up any financial recommendations.

With a strategic approach to investing, a range of books written by CEO/Founder Frank Armstrong, and a pledge to put clients first always, Investor Solutions scores a 5-star rating as one of the best Miami wealth management firms to consider partnering with this year.

MAXIMAI Investment Partners Review

With a family first philosophy, [MAXIMAI Investment Partners](#) is an independent, boutique wealth management firm in Coral Gables, Florida that provides personalized concierge service.

The firm is a [fee-only](#) financial advisor in the Miami area that specializes in the complex financial needs of ultra-high-net-worth individuals, entrepreneurs, and families. They cater to a small, distinct group of clients, which allows time for customized services.

Key Factors That Enabled MAXIMAI Investment Partners to Rank as One of the Best Financial Advisors in Miami, FL

Independent, Fee-Only Structure

As a fee-only wealth manager in Coral Gables, the firm only receives compensation from the clients it advises, so there are no conflicts of interest and all advice is completely objective.

With a fee-only structure, clients can trust that they will receive guidance that is truly unbiased and customized, as the firm's interests are always aligned with those of their clients.

Additionally, as a Registered Investment Adviser, MAXIMAI is held to the fiduciary standard of care, creating an ethical and legal requirement to always act in the best interests of their clients.

With the combination of a fee-only structure and a fiduciary commitment, MAXIMAI exemplifies the ideal relationship with a Miami financial advisor, as client-advisor relationships are held to the highest standards of transparency and trust.

Strong Value Proposition

Clients searching for a top financial advisor in Miami that offers completely personalized service, will appreciate the attention and range of services that MAXIMAI offers, which include:

- Boutique approach with concierge services
- Multicultural and multigenerational team
- Proactive communication and consistent interaction
- Extensive professional network

- Tailored platform
- Educational mentoring for clients and their families
- Independent, open-architecture platform provides unrestricted access to investment managers and funds

Additionally, as a truly multicultural firm, clients with global interests and investments can trust that MAXIMAI will offer insights on evolving markets and regulations on a grander scale, including domestic and international estate and trust planning.

Rating Summary

Although MAXIMAI Investment Partners was founded in 2016, the team of Miami financial advisors behind the firm came together more than two decades ago and offer a wealth of expert financial industry experience. They are an excellent option for ultra-high-net-worth investors looking for a proactive and hands-on approach.

With a boutique experience, purposely limited client base, and customized concierge approach, MAXIMAI solidifies their 5-star rating as one of the top wealth management firms in Coral Gables or Miami to consider partnering with this year.

Pinnacle Advisory Group, Inc. Review

[Pinnacle Advisory Group, Inc.](#) is a top-rated financial advisory firm in Miami that serves as their clients' personal Chief Financial Officer. They have offices in Miami and Naples, Florida and Columbia, Maryland.

The firm is a [fee-based](#), Miami wealth manager that has a minimum investable asset level for clients of \$500,000.

We've included them on our top list due to their fiduciary commitment and pledge to not sell insurance, mutual funds or other commissions-based products and to strive to be free of any conflicts of interest.

Key Factors That Enabled Pinnacle Advisory Group, Inc. to Rank as One of the Best Financial Advisors in Miami, FL

Comprehensive Approach to Financial Planning

To be truly effective, financial planning should include a broad range of services and goals covering both short-term and long-term financial objectives.

As a top Miami financial advisor, Pinnacle offers clients access to multiple financial planning topics and strategies, including (but not limited to):

- Retirement planning
- Tax planning
- Education planning
- Charitable giving
- Small business planning and exit strategies
- Estate planning
- Insurance planning



Miami's Top-Rated Financial Advisors

Onpoint by Pinnacle

Preparing to have enough income to last throughout retirement is a key facet of any successful retirement planning endeavor. The Miami financial advisors at Pinnacle take this one step further through Onpoint by Pinnacle, an initiative which revolves around distribution planning.

Onpoint by Pinnacle focuses on creating a strategy to turn assets into spendable cash-flow that will replace a steady paycheck and fund living expenses after you stop working. This ensuring that:

- You won't outlive your assets during retirement
- You won't spend too little and miss out on the benefits of saving
- Your investable assets will be optimized to create steady cash flow

Rating Summary

Pinnacle Advisory Group offers a full range of financial and investment services backed by a client-first philosophy and environment of trust and transparency. Additionally, they offer a wide range of financial educational materials to aid financial literacy.

With cutting edge approaches, a dynamic and expert team, and comprehensive strategy, Pinnacle Advisory Group earns a 5-star rating as one of the top Miami financial advisors to consider partnering with this year.

Read More: [Best Financial Advisors in San Francisco, Oakland, Corte Madera, CA](#)

Singer Xenos Review

For over 30 years, [Singer Xenos](#) has been providing expert wealth management services to individuals and families throughout South Florida, Latin America, and Europe. The firm is based in Coral Gables, Florida.

Singer Xenos is a [fee-only](#) Florida financial advisor that is one of the largest independent firms in South Florida. They are also consistently recognized as a Top Financial Advisor by Financial Times and were recognized as a Top 25 Women-Owned RIAs by WealthManagement.com.

Key Factors That Enabled Singer Xenos to Rank as a Top Financial Advisor in Miami, FL

Unbiased, Unified Approach

Singer Xenos practices a deep commitment to offering robust and expert services for their clients, giving them a valuable long-term foundation for financial planning and wealth management.

This commitment can be seen in their fee-only pricing structure. Clients working with this fee-only Miami area financial advisor, can rest assured knowing that all advice is given without bias, hidden costs, or incentives for personal gain.

Additionally, all advisors are Certified Financial Planners, and their expertise is diversified into multiple industry sectors like tax planning, estate planning, business succession, charitable giving, and more.

Women's Financial Services Division

This South Florida wealth management firm addresses the distinct financial needs of women, helping their clients plan for circumstances and scenarios like early widowhood and longer lifespan.

The Miami financial advisors at Singer Xenos can give support before, during, or after a major life change. Working with a professional at Singer Xenos can provide a firm financial foundation when other facets of life are in turmoil, such as after a divorce.

Singer Xenos also offers a learning and networking opportunity called [SX Women's Group](#). It's a personalized client experience that helps Singer Xenos stand out from other financial management firms in South Florida.

Rating Summary

SingerXenos takes pride in being one of the most innovative financial advisory firms in Coral Gables and Miami. In addition to specializing in women's financial needs, they also offer specialized services for Next Gen Wealth, entrepreneurs, and foreign professionals.

With a dedication to growing and preserving wealth for their clients, and a service offering unmatched privacy and personalization, Singer Xenos one of the best financial advisors in Miami and Coral Gables to consider working with this year and earns a 5-star rating.

WE Family Offices LLC Review

With a very low client to employee ratio of 1:1.5, [WE Family Offices LLC](#) is committed to advocating for their client families and ensuring their long-term interests are well managed. They've worked with some of the world's wealthiest families for decades.

The firm is a [fee-only](#), independent Miami wealth management firm that has an additional office in New York City and offers a broad range of customized family office services.

Key Factors That Enabled WE Family Offices LLC to Rank as a Top Financial Advisor in Miami, FL

Building a Wealth Enterprise

For many wealthy families, one of the greatest fears is seeing their fortune dwindle over time due to being mismanaged or not managed effectively. To sustain wealth over multiple generations, WE Family Offices assists clients in creating their own wealth enterprise.

In essence, this means approaching the management of family wealth as a business, beginning with financial statements, a mission statement, and clear financial roles and responsibilities within the family.

To support their ultra-high-net-worth (UHNW) families in becoming a successful wealth enterprise, this top-rated financial advisor in Miami plays three key roles:

- Serve as an outsourced family office
- Serve as an extension of an existing Single Family Office
- Conduct special projects and diagnostics for UHNW families

Three Areas of Focus

Families that fit into the ultra-high-net-worth category are apt to have unique and complex financial needs when it comes to holistic wealth management.

As such, WE Family Offices separates their financial expertise into three main areas of your financial life:

- Wealth Ownership & Purpose: Addresses overall strategy, mission, purpose, values, how to make decisions, plans for succession, and more
- Wealth Resources & Structures: Examines existing network of providers, estate planning structures, investment objectives, and more
- Wealth Management: Analyzes performance, overall net worth, asset allocation, wealth management cost, risk management tools, and more

No matter what service a family may need, WE Family Offices maintains a personal, in-depth, and customer-centric approach to Miami wealth management.



Best Wealth Management Firms in Miami & Coral Gables, FL

Rating Summary

Affluent families looking for a top Miami financial advisor they can trust to preserve and multiply their wealth will appreciate the expertise of WE Family Offices. With more than 40 team members and a very low client-to-employee ratio, they guarantee personalized attention.

With an experienced team, client-centric approach, and philosophy of trust and objectivity, WE Family Offices solidifies their 5-star rating as one of the top wealth management firms in Miami to consider partnering with in 2019.

Related: [Top Wealth Managers and Advisors in Florida](#)

Dimension Capital Management Review

With over three decades of experience, [Dimension Capital Management](#) is a privately-owned boutique financial advisory firm in Miami that serves high-net-worth individuals, families, and institutions in the U.S. and abroad.

The firm is a [fee-only](#) Miami wealth management firm that excels at managing the complex finances of the wealthy and can provide completely customized solutions.

Key Factors That Enabled Dimension Capital Management to Rank as a Top Miami Wealth Management Firm

Fee-Only Investment Advisor

As a fee-only wealth manager in Miami, the firm does not receive any other compensation beyond client fees, which eliminates the inherent conflict of interest that comes with commission-based arrangements.

With this pricing structure, clients can trust that they will receive advice that is truly unbiased with no hidden agendas. DCM has additionally been an SEC Registered Investment Advisor since 1997 and takes their commitment to put their client's best interest first very seriously.

5-Step Investment Process

As a dynamic wealth manager and financial advisor in Miami, Dimension Capital Management has the industry knowhow to offer highly objective and tailored solutions to its clients.

This top Miami wealth management firm has a comprehensive, 5-step investment process to create and manage portfolios according to each client's unique risk and return objectives. This includes:

- Understanding Client Needs
- Macroeconomic Factor Analysis
- Asset Allocation and Identification of Investable Themes
- Manager Selection
- Portfolio Construction and Monitoring

Rating Summary

Dimension Capital Management employs a fresh, global-market perspective and brings innovative thinking to the table when evaluating investments and developing smart portfolio strategies.

While Dimension Capital Management offers a lot of value to clients, one area where we found them lacking in comparison to competing Miami wealth management firms was in a full description of their services offered. For this reason, we've given them a 3-star rating.

By elaborating on key components of their wealth management services, like comprehensive advisory capabilities, Dimension Capital Management could easily

improve both their value proposition to new clients and the rating as a top wealth management firm in Miami.

Don't Miss: [Best Financial Advisors in San Diego, California](#)

Firestone Capital Management Review

Founded in 1991, [Firestone Capital Management](#) is a top-rated Coral Gables, Florida wealth management firm that only measures their success by the success of their clients.

The firm is a [fee-only](#) financial advisor in the Miami area that believes in building long-lasting relationships with clients in order to custom tailor plans that address their concerns and objectives for the future.

Key Factors That Enabled Firestone Capital Management to Rank as One of the Best Financial Advisors in Miami, FL

Experienced, Well-Credentialed Team

While the team of Miami financial advisors at Firestone Capital Management may be smaller than that of larger financial firms, they offer a wealth of experience and industry knowledge.

Each Miami financial advisor at Firestone Capital Management holds at least one industry-leading certification, including:

- CFP®—Certified Financial Planner
- CFA®—Chartered Financial Analyst
- RP®—Registered Paraplanner

Their seasoned team also brings a unique balance across a broad spectrum of ages to provide continuity and forward-looking sustainability.



Our mission is simple:
to connect with our clients and to focus the collective
efforts of our team toward making their long-term
financial goals a reality.

Top Financial Planning Firms in Miami & Coral Gables

Client-Centric Philosophy

For Firestone Capital Management, the client experience is first and foremost. This means utilizing a collaborative, team-based approach to every financial plan and building positive, long-term relationships with each and every client.

Rather than provide clients with one single point of contact, Firestone offers the value of experience, qualifications, and creative vision of every team member.

With this approach, clients can connect with anyone at the firm at any time and expect to have unlimited, informed access about their personal financial goals and progress whenever they like.

Rating Summary

Firestone Capital Management has an exceptional team with diverse expertise to offer clients a more in-depth vision for their financial plan and portfolio. They also offer a wide range of financial planning services, including retirement planning, estate tax structuring, asset building programs, and more.

However, compared to competing Miami financial advisors, we found that the description of how each financial service is carried out was lacking any detail or depth. This could cause potential clients to find it challenging to fully evaluate Firestone Capital Management's capabilities.

By providing additional details on what clients can expect throughout each service, Firestone Capital Management could easily improve both their value proposition to new clients and their rating as one of the best financial advisors in Miami, FL.

Related: [Top Financial Advisors in Charlotte, North Carolina](#)

Conclusion – 2019 Top 11 Financial Advisors in Miami and Coral Gables, Florida

Whether you're a young professional, an entertainer, a retiree, or ultra-high-net-worth family, one of these top-rated Miami & Coral Gables financial advisory firms will have the expertise to positively manage your financial needs.

Now that you've been introduced to the best Miami area wealth management firms, your next step would be to narrow down the list to your top 3 to 5. Some of the criteria you can use to select your best matches are:

- Wealth level the firm works with
- Areas of expertise
- Range of services
- Fees and fee structure

Once you've identified the best firms on this list for your needs, you'll want to schedule an introductory meeting with them to discuss your financial situation and goals and get a feel for their work style.

Once the process is complete, your choice of the best financial planner in Miami to work with your money will be much more clear and you can get started with them building a solid financial future.

Rate Table Disclaimer

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

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