
Top 10 Best Financial Advisors in Austin, TX | 2019 Ranking

RANKING & REVIEWS BEST FINANCIAL ADVISORS IN AUSTIN

Finding the Top Financial Advisors in Austin, Texas to Partner with in 2019

The capital city of Texas is also one of the fastest growing cities in the country. This means that the demand for financial advisors in Austin keeps increasing along with the population.

As you sort through hundreds or thousands of financial planners and wealth managers in Austin, TX, trying to compare them all can be puzzling. Do you choose fee-only or fee-based? What income levels do these financial advisors work with? Those are just two of the multiple questions you need to ask yourself in order to narrow down your search.

Whether you're new to investing or a seasoned pro, the sheer number of options can make finding an Austin financial planner that meets your specific financial needs an arduous task. That's where AdvisoryHQ's annual rankings come in and make the search much easier.

We rank financial advisor and wealth management firms in cities all across the United States, Canada, and in the United Kingdom, choosing the ones that we feel provide unique, value-added qualities for those seeking financial and investment guidance.



Award Emblem: Best 10 Financial Advisors in Austin, TX

In this 2019 best Austin, Texas financial advisors ranking and review, we'll assist you in your financial planner search by answering common consumer questions like:

- What client types do top Austin wealth management firms work with?
- What are the basic services found at financial advisors in Austin, Texas?
- What's the difference between fee-based and fee-only?
- Are there specialties that make one firm stand out over another?

Top 10 Best Financial Advisors in Austin, TX | Brief Comparison & Ranking

Best Financial Advisors in Austin, TX	2019 Ratings
Astoria Strategic Wealth	5
Austin Asset	5
Barnett Financial	5
Bell Wealth Management	5
Briaud Financial Advisors	5
FMP Wealth Advisers	5
ML&R Wealth Management, LLC	5
Richard P. Slaughter Associates	5
Stone Asset Management, Inc.	5
WorthPointe	5

Table: Top 10 Best Financial Advisors in Austin | Above list is sorted alphabetically

How Should I Choose a Financial Advisor in Austin, Texas?

Everyone has their own unique financial needs and goals for the future. You may be in mid-life and want to build up your retirement plan, just starting out and would like to begin investing, or dealing with the intricacies of generational wealth management.

But no matter which your specific financial situation, knowing some questions to ask and differentiating factors can help you make a better choice for your Austin financial advisor. Here are a few of those.

What is their Fee Structure?

Some wealth managers in Austin earn compensation only from their client fees, they are called “fee-only” financial advisors. This is a preferred fee type because it means they’re not accepting commissions for selling any particular financial products.

Other financial advisors in Austin are compensated both from client fees and can earn commission from third-party financial products, they are called “fee-based.” While fee-based financial planners may have a conflict of interest due to accepting commissions, many try to negate this by also being what’s called a “fiduciary.”

A fiduciary takes on a legal obligation to be completely transparent about their compensation and to always acts in the best interest of their clients.

What Type of Clients Do They Work With?

Some financial planners in Austin cater to a specific demographic, like women, business executives, young families, retirees, or those who are considered high-net-worth. By

understanding their client niche, you can better understand if a particular Austin advisor will be a good fit or not for your specific needs.

What is Their Range of Financial Services in Austin?

Do you need investing guidance and accounting and tax services? Some financial advisors in Austin, Texas offer fewer services than others. If you're looking for a full-service firm, you'll want to make sure you ask if they offer other financial services beyond investments and wealth management, such as insurance, tax planning or CPA services.

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 Financial Advisors in Austin and Wealth Management Firms in Austin, TX

Below, please find the detailed review of each firm on our list of 2019 best financial advisors in Austin that are included in our ranking. We have highlighted some of the factors that allowed these Austin financial advisors to score so well in our selection ranking.

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

- [Astoria Strategic Wealth](#)
- [Austin Asset](#)
- [Barnett Financial](#)
- [Bell Wealth Management](#)
- [Briaud Financial Advisors](#)
- [FMP Wealth Advisers](#)
- [ML&R Wealth Management](#)
- [Richard P. Slaughter Associates](#)
- [Stone Asset Management, Inc.](#)
- [WorthPointe](#)

Click below for previous years' rankings:

- **2018 Review: [Top 10 Best Financial Advisors in Austin, TX](#)**
- **2017 Review: [Top 9 Best Financial Advisors in Austin](#)**
- **2016 Review: [Best 10 Financial Advisors in Austin](#)**

Astoria Strategic Wealth Review

For over 20 years, [Astoria Strategic Wealth](#) (formerly known as Pauley Financial) has helped affluent individuals and families achieve the life they envision. This Austin wealth management firm is a [fee-only](#), fiduciary financial advisor that has locations in Austin, Dallas/Fort Worth, and San Antonio, Texas.

The firm commits to the principals of always putting their client's interests first, being honest, forthright, and transparent, and exceeding continuing education requirements.

This top-rated financial advisor in Austin serves medical professionals, business owners, independent women, young professionals, mid-career professionals, and those nearing or already in retirement.



Austin, Texas Top Financial Advisors 2019

Key Factors that Enabled Astoria Strategic Wealth to Rank as a Top Financial Advisor in Austin

Engaging Leadership Team

The leadership team at Astoria Strategic Wealth consists of committed professionals that bring a range of educational backgrounds, career experience, and personalities to the table. Their backgrounds include former service in the U.S. military as well as business and mathematics expertise.

You can read each team members' background in detail on Astoria's website, and they offer a glimpse into the personality of this dynamic group of advisors. This gives an opportunity for clients and prospective clients to get to know their financial advisor before even stepping through the front door.

Financial Services for Independent Women

For women looking for the best financial advisor in Austin to partner with, Astoria Strategic Wealth believes in helping you achieve financial freedom and reach your goals.

This Austin wealth manager understands that independent women have distinct financial realities, including longer life spans and a greater likelihood of taking a break from the workforce to care for family responsibilities.

Astoria Strategic Wealth is fully prepared to answer any financial questions that women may have, regardless of their marital status. Their goal is to empower women through financial independence.

Astoria Strategic Wealth provides Women and Finance Case Studies on their site for those unsure of the results they may experience after working with this Austin financial planner. These case studies discuss financial complications of divorce, second marriages, saving for retirement, the loss of a spouse, and more.

Rating Summary

Astoria Strategic Wealth is not one of those Austin financial advisors that is simply interested in your money and making all the decisions for you. This top wealth management firm is a big believer in educating their clients on the process so you can fully understand your options and make informed decisions.

With their engaging approach that instills trust between clients and their advisors, and also lays a foundation for long-term relationships, Astoria Strategic stands out as one of the top-rated financial advisors in Austin, TX and earns a 5-star rating.

[Don't Miss: Top Financial Advisors in Dallas, Texas \(Ranking of Dallas Wealth Advisors\)](#)

Austin Asset Review

[Austin Asset](#) prides themselves on “disrupting the status quo” for over 30 years. This is a [fee-only](#) wealth management firm in Austin that takes a holistic approach to financial planning and provides a full range of financial services.

While their website doesn't specifically exclude any type of clients, this Austin financial advisory firm provides services and financial planning tools to high-net-worth families and non-profit organization in the greater Austin area.

Key Factors that Enabled Austin Asset to Rank as a Top Financial Advisor in Austin

Solid Wealth Planning Approach

The targeted approach to wealth planning developed by Austin Asset sets them apart from other Austin financial planners. To help bring numbers to life and help them make sense, they've created various systems and proprietary tools to give you the most comprehensive approach available.

Two examples are their Building Organized Wealth (BOW©) model, used to model different income/expense/savings scenarios, and Actual Rate of Return on Wealth (ARROW©), which tracks actual portfolio performance against yearly goals.

Both are designed to meet specific client needs while looking ahead to building a strong financial future.



Top Austin Wealth Management Firms

Large-Scale Boutique Style

While Austin Asset is known as a boutique firm, catering to families and non-profits to provide the best and most personalized service, they also offer a full spectrum of other financial services.

From negotiating the mortgage on your new house to keeping an eye on your tax withholdings to reviewing your employee benefits, their financial professionals have the expertise to cover multiple financial requirements.

Not only does their staff consist of Certified Financial Planners, accountants, advisors, and executives, their Business Advisory Board is comprised of five additional professionals who are the best of the best, an invaluable asset to their team and your financial future.

Rating Summary

Austin Asset has a strong focus on creating and sustaining long-term relationships and providing a full range of boutique financial services to their clients. They were also one of the first fee-only financial advisors in Central Texas.

With their pioneering philosophy and commitment to providing clarity and purpose in their financial management services, Austin Asset is one of the top financial advisors in Austin that has earned a 5-star rating.

See Also: [Best Financial Advisors in Atlanta, Georgia](#)

Barnett Financial Review

[Barnett Financial](#) is a self-described boutique wealth management firm in Austin that is both [fee-only](#) and a fiduciary. Meaning this Austin financial advisor is legally bound to put their clients' interest above their own and their fee structure aligns their interests with those of their clients.

Their goal is to offer a broad range of tailored financial planning and investment services and act as a trusted sounding board to help their clients worry less and enjoy life more. Barnett Financial also works to coordinate with other financial professionals you may be working with for a holistic approach to wealth management.

Key Factors that Enabled Barnett Financial to Rank as a Top Financial Advisor in Austin

A Deep Understanding

This top-rated Austin financial advisory firm believes that getting to know their clients is the key to giving them the best expert financial services available. They take a personal interest in each client's unique experiences and life story.

Even before the topic of conversation turns to finances and asset allocation, Barnett Financial's experienced advisors will take the time to understand your life philosophy, your dreams, and your goals.

Once they've gotten to know you, they then begin working with you to shape your financial plan, with a full depth of knowledge to guide them.

Tailored Services

Barnett Financial does not take a "cookie cutter" approach like some firms do. Instead, they choose to personalize services to each client, which gives them the flexibility to include in products that are crucial for one client and leave them out when they don't pertain to another.

This financial planner in Austin has services that include:

- Goals and Objectives
- Cash Flow/Budgeting
- Retirement Planning
- Investment Analysis and Recommendations

- Employee Benefits
- Life and Disability Insurance Needs Analysis
- Income Tax
- Estate Planning
- Risk Management
- Education Funding
- Business Planning



Best Financial Management Firms in Austin, Texas

Rating Summary

Barnett Financial checks all the boxes when it comes to being an Austin financial advisor you can trust. They are a Registered Investment Advisor that is fee-only and also a fiduciary, with the additional benefit of legally-mandated, unbiased financial advice.

Their personal and tailored approach to wealth management is also a benefit to clients who want a financial plan that fits their needs and goals perfectly.

When the above are combined with a robust set of services, this provides a competitive advantage, instilling trust, creating high standards of service, and earning Barnett Financial a 5-star rating as one of the best wealth management firms in Austin.

Don't Miss: Top Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota)

Bell Wealth Management Review

[Bell Wealth Management](#) is a selective [fee-only](#) wealth management firm in Austin, TX. A majority of their clients have a net worth of over \$1,000,000. In addition to working with private clients and multi-generational families, they also specialize in assisting physicians and businesses owners with high-quality financial advisory services.

Since 1997, this Austin financial advisor has believed in providing sophisticated, thoughtful, and comprehensive investment management. They offer a unique level of service that isn't found at other financial planners in Austin, TX.

Key Factors that Enabled Bell Wealth Management to Rank as a Top Financial Advisor in Austin

Specialized & Comprehensive Services

As an expert financial advisor in Austin, Bell Wealth's advisors have a broad range financial expertise in multiple areas to serve a variety of client needs. Their Investment Consulting services include:

- Asset Allocation
- Portfolio Management
- Executive Compensation
- Alternative Investments

For Advanced Planning challenges, these Austin wealth managers can assist you with:

- Wealth Enhancement
- Wealth Protection
- Wealth Transfer
- Charitable Giving

No-Cost Second Look

Need someone to take a second look at your current investment portfolio? Bell Wealth Management offers a no-cost review and second opinion, so you can get a better understanding whether or not your portfolio is designed to meet your financial goals.

This is an incredibly valuable service for individuals and business owners, and it's one that exemplifies this Austin wealth manager's philosophy of putting the client and their interests first.

Not many financial advisors in Austin are willing to provide a no-cost second opinion, which sets Bell Wealth Management apart as one of the top Austin wealth management firms for those that wish to be at the top of their financial game.



Top-Rated Wealth Management Firms in Austin, TX

Rating Summary

In addition to the specialized “concierge-like” service and robust expertise offered in-house at Bell Wealth Management, they have long-standing relationships with several financial firms such as Charles Schwab, Vanguard, and the CFA Institute.

They know their clientele well and offer services tailored to meet the needs of the higher net-worth investors. Their commitment to treat your success as their success is just another reason that Bell Wealth Management stands out among the best Austin wealth management firms and has earned a 5-star rating.

Related: [Best Financial Advisors in Lexington & Louisville, Kentucky](#)

Briaud Financial Advisors Review

Located in College Station, just a short drive from Austin, [Briaud Financial Advisors](#) provides comprehensive services including investment management and financial planning for high-net-worth families and individuals, in Austin, TX and across the United States.

Janet Briaud founded this Austin wealth management firm in 1986, after losing a half of a personal investment with a fee-based firm. That experience drove her to build an investment planning firm without any conflicts of interest, and for over 30 years, Briaud has maintained their [fee-only](#) structure and fiduciary commitment to clients.

This top-rated financial advisor in Austin offers a variety of financial guidance, including family office, financial planning, investment management and trust services.



Austin, Texas Top Wealth Management Firms

Key Factors that Enabled Briaud Financial Advisors to Rank as a Top Financial Advisor in Austin

Objective Advice

Objectivity is a crucial consideration for many clients looking for an Austin financial advisor, and this is an area where Briaud excels as one of the best financial advisors in

Austin, TX. The firm delivers both specialized and unbiased advice because they adhere to fiduciary standards.

In addition to providing unbiased financial guidance to individuals and families, they specialize in working with medical professionals and university professors and administrators.

Briaud's financial advisory team prides themselves on providing that objective advice with a warm touch. You won't find any cold or impersonal financial advisors here, they believe in treating clients like members of their own family and closest friends with hugs instead of handshakes.

Exclusivity

To maintain a high quality of service to their clients, this top wealth management firm in Austin provides services that are personalized and exclusive.

Briaud only works with a limited number of select clients, allowing each Certified Financial Planner that works for this Austin financial advisor to fulfill the needs of a very small group of clients fully. This allows them to focus on even the smallest details of their clients' financial lives.

Their "quality not quantity" approach is something that makes this top wealth manager in Austin, Texas stand out and is something many clients appreciate about Briaud Financial Advisors.

Rating Summary

While many potential clients may anticipate a cold, impersonal touch when working with Austin financial advisors, Briaud strives to break out of this mold by delivering services with a warm, friendly approach that makes clients feel like family.

While some firms out there are more salesman than investment advisors, the history of Briaud's founder has always been to put the clients' interest first which fosters their goal of building long-term relationships gradually over time.

Their fee-only and fiduciary commitments, their highly customer-centric approach and personalized experience has led Briaud to earn a 5-star rating and solidify their ranking as one of the best firms among all Austin financial advisors.

Popular Article: [Top Financial Advisors in St. Louis, MO](#)

FMP Wealth Advisers Review

With locations in Austin and Beaumont, Texas and Lake Charles, Louisiana, [FMP Wealth Advisers](#) has been providing personal wealth management services since 1987. They also have the distinction of being one of the first [fee-only](#) financial advisory firms.

As one of the best fee-only financial planners in Austin, FMP employs a tight-knit group of Austin financial advisors, specialists, and service professionals all dedicated to putting their clients' needs above all else.

Key Factors that Enabled FMP Wealth Advisers to Rank as a Top Financial Advisor in Austin

Independent Fiduciary & Fee-Only

It's important for anyone seeking a personal financial advisor in Austin, TX that they know they can trust the firm to give them the best advice for their financial needs and goals.

FMP understands the importance of establishing trust within the client relationship, which is why they are:

Independent & Fee-Only

Because they are an independent, fee-only financial planner in Austin, TX, FMP does not accept commissions from third parties for sales of their financial products, such as stock brokerages or insurance companies.

This gives clients a foundation for their relationship with this Austin financial advisor that is built upon trust and a knowledge that they truly are fully committed to the financial well-being of their clients.

Fiduciary Commitment

Rather than adhere to a basic "suitability standard," FMP adopts a fiduciary responsibility, which is another level of commitment to their clients. A fiduciary is legally responsible to always act in their client's best interests and be completely transparent about any fees.

Firms that live by a fiduciary commitment will often have client-facing services and management philosophies, reflecting this "client-first" commitment, which can set them apart from other financial advisors in Austin.



Best Financial Advisors in Austin

Financial Solutions

As a top-rated financial advisor in Austin, TX, FMP offers a variety of comprehensive, detailed financial solutions. These include:

- Financial Planning—They define financial planning as “not a product you buy once,” but instead an evolving relationship designed to meet changing needs.
- Investment Management—FMP provides the discipline needed to help clients successfully navigate the ups and downs of the markets.
- Qualified Plans—They help simplify corporate retirement plans for business clients, assisting them with the process of implementing and monitoring employee retirement plans.
- Private Investments—Through their private investment services, FMP provides alternative strategies, such as diversification for sophisticated portfolios, to fine-tune a client’s overall strategy for the best outcome.

Rating Summary

FMP's close-knit team of financial advisors and specialists may be slightly smaller than competing wealth management firms in Austin. But their service offerings and client-centric philosophies are as robust as that of the largest firms.

Clients benefit from a wide range of services, a focus on building long-term relationships, and a fee-only, fiduciary business model. Another consideration for this top Austin financial planner is that they offer a free initial consultation for financial planning strategies, which makes them an excellent firm for those new to investing.

All these factors earned FMP a 5-star rating as one of the best Austin financial planners for you to consider in 2019.

[Read More: Top Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee](#)

ML&R Wealth Management LLC Review

As a top [fee-only](#) team of Austin wealth managers, [ML&R Wealth Management LLC](#) adheres to a philosophy of client first. They believe in keeping in regular contact with their clients and updating investment strategies as their life situations change and evolve.

ML&R has locations in Austin and Round Rock, Texas and approaches their work with the idea that managing assets is about more than just money. They believe in empowering their clients and their financial goals and dreams.

Key Factors that Enabled ML&R Wealth Management LLC Review to Rank as a Top Financial Advisor in Austin

The Fiduciary Standard

The fiduciary standard that ML&R adheres to garners the trust of their clients right away. As one of the top financial advisors in Austin, this firm bases all guidance and advice on the highest of ethical standards, making decisions solely in the best interest of the client.

As a fee-only firm, ML&R does not receive revenue from third parties, including commissions, which could lead to a conflict of interest with clients.

Holistic Approach

ML&R, one of the top financial advisors in Austin, uses an approach that values evidence over emotion and works with clients with complete honesty and transparency in order to custom design a financial plan to fit their needs.

Academic research, rather than opinions based on financial news cycles, are part of their investment philosophy. Ultimately, the goal is to help their clients see the best possible returns from the market, based on diversification, low costs and appropriate levels of risk.

The dynamic holistic approach of this Austin, Texas top financial advisor incorporates multiple components of a client's financial requirements, including:

- Protecting your family
- Helping you maintain and enjoy your lifestyle
- Achieving financial comfort
- Planning for the expected and unexpected
- Building a legacy

Specialized Financial Services for Women

One of the key things that sets ML&R apart as one of the best Austin wealth management firms, is their focus on serving the financial needs of women.

Women aren't always well-served in the financial planning sector and tend to feel misunderstood by some Austin financial advisors. ML&R has made a strong commitment to helping women gain financial freedom and helping them with:

- Setting goals and objectives, including family and charitable giving
- Budgeting, cash flow planning, and retirement projections
- Managing executive compensation and benefits
- Coordinating with taxes and investments
- Transitioning wealth between generations

As a further demonstration of ML&R's dedication to understanding women and their financial needs, firm partner, Stuart Vick Smith, is a recognized industry expert in Women and Wealth, authoring a book called *Finding Your Financial Path: A Guide for Women Through Life's Twists and Turns*.



Best Wealth Management Advisors in Austin, Texas

Rating Summary

Their personalized, fact-based approach and fee-only advisement make ML&R Wealth Management a top financial advisor in Austin, TX to consider partnering with in 2019.

This is a firm that both values transparency and building long-term relationships in order to best serve their clients and evolve their portfolios to match any life changes.

Their expertise in providing specialized financial services tailored to the needs of women is another factor that makes ML&R stand out among other Austin financial advisors, earning the firm a 5-star rating overall.

Related: [Best Financial Advisors in Omaha, Nebraska](#)

Richard P. Slaughter Associates Review

[Richard P. Slaughter Associates](#) began in 1991 and has offices in both Austin and Dallas, Texas. This Austin wealth management firm is a [fee-only](#) Registered Financial Advisor that is one of the few to assume fiduciary duties and liability as a 3(38) advisor. This means they don't earn commissions and do things in their client's best interest always.

They provide an array of investment services to wealthy clients, including business owners, professionals, and those that find themselves suddenly wealthy. As a top-rated Austin financial advisor, they offer balanced and diversified portfolios, retirement planning, and asset management services.

Key Factors that Enabled Richard P. Slaughter Associates to Rank as a Top Financial Advisor in Austin

Awards and Recognition

Many of the Austin wealth managers on our ranking have earned multiple accolades in their industry, and Richard P. Slaughter Associates is among them. The firm has won many awards and consistently been recognized over the years both locally and nationally.

For example, this top Austin financial planner has been named by *Texas Monthly* as a Five Star Wealth Manager for six consecutive years, and each of their executive team were recognized with individual honors.

One recognition in particular instills even more client trust and respect. Richard P. Slaughter Associates is an NABCAP Premier Advisor, which recognizes firms that uphold the utmost in business standards, first-class financial management capabilities, and are dedicated to transparency in financial services.



Austin, Texas Top Wealth Management Firms

RPS Retirement Plan Advisors

This financial advisor in Austin provides a specialized service for those planning for retirement - RPS Retirement Plan Advisors.

Their goal with RPS was to provide 401(k) services to all clients that offer the same array of options as plans typically reserved for high-net-worth clients, all through fiduciary advisors.

Through RPS Retirement Plan Advisors, clients are prepared to retire on time and be financially secure all while having the knowledge that their advisor is on their side and not receiving any third-party commissions.

Rating Summary

Starting as one of the nation's first fee-only wealth management firms, this Austin leader has been committed to the financial wellbeing of their clients from inception and prides itself on its fiduciary commitment to transparency.

A unique aspect of Slaughter Associates is their specialized approach to wealth source. This leading financial advisor in Austin understands that not all wealthy individuals and

families are the same, so they create a personalized approach to financial planning for each client.

This award-winning firm's individualized services, retirement planning expertise, and fee-only structure, has helped Richard P. Slaughter Associates stand out as one of the best firms for expert wealth management in Austin, TX, and scored them 5-stars.

Popular Article: [Top Financial Advisors in Kansas City, Leawood, and North Kansas City](#)

Stone Asset Management, Inc. Review

[Stone Asset Management, Inc.](#) was founded in 2004 and believes in working with their clients to craft a personal Investment Policy Statement before they invest a single dollar. This independent, [fee-only](#) financial planner in Austin is also a fiduciary, putting their client's needs first always.

The team of experienced financial advisors at Stone Asset Management help simplify their clients' lives and give them clarity on their financial standing so they can create a plan to meet their goals and eliminate that feeling of being overwhelmed.

Key Factors that Enabled Stone Asset Management to Rank as a Top Financial Advisor in Austin

Willing to Work with Smaller Investors

If you're not in the "high-net-worth" bracket, it can be difficult to find a good wealth management firm in Austin, TX because many of them only work with higher asset clients, but that isn't the case with Stone.

This experienced financial planner states "You don't necessarily need to consider yourself 'wealthy' to benefit from working with Stone Asset Management," meaning they're open to working with clients at all income levels and helping them chart a successful financial course.

This Austin financial planner offers both project-based and hourly financial planning rates, which allows clients to benefit from financial expertise without needing to meet income or investment requirements.

GuideTrack Service

A unique service that Stone Asset Management mentions in their [ADV](#) is called GuideTrack. This service fills in the gaps for clients that do not need complete investment management, but still want an ongoing relationship with the firm.

Subscriptions are tailored to meet the level of support each client requires, and provides clients with:

- Online access to personal financial plans
- Ability to link accounts and measure progress
- Access to educational material and webinars
- Annual virtual meetings
- Email access to firm personnel



Best Financial Planners in Austin, TX

Rating Summary

While Stone Asset Management, Inc. may be among the smallest firms on our list of the top-rated Austin financial advisors, they offer an excellent depth of financial management expertise and provide excellent value to their clients. They are also committed to serving them as a fee-only fiduciary firm.

This top wealth manager in Austin, Texas is also a beacon for smaller investors and those just starting out, with extremely flexible fee options and welcoming demeanor. The firm's GuideTrack service is a unique benefit that allows clients to continue to receive financial guidance at a completely customized level.

Their focus on transparency and services for both low and high-net-worth clients make Stone Asset Management a competitive choice among financial advisors in Austin, TX and one that's earned a 5-star rating.

WorthPointe Review

[WorthPointe](#) is a boutique investment advisor in Austin, TX that bases their business and services on the concept of relationships. They seek to create long-term relationships with their clients and create custom solutions that are designed to meet their unique financial goals.

As a leading Austin wealth management firm, WorthPointe is a [fee-only](#), fiduciary financial advisor that takes the time to invest in a team of experts with the same experience, knowledge, and commitment to putting the client first.

WorthPointe has a total of seven offices, serving clients in Austin, San Diego, Dallas-Fort Worth, Orange County, and Wyoming.

Key Factors that Enabled WorthPointe to Rank as a Top Financial Advisor in Austin

Multi-Faceted Philosophy

A core investment philosophy is one of the important ways that financial advisors in Austin and Austin wealth managers can set themselves apart from other firms.

The investment philosophy at WorthPointe, one of the leading financial advisors in Austin, encompasses the following:

- Success is built on client trust and confidence in their advisor, making transparency a vital part of their Austin wealth management services.
- WorthPointe's investment approach is based on diversification, low costs, and tax efficiencies, as well as helping you both protect your wealth and create a sustainable plan for the future.

- Finally, WorthPointe always tries to help each client achieve their individual financial goals and personal goals, which is another factor that sets them apart as a top-rated financial advisor in Austin.



Top Wealth Management Firms in Austin

WorthPointe 360 Personal Financial Dashboard

Digital tools that keep up with evolving technology and help investors save time aren't found at every Austin financial advisor you may research. This is an area where WorthPointe stands out with WorthPointe 360, their personal financial dashboard that helps you simplify your finances.

Their dashboard keeps everything you own in a single easy to access spot. No need to remember multiple passwords to get an overview of your finances. You can monitor your investments in real-time and access your accounts at any time.

WorthPointe 360 allows you to access:

- Investments
- Retirement accounts
- Insurance policies
- Reward miles
- Credit cards

- and more

Rating Summary

WorthPointe's strong commitment to clients as a fee-only fiduciary and their wide range of services provided to clients across their seven offices (1 in Austin), make them one of the top financial management firms in Austin to consider partnering with in 2019.

Their financial planning dashboard sets them apart as firm that takes advantage of technology to make their clients' lives easier and make their finances simple to monitor from any type of device.

Our review also found that the WorthPointe team is truly invested in offering comprehensive, client-centric services and investing philosophies to their clients and forging life-long relationships. All this solidifies the firm's 5-star rating and ranking among the best financial advisors in Austin, Texas.

Conclusion: 2019 Top 10 Best Financial Advisors in Austin, TX

Now that you have more information upon which to choose your perfect financial advisor in Austin, Texas, what's the next step?

It's always good to do a face-to-face meeting with any Austin wealth manager to get a feel for their team and how they are to work with. Many financial advisors offer a free-consultation and some also provide a free second opinion service for investment portfolios.

To make the most of an initial meeting with a financial planner in Austin, TX, you'll want to bring along a list of your assets, which will help them identify the best financial strategies for you. These could include:

- Tax returns that show your income
- Retirement or pensions
- Stocks or investments you currently have
- Real estate, or other physical assets

Use this list as a starting point to compare your top financial advisors in Austin and narrow down your options according to client type. Most of these top-rated Austin-based RIAs, financial advisors and wealth managers do not have a minimum dollar amount for your assets, but there are a few that do.

Another helpful thing you should do is to create a list of your financial goals and dreams. What financial objectives do you have in the next 5, 10 or 20+ years?

Are you nearing retirement and need to ensure you have investments that pay dividends? Is a child's education a main concern? Have you had a major life transition that impacted your finances? Use these key points as another way to match yourself up with the best possible financial advisor.

Once you've chosen some firms to check out further, remember to bring your questions as well. Most top Austin financial advisors are more than happy to answer any questions you have. Several will also provide you with a no-cost review to show you what they can do for you.

The most important thing is to take your time and research your financial planner thoroughly, because if all goes well, you'll be able to rely on their financial expertise and guidance for a lifetime.

Rate Table Disclaimer

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

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