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# **10 Best Financial Advisors & Wealth Management Firms in Ohio | 2018 Ranking**

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## **RANKING & REVIEWS BEST FINANCIAL ADVISORS IN CLEVELAND, CINCINNATI, COLUMBUS, & MORE**

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### **2018 Ranking of the Top Financial Advisors in Ohio**

Ohio is one of the most populous states in the country. This makes the already difficult job of finding a financial advisor in Ohio even trickier. Knowing what you want and need from an Ohio financial advisor can make the selection process much easier.

There are plenty of financial advisors in Ohio to choose from—and fortunately, we've done the research and used our specific ranking methodology to present you with the best financial advisors in the state.

You work hard to earn your money. With the extra effort it takes to find a suitable financial advisor in Ohio, you can protect and grow that income for the years to come.



*Award Emblem: Top 10 Best Financial Advisors in Ohio*

## **Top 10 Best Financial Advisors in Ohio | Brief Comparison & Ranking**

<b>Best Financial Advisors in Ohio</b>	<b>Highlighted Features</b>	<b>Ratings</b>
Budros, Ruhlin & Roe, Inc.	Specialty in divorce financial planning	5
Carnegie Investment Counsel	Customized portfolio management approach	5
Cornerstone Capital Advisors	Fiduciary assessment services	5
Fairport Asset Management	Clear, client-centric values	5
Foster & Motley	Extensive financial planning capabilities	5
Johnson Investment Counsel, Inc.	Family office & trust services	5

Partnership Financial LLC	Fee-only, fiduciary firm	5
PDS Planning	Extensive range of financial services	5
Summit Financial Advisors	Comprehensive wealth management & financial advisory services	5
Truepoint Wealth Counsel	Detailed service listings	5

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

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## Fee-Only vs. Fee-Based Ohio Financial Advisors

When it comes to evaluating financial advisors in Ohio, there are typically two types of firms to consider: fee-only and fee-based advisors.

How do you know which type of Ohio wealth management firm is right for you? Below, we'll provide you with a brief overview of everything you need to know about the differences between fee-only and fee-based Ohio financial advisors.

### Fee-Only

When an investment firm or a financial advisor in Ohio says that they are "fee-only," this means that they *do not* accept commissions or third-party referral payments.

Because an advisor's only source of income comes from the client, a fee-only pricing structure minimizes the inherent conflicts of interest that come along with recommending and selling investment products.

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

Uniquely, each financial planner in Ohio on our list is a fee-only firm, meaning that you can trust these advisors to provide transparent, unbiased financial advice every step of the way.

### Fee-Based

Fee-based firms will receive *some* direct compensation from clients but are free to accept commissions from the companies who provide their financial products.

While a fee-based structure does create some potential conflict, many fee-based firms are also fiduciaries, which often counteracts the potential for conflict.

Ohio financial advisors that adopt a fiduciary commitment are legally responsible to fully disclose any conflicts of interest and are required to put the interests of their clients ahead of their own.



*Financial Advisors in Cleveland, Ohio*

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## **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 Ohio**

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

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

- [Budros, Ruhlin & Roe, Inc.](#)

- [Carnegie Investment Counsel](#)
- [Cornerstone Capital Advisors](#)
- [Fairport Asset Management](#)
- [Foster & Motley](#)
- [Johnson Investment Counsel](#)
- [Partnership Financial LLC](#)
- [PDS Planning](#)
- [Summit Financial Strategies](#)
- [Truepoint Wealth Counsel](#)

Click below for previous years' rankings:

- 2016 Review: [Top 13 Advisors & Wealth Managers in Ohio](#)
- 2017 Review: [Top 13 Financial Advisors in Ohio](#)

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## Budros, Ruhlin & Roe Review

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Founded in 1979, [Budros, Ruhlin & Roe](#) is a [fee only](#), independent wealth management firm located in Columbus, Ohio.

While the firm has grown substantially since its inception, Budros, Ruhlin & Roe continue to put client satisfaction and long-term relationships as a top priority, making them one of the best financial advisors in Columbus, Ohio.

### **Key Factors That Enabled Budros, Ruhlin & Roe to be Ranked as a Top Financial Advisor in Ohio**

#### **Divorce Financial Advisors**

It goes without saying that divorce can be a stressful and uncertain time, particularly when it comes to managing your finances.

For clients going through a divorce, Budros, Ruhlin & Roe maintains a Certified Divorce Financial Analyst® and multiple Certified Financial Planners™ on staff to provide expert assistance during this financial transition.

Working alongside your legal team, Budros, Ruhlin & Roe can:

- Advise through alternative dispute resolutions
- Divorce mediation
- Collaborative divorce

Ultimately, the goal is to provide creative financial options and strategies to help each client get the best outcome for themselves and for their family.

### **Comprehensive Wealth Management Approach**

As one of the top financial advisors in Ohio, Budros, Ruhlin & Roe takes a holistic approach to wealth management. Partnering with these Ohio financial advisors means addressing a range of financial challenges, including:

- **Financial Independence & Retirement**—Involves a thoughtful, collaborative approach to each client's financial future
- **Risk Management**—Taking appropriate risks to build and protect wealth
- **Tax Planning**—Taxes are intricately linked to overall financial health
- **Education Planning**—Implements 529 plans and other strategies to effectively plan for college costs
- **Estate Planning & Wealth Transfer**—Uses innovative estate planning strategies to help clients maintain their legacy
- **Philanthropic Planning**—Balances good intentions with personal financial needs
- **Investment/Portfolio Management**—Focuses on creating portfolios that match goals, time horizons, and personal risk preferences

### **Rating Summary**

For clients that want wealth management and financial planning strategies that are flexible and geared for long-term success, Budros, Ruhlin & Roe is a great fit. The firm offers comprehensive services with a keen focus on client service, providing a one-stop-shop for an array of financial needs.

Additionally, the firm's fee-only structure and fiduciary commitment promote transparency and trust within the client-advisor relationship, ensuring that clients get unbiased advice and solidifying Budros, Ruhlin & Roe as one of the best financial advisors in Ohio.

***See Also: Best Financial Advisors in Miami and Coral Gables, Florida***

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## Carnegie Investment Counsel Review

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[Carnegie Investment Counsel](#) is a financial advisor in Cleveland, Cincinnati, and Dayton that has been providing expert financial advice for individuals and businesses since 1974.

As a [fee-only](#) firm, Carnegie Investment Counsel is committed to operating under a fiduciary standard, maintaining transparency and acting in the best interests of their clients at all times.

### **Key Factors That Enabled Carnegie Investment Counsel to be Ranked as a Top Financial Advisor in Ohio**

#### **Custom Portfolio Management**

Carnegie Investment Counsel is a Cincinnati, Dayton, and Cleveland financial advisor that prioritizes providing custom portfolio management services for its clients.

They do this by emphasizing the human element of financial advice, taking the time to listen to and understand their clients to meet emotion-based needs with expert advice.

Their principal investment philosophy consists of the following elements:

- Determine proper asset mix for everyone
- Diversify among macro sectors
- Determine appropriate position sizes
- Focus on profitable companies with best prospects for growth
- Keep transaction and other costs low
- Manage for tax efficiency wherever possible



*Carnegie Investment Counsel*

### **Retirement Plan Services**

Providing retirement benefits to employees is a complicated matter, and recent legislation from the Department of Labor has increased the responsibilities of business owners who provide retirement plans.

Carnegie Investment Counsel is a wealth management firm in Ohio that can provide tailored 401(k) plans for businesses, serving as a fiduciary and ensuring that each retirement plan DOL-compliant.

This Ohio wealth management firm's retirement planning service is focused on three key areas:

- Plan Design
- Plan Governance
- Participant Success



Focusing on these three areas ensures this wealth management firm in Ohio builds a proper relationship with the employer, understands their needs, and works diligently towards crafting a plan that leaves everyone involved happy.

### **Rating Summary**

As an exclusively fee-only, fiduciary firm, Carnegie Investment Counsel represents the ideal relationship with a financial advisor in Ohio, as clients can trust that they receive truly unbiased, transparent advice.

To support this principled approach, Carnegie Investment Counsel provides in-depth, comprehensive services, meeting a variety of financial needs and earning the firm a 5-star ranking among the top Ohio financial advisors.

***See Also: Best Financial Advisors in Miami and Coral Gables, Florida***

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## **Cornerstone Capital Advisors Review**

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[Cornerstone Capital Advisors](#) has been providing financial planning and investment management services since 1984.

With a [fee-only](#) structure, they help clients address all areas of wealth management including asset protection, cash flow planning, debt management, and more.

### **Key Factors That Enabled Cornerstone Capital Advisors to be Ranked as a Top Financial Advisor in Ohio**

#### **Integrated Investment Strategy**

Financial planning is about making your money align with your goals so that you can successfully achieve them. A holistic approach will often yield the best results, taking into consideration factors like life stages, passive income, and day-to-day money management.

Cornerstone Capital Advisors values this puzzle-piece approach to financial planning, ensuring that all pieces fit together and work in harmony with each other.

While clients are still working, their financial focus is on wealth accumulation. A financial advisor in Ohio from Cornerstone Capital will discuss goals, wealth enhancement, protection and transfer strategies, and tax minimization strategies.

When it comes to retirement, this Ohio financial planner will discuss tax efficient retirement solutions, social security, IRA withdrawals, legacy planning, and more.

### **Fiduciary Assessment**

Employers providing retirement plans have an extra level of responsibility when providing investment plans for their employees, increasing stress for business owners.

This wealth management firm in Ohio offers fiduciary assessments, reviewing employer-sponsored retirement plans to check that they are compliant with the federal ERISA statute.

This Ohio wealth management firm performs assessments on:

- Participant Directed Plans
- Profit Sharing Plans
- Defined Benefit Plans
- Endowments
- Non-Profits

### **Rating Summary**

With an integrated approach to wealth management, Cornerstone Capital Advisors is a great option for clients that want seamless financial planning and investment strategies.

Uniquely, this Ohio financial advisor also provides fiduciary assessments, providing a great resource for businesses to ensure that their retirement plans are both comprehensive and compliant.

With a fee-only structure, a fiduciary commitment, and an integrated approach to financial health, Cornerstone Capital Advisors is one of the best financial advisors in Ohio to consider partnering with this year.

***Don't Miss: Top Financial Advisors in Orlando, Florida***

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## **Fairport Asset Management Review**

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Founded in 1963, [Fairport Asset Management](#) is a [fee-only](#) wealth management firm in Ohio has been providing financial advice for more than half a century.

Located in downtown Cleveland, the Ohio financial advisors at Fairport Asset Management serves clients in the city and throughout the state.

## **Key Factors That Enabled Fairport Asset Management to be Ranked as a Top Financial Advisor in Cleveland, Ohio**

### **Clear Core Values**

Fairport has a clear understanding of what makes it stand out from other financial advisors in Cleveland, Ohio. The firm outlines its core values as Respect, Discipline, Resolve, and Accountability.

With these values as a foundation, Fairport prioritizes fostering a collaborative relationship with its clients that focuses on listening to their ideas.

They promise discipline in their selection methodology and decision-making processes regarding your money and resolve when it comes to pursuing the best outcomes for clients.

Finally, and perhaps most importantly of all, they promise accountability to regularly reviewing practices and outcomes to remain one of the best financial advisory firms in Ohio.

### **Comprehensive Wealth Management**

These Cleveland financial advisors provide clients with an integrated plan that incorporates all elements of their financial life. Wealth management services offered by Fairport Asset Management include:

- Net Worth & Cash Flow Planning
- Investment Planning & Portfolio Management
- Tax Planning
- Insurance Planning & Risk Management
- Benefits Planning
- Estate Planning & Asset Protection
- Philanthropic Planning

With over 100 years of combined experience and expertise, Fairport Asset Management takes a proactive, expert approach to wealth management.

The firm also boasts an internal investment committee to develop strategies that consider growth, income, and risk management, providing comprehensive financial services to each and every client.



*Fairport Asset Management - Cleveland, Ohio*

### **Rating Summary**

For clients that want a financial advisor in Cleveland with a strong foundation of values and ethics, Fairport Asset Management is a great fit.

Not only is the firm positioned to provide a client-centric approach, but their fee-only structure promotes transparency and trust, two crucial elements of any successful financial planning relationship.

With over 100 years of combined experience, an internal investment committee, and a comprehensive approach to financial health, Fairport Asset Management is one of the best Cleveland financial advisors—and a top Ohio financial advisor—to consider partnering with this year.

***Related: Best Financial Advisors in Omaha, Nebraska***

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## Foster & Motley Review

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Located in Cincinnati, [Foster & Motley](#) is a [fee-only](#) wealth management firm in Ohio with a highly skilled team of Certified Financial Planners, Certified Public Accountants, and Chartered Financial Analysts.

The firm offers a comprehensive combination of financial planning and wealth management services to keep clients on track towards their financial goals.

### **Key Factors That Enabled Foster & Motley to be Ranked as a Top Financial Advisor in Ohio**

#### **Extensive Financial Services**

With a consistent investment philosophy which emphasizes income, value, and quality, Foster & Motley offers a wide range of financial planning and wealth management services:

- Retirement Planning
- Tax Planning
- Estate Planning
- Portfolio Creation & Management
- Insurance Planning
- Cash Flow Planning
- Wealth Optimization
- Net Worth Analysis
- College Planning
- Money Movement
- Charitable Gifting
- Stock Option Planning

#### **Innovation and Continuing Education**

The financial industry is a very dynamic industry. Factors that are legal and political, domestic and international can have an impact on an individual's financial planning and investment strategy.

As a result, it is important for one's wealth management firm in Ohio or elsewhere to foster a culture of continuing education and learning.

Foster & Motley is a financial advisory firm in Ohio that does just that. Not only do they regularly review their processes to check that they are up to date, but they encourage their employees to keep themselves updated as well.

They invest in the education of their employees and require all of them to have completed (or be in the process of completing) a professional certification.



*Top Financial Advisors in Ohio*

## **Rating Summary**

As a fee-only RIA, Foster & Motley is held to a fiduciary standard and is legally required to put clients' interests before the interests of the firm.

Not only does this encourage transparency, but it also supports trust between clients and advisors, an integral element in any successful financial plan.

With comprehensive financial services, a fee-only structure, and a client-centric approach, Foster & Motley is one of the best Ohio financial advisors to consider partnering with this year.

***Popular Article: Best Financial Advisors (IFAs) in Manchester and Cheshire, United Kingdom***

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## Johnson Investment Counsel Review

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With locations in Cincinnati, Cleveland, Columbus, and Dayton, [Johnson Investment Counsel](#) is Ohio's largest independent wealth management firm.

Serving clients since 1965, Johnson Investment Counsel is a [fee-only](#) financial advisor in Ohio.

### **Key Factors That Enabled Johnson Investment Counsel to be Ranked as a Top Financial Advisor in Ohio**

#### **Family Office Services**

As a top financial advisor in Columbus, Ohio, Johnson Investment Counsel helps families come up with intelligent game plans for their wealth. Family Office services specialize in assisting high net worth families devise strategies for protecting their wealth and establishing a legacy.

For Johnson Investment Counsel, these services are not just related to the technical elements of wealth management—it's also about learning how to handle the complexities of wealth as a family unit.

Family values and individual opinions can often clash, and this financial advisor in Columbus, Ohio is prepared to mediate these types of family governance challenges.

This service is provided for individuals and families with a net worth in excess of \$10 million.

#### **Trust Services**

The best Ohio financial advisors can provide expert assistance in helping families manage the transfer and preservation of wealth between generations.

Johnson Investment Counsel offers specialized trust services for individuals, charitable organizations, foundations, endowments, and retirement plans.

This financial planner in Ohio can help clients with:

- Managing the transfer of wealth to the next generation or to a charity
- Avoiding probate court
- Reducing gift and estate taxes
- Special needs trust planning



- Charitable gift planning
- Asset protection



### *Wealth Management in Columbus, Ohio*

#### **Rating Summary**

As a top financial advisor in Columbus, Ohio, Johnson Investment Council offers high-net-worth individuals and families with comprehensive, expert strategies to protect and grow their wealth.

With a fee-only structure, clients can trust that all services and fees will be provided with the utmost transparency, supporting trust and solidifying the firm's ranking as a top Ohio financial advisor.

***Read More: Top Financial Advisors in Montréal & Ottawa, Québec, Canada***

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## **Partnership Financial LLC Review**

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Located in Columbus, [Partnership Financial LLC](#) is a fee-only Ohio financial advisor with a fiduciary commitment to act in the best interests of their clients at all times.



As a top financial advisor in Columbus, Ohio, Partnership Financial prides itself on helping clients build, protect, and manage all aspects of their financial health through various life transitions.

## **Key Factors That Enabled Partnership Financial LLC to be Ranked as a Top Financial Advisor in Ohio**

### **Comprehensive Services**

For Partnership Financial, effective financial planning is all about organization.

With a goal to help ease stress and help each client organize their financial lives, this top financial advisor in Columbus, Ohio offers the following services:

- **Tax Planning & Prep**—Looks for ways to increase tax efficiency through investments, savings, deductions, and contributions
- **Investments**—Constructs a goal-based, diversified portfolio based on objective, personalized recommendations
- **Estate Planning**—Considers guardianship, medical directives, end-of-life considerations, and more
- **Retirement Planning**—Goes beyond portfolio construction to match your retirement lifestyle with your budget
- **Goal Setting**—In-depth conversations to uncover goals for retirement, education, and other related financial goals
- **Cash Management**—Helps clients see where their money is going each month
- **Insurance**—As a fee-only firm, the Ohio financial advisors at Partnership Financial can provide unbiased insurance recommendations

Uniquely, this financial advisor in Ohio also provides real estate services, providing expert advisement on how to align your home and mortgage with your income and cash flow.

### **Fee-Only Fiduciary**

When it comes to choosing a financial planner in Columbus, Ohio, it's important to ensure that you are partnering with a financial advisor that you can trust—after all, dealing with finances can be a delicate, stressful, and intimidating process.

As a fee-only firm, Partnership Financial does not accept outside commissions or any compensation other than what they get from clients. This means that these Ohio

financial advisors do not earn any personal gain by selling specific financial products or securities, ensuring an unbiased approach.

Additionally, firms that take on a fiduciary commitment are legally held to acting in the best interests of their clients and upholding high standards of transparency.

The combination of a fee-only structure and a fiduciary commitment supports trust throughout each step of the wealth management process, demonstrating the high standards of client service and ethics that Partnership Financial maintains in each advising relationship.



*Partnership Financial, LLC*

## **Rating Summary**

For clients that want a comprehensive approach to their financial health, Partnership Financial is a great fit.

The firm's small size and client-centric approach supports trustworthy, long-term relationships, ensuring that clients can utilize these financial services over time.

With a fee-only structure, a fiduciary commitment, and financial services tailored to address a variety of needs, Partnership Financial is one of the best financial advisors in Columbus, Ohio—and across the state—to consider partnering with this year.

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

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## PDS Planning Review

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Founded in 1985, [PDS Planning](#) is a [fee-only](#) firm offering financial planning and wealth management in Columbus, Ohio.

PDS Planning strives to make the process of obtaining good financial health approachable, relevant, understandable, and less complicated, making the firm a great financial planner in Columbus, Ohio for first-timers.

### **Key Factors That Enabled PDS Planning to be Ranked as a Top Financial Advisor in Ohio**

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

For clients that have a wide range of financial needs, finding an Ohio financial advisor that is well-equipped to handle a variety of financial challenges is crucial. PDS Planning offers an impressive array of financial services, including:

- **Investment Planning**—Portfolio analysis, allocation recommendations, and ongoing management
- **Tax Planning**—Tax projection, planning, and side-by-side coordination with CPAs or tax preparers
- **Business Planning**—Summary of current holdings, asset protection options, retirement review, and more
- **Risk Analysis & Planning**—Audit, review, and recommendations for life, long term care, and disability insurance
- **Financial Statements**—Personal balance sheet creation, investment portfolio summary, real estate and business holdings summary
- **Cash Flow Management**—Detailed income and expense statements, existing debt summary, and creation of a financial plan
- **Accumulation**—Projection of current retirement contributions, personal investments, and annual tracking of goal progress
- **Education Planning**—Cost projections, discuss savings plans, and create an education plan

- **Lifetime Income & Retirement Planning**—Projection review, annual tracking, distribution coordination, and more
- **Estate Planning**—Review pertinent documents, make any needed changes, project tax implications, and more

### **Variety of Client Types**

Part of what sets PDS Planning apart as a top financial advisor in Ohio is their ability to make wealth management accessible and, most importantly, easy to understand.

For those that are just beginning to gain control over their finances, this is a huge benefit, particularly if you aren't exactly sure where you fit in on the financial planning spectrum.

PDS Planning makes evaluating your need for financial planning easy by providing detailed client profiles and answers to common wealth management questions that each typically brings. These client profiles include:

- Investor
- Entrepreneur
- Newly Married
- Dual Income, No Kids
- Growing Family
- Single Woman
- Empty Nester
- Planning to Retire
- Retired

### **Rating Summary**

With an intent focus on making financial planning both accessible and convenient, PDS Planning is a great financial advisor in Columbus, Ohio to consider partnering with.

Their approach is wholly client-centric, from their fee-only structure and fiduciary commitment to how they describe their financial planning services, earning PDS Planning a 5-star rating as one of the top financial advisors in Ohio.

***Don't Miss: Top Financial Advisors in Kansas City, Leawood, and North Kansas City***

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## **Summit Financial Strategies Review**

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Relationships are central to the work that [Summit Financial Strategies](#) does. Their team of Ohio financial advisors puts sincere effort into initiating and cultivating relationships, developing custom financial plans that are tuned to the needs, goals, and dreams of their clients.

Summit Financial Strategies is a [fee-only](#) wealth management firm in Ohio.

## **Key Factors That Enabled Summit Financial Strategies to be Ranked as a Top Financial Advisor in Ohio**

### **Wealth Management Services**

This financial advisory firm in Ohio offers a wealth management service that evolves with the changing needs of its clients. They tailor the plan to a client's goals, and adjust it as the client gets closer and closer to achieving them.

During the first year with a new client, this wealth management firm in Ohio meets with them at least six times a year. Specific areas include:

- Data verification and cash flow review
- Retirement planning
- Asset allocation and portfolio development
- Portfolio implementation
- Account consolidation
- Investment recommendations and performance reviews
- College funding
- Tax planning
- Estate planning
- Tax managed rebalancing
- Insurance needs
- Policy reviews

### **Investment Advisory Services**

Summit Financial Strategies is a wealth management firm in Ohio that helps clients introduce discipline, strategy, and expertise to their investments.

During their first interaction with a client, this wealth management firm in Ohio collects the necessary data and discusses portfolio development. This conversation also touches on the importance of understanding comfort levels and risk tolerance.

Once a general outline for the portfolio is agreed upon, this team of financial advisors in Ohio implement the plan and regularly monitor it to verify that things remain on track.

This Ohio wealth management firm's investment advisory services include:

- Asset allocation and portfolio development

- Portfolio implementation
- Tax managed rebalancing
- Account consolidation
- Investment recommendations
- Performance reviews

## **Rating Summary**

For clients that are seasoned financial management professionals or for those who are just starting to get a handle on their finances, Summit Financial Strategies is a great financial planner in Columbus, Ohio to consider.

Not only does the firm offer enhanced financial management strategies, but they also boast a large team and a low ratio of clients to advisors, ensuring that each client gets the dedicated, one-on-one attention they need.

With a focus on maintaining positive, long-lasting relationships at the center of each service area, Summit Financial Strategies is one of the best financial advisors in Columbus, Ohio—and across the state—to consider partnering with this year.

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

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## **Truepoint Wealth Counsel Review**

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[Truepoint Wealth Management](#)'s mandate is to provide engaged, transparent financial advice.

As a [fee-only](#) financial advisor in Ohio, Truepoint offers a variety of wealth management services to their clients, including retirement planning, personal CFO services, and multi-generational family wealth planning.

### **Key Factors That Enabled Truepoint Wealth Counsel to be Ranked as a Top Financial Advisor in Ohio**

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

Part of finding the best Ohio financial advisor means looking for a firm that can continue to provide value as your financial situation fluctuates and grows.

As a top financial advisor in Ohio, Truepoint Wealth Counsel offers clients a range of expert financial services and challenges, including:

- **Investment Management**—Uses an intellectually honest, evidence-based philosophy as a foundation
- **Financial Planning**—Goal-focused, customized, long-term strategies
- **Tax Management**—Proactive, integrated planning to manage the impact of taxes
- **Estate Planning**—Focuses on providing comprehensive plans aligned with goals
- **Risk Management**—Helps clients assess their insurance coverage needs

### **Specific Client Needs**

For those that are hiring a financial planner in Ohio for the first time, it can be difficult to identify what types of services you need.

Truepoint Wealth Counsel makes it easy for new clients to assess their financial needs before they even walk through the door, providing detailed descriptions of common financial management needs for:

- Business Owners
- Retirement Planning
- Managing Inheritance
- Career Change
- Education Planning
- Children and Finance

Each section contains common wealth management questions and concrete examples of how the Ohio financial advisors at Truepoint Wealth Counsel can help clients overcome specific financial challenges.

### **Rating Summary**

With a fee-only structure and a fiduciary commitment, Truepoint Wealth Counsel provides their clients with the ideal financial planning relationship—clients can trust that their advisor will provide unbiased, transparent advice during every step of the way.

Truepoint Wealth Counsel also makes it easy for potential clients to evaluate their services by providing comprehensive, detailed descriptions of their services, earning the firm a spot among the best financial advisors in Ohio.

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## **Conclusion - Top 10 Best Financial Advisors in Ohio**

Whether you're looking for financial advisors in Cleveland, Cincinnati, Columbus, or any other city in the state, consider this article your starting point when looking for the best Ohio financial advisor for you.

By taking into account each firm's values, service offerings, expertise, and experience, use the review sections above to create your own personal list of what you consider to be the best wealth management firms in Ohio.

After that, contact each advisor in turn to set up a consultation. The good news is that most financial advisors in Ohio and elsewhere offer a free initial consultation.

While it may seem as though an initial consultation is an extraneous step, ensuring that you partner with the best financial planner in Ohio for your unique needs and goals could equal bountiful returns in the future.

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## Rate Table Disclaimer

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

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Image sources:

- <https://pixabay.com/en/cleveland-ohio-city-urban-1888370/>
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