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# **Top 9 Best Financial Advisors in Charlotte & Asheville, NC | 2018 Ranking**

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## **RANKING & REVIEWS BEST ASHEVILLE & CHARLOTTE FINANCIAL ADVISORS**

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### **2018 Ranking | How Do You Find a Reputable Financial Advisor in Charlotte or Asheville?**

Charlotte and Asheville are two areas in North Carolina where wealth is growing quickly, and there is an increasing need for Charlotte wealth management firms and Asheville wealth management firms.

Clients need a Charlotte financial advisor or an Asheville financial advisor who can help them make financially smart decisions that have the potential to positively impact them during their own life and generations of their family to come.

However, knowing where to start can, at times, seem insurmountable. As you try to find the best financial advisor in Charlotte or Asheville for you, how do you know where to start?

Our list of the best financial advisors in Charlotte, NC and Asheville, NC will provide you with a solid foundation, including a detailed overview of the firms that have outperformed the competition in terms of credentials, financial services, industry experience, expertise, and more.



*Award Emblem: Best 9 Financial Advisors in Charlotte & Asheville, NC*

## **Top 9 Best Financial Advisors in Charlotte and Asheville, NC | Brief Comparison & Ranking**

<b>Best Financial Advisors in Charlotte &amp; Asheville, NC</b>	<b>Highlighted Features</b>	<b>Ratings</b>
Alpha Financial Advisors, LLC	High standards of industry excellence	5
Altavista Wealth Management, Inc.	Women in Conversation series promotes financial literacy for women	5
Boys, Arnold & Company	Team-based approach	5
Keatley Wealth Management LLC	Woman-led and owned firm	5
Parsec Financial Inc.	Comprehensive financial planning	5

Ronald Blue Trust	Faith-based approach to financial services	5
Carroll Financial Associates, Inc.	Client-centric approach	5
Bragg Financial Advisors Inc.	Wide range of industry certifications & professional designations	3
Matrix Wealth Advisors Inc.	Experienced, credentialed team	3

*Table: Top 9 Best Financial Advisors in Charlotte & Asheville, NC | Above list is sorted by rating*

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## **Tips for Selecting the Best Financial Advisors in Asheville & Charlotte**

When it comes to choosing the best Charlotte financial advisor, there are plenty of firms to choose from. With so many options to consider, how can you narrow the search?

First, take a close look at what services are offered by wealth management firms in Charlotte, NC and Asheville, NC, and match those services up with your own personal financial goals.

Are you planning for retirement? Have you recently changed jobs? Do you have a recent inheritance or an impending divorce that will affect your financial future?

As you will see in the following reviews for financial advisors in Asheville, NC and Charlotte, NC, each firm specializes in varying areas of financial planning and wealth management.

If your needs are of a broader nature and you wish to have peace of mind through simple yet comprehensive financial planning, you may be well-suited with a financial advisor that offers a broader range of services.

Once you've narrowed down your choices to a select few of these top-ranking financial planners in Charlotte, NC and Asheville, NC, see if any of your selected advisors offer an introductory consultation session.

Whether it's a free or paid consultation, this can be a good way to "feel out" a prospective financial advisor before committing to their services for wealth management in Charlotte, NC or Asheville, NC.



*Best Financial Advisors in Charlotte, NC*

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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 Charlotte & Asheville**

Below, please find a detailed review of the best financial advisors in Charlotte and Asheville, NC. We have highlighted some of the factors that allowed these financial advisors in Charlotte and Asheville 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.

- [Alpha Financial Advisors, LLC](#)
- [Altavista Wealth Management, Inc.](#)
- [Boys, Arnold & Company](#)
- [Bragg Financial Advisors](#)
- [Carroll Financial Associates, Inc.](#)
- [Keatley Wealth Management](#)
- [Matrix Wealth Advisors, Inc.](#)
- [Parsec Financial, Inc.](#)
- [Ronald Blue Trust](#)

Click below for previous years' rankings:

- **2016 Review:** [Top 10 Best Financial Advisors in Charlotte](#)
- **2017 Review:** [Top 9 Best Financial Advisors in Charlotte](#)

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## Alpha Financial Advisors LLC Review

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As one of the top [fee-only](#) financial advisors in Charlotte, NC, [Alpha Financial Advisors](#) stands out for their unwavering commitment to providing objective advice that brings real value to the lives of their clients.

The firm views their relationships with clients as long-term partnerships, and they provide advice to their clients that allows them to follow their passions and achieve their personal goals.

### **Key Factors that Enabled Alpha Financial Advisors to Rank as a Top Financial Advisor in Charlotte, NC**

#### **A Personal Connection**

One of the things that set any firm apart is their approach. Central to the approach undertaken by Alpha is the concept of building a personal connection.

The objective is to develop a personal connection with each client, and part of that includes having an understanding of their value systems. By knowing what each individual client values, these Charlotte financial advisors can then build a wealth management plan based on those values.

This approach requires asking the right questions, listening and gathering facts of even the smallest of details about the client's individual situation.

## **High Standards of Excellence**

Part of what makes Alpha Financial a top financial advisor in Charlotte, NC is the firm's clear commitment to maintaining high standards of excellence.

With a fee-only structure and a fiduciary commitment, Alpha Financial maintains membership in the following industry organizations:

- National Association of Personal Financial Advisors (NAPFA)
- American Institute of CPAs (AICPA)

As a member of NAPFA and AICPA, Alpha Financial must maintain high quality standards, like comprehensive financial planning, continuing industry education, and more.

Uniquely, Alpha Financial also maintains a Client Advisory Board to further their dedication to excellence and superior client service.

Composed of 10 clients, members of the board serve for two years in rotating terms. Meetings are moderated by an independent third-party and are used to represent the voice of clients, addressing feedback and providing insight on critical firm decisions.

This level of commitment to client service is rarely seen in the industry, making Alpha Financial stand out among competing financial advisors in Charlotte, NC.

## **Rating Summary**

As a top financial advisor in Charlotte, Alpha Financial Advisors goes the extra mile to ensure that clients are well-taken care of, forging personal connections to understand each individual's financial attitudes and habits.

Combined with a fee-only structure, comprehensive services, and a commitment to industry excellence, Alpha Financial is one of the best financial advisors in Charlotte to consider partnering with this year.

***See Also: Best Financial Advisors in Philadelphia, PA***

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## **Altavista Wealth Management Review**

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With offices in both Asheville and Charlotte, [Altavista Wealth Management](#) offers services to individuals, families, and institutions.

As one of the top wealth management firms in Charlotte, NC and Asheville, Altavista delivers a wide variety of fiduciary and investment management services to help clients in every area of their financial life.

While it is likely that Altavista Wealth Management uses a fee-based pricing structure, our review was unable to concretely verify this. As always, we recommend confirming the pricing structure before signing up with an Asheville or Charlotte financial advisor.

## **Key Factors that Enabled Altavista Wealth Management to Rank as a Top Charlotte & Asheville Financial Advisor**

### **Comprehensive Financial Services**

Altavista Wealth offers a wide-range of investment management and fiduciary services. Through careful planning, they can assist you in managing all aspects of your financial life. Services include:

- **Financial Planning**—Integrated with investment management and fiduciary services as an ongoing process
- **Portfolio Management**—Highly customized to take each client's unique financial needs and goals in mind
- **Asset Deployment and Allocation**—Goal is to reduce risk and enhance the ultimate purchasing power of assets held
- **Trust Administration and Fiduciary Services**—Extensive experience in the administration of trusts and estates, including a partnership with First Hope Bank
- **Family Office Services**—Includes family governance, lifestyle services, educating heirs, and more
- **Third-Party Services for Legal and Accounting Practices**—Private label investment and fiduciary services for attorneys and accountants

### **Women in Conversation**

In partnership with the Osher Lifelong Learning Institute (OLLI) and UNC-Asheville, Altavista Wealth offers a four-class series called Financial Conversations for Women.

By exploring the challenges faced by women of today while creating a common space for conversation and building a strong community, Women in Conversation is a focused series with a range of topics.

The group discusses anything from health and long-term care to investments and estate planning among other topics.

With a casual, engaging, and fun atmosphere, Women in Conversation is a unique way for Altavista Wealth to reach out to their clients and to the community, making the firm one of the top financial advisors in Asheville, NC.

## **Managing Your Portfolio**

The team of Asheville and Charlotte financial advisors at Altavista Wealth use highly customized services and a solid management foundation to create an effective investment portfolio for each client.

To create customized portfolios for their clients, these financial advisors in Asheville, NC take the following factors into account:

- Tax status
- Income needs
- Investment objectives
- Estate planning considerations
- Investments held outside the portfolio
- Other unique circumstances

Altavista Wealth utilizes a risk-controlled approach that they believe enhances return value. They include both U.S. and foreign stocks (large and small capital) as well as foreign shares, real estate, government bonds, and more.



*Top Financial Advisors in Asheville, NC*



## **Rating Summary**

As a top financial advisor in Charlotte and Asheville, Altavista Wealth Management can provide comprehensive financial services for clients over the long-term, adjusting their plan as goals and life situations change.

Their focus on engaging women in financial conversations also makes the firm stand out among competing Asheville and Charlotte financial advisors, demonstrating a dedication to supporting their community through financial literacy.

With comprehensive services and a fiduciary foundation, Altavista Wealth Management is a top financial planner in Charlotte, NC, and Asheville, NC to consider partnering with this year.

***Don't Miss: Top Financial Advisors in Cincinnati, Ohio***

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## **Boys, Arnold & Company Review**

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Located in Asheville and Hilton Head, [Boys, Arnold & Company](#) is comprised of a team of highly committed individuals who offer financial planning and wealth management services to affluent individuals, families, and institutions.

As a top [fee-only](#) financial advisor in Asheville, NC, the firm is completely employee [owned](#), and led by a team of senior staff who have worked together for 25 years.

### **Key Factors that Enabled Boys, Arnold & Company to Rank as a Top Financial Advisor in Asheville, NC**

#### **A Fee-Only Provider**

Staying true to their commitment to their clients, Boys, Arnold & Company is a Registered Investment Advisor (RIA) and is 100% employee owned.

They do not believe in selling unnecessary proprietary products to garner a commission from their clients. Instead, they operate on a fee-only schedule, and all fees are clearly outlined.

Since this leading Asheville financial advisor firm is fee-only, they have a deep interest in serving the needs of clients ahead of all else, and they only charge for advice and ongoing wealth management.

## **Services for Families and Individuals**

Wealth management services for individuals and families alike are backed by the unbiased, highly-credentialed expertise of Boys, Arnold & Company's wealth counselors.

A broad range of capabilities is explored to create a unique and fully-customized strategy that will meet your needs today and beyond. Services include:

- **Comprehensive Financial Planning**—Your Asheville financial advisor will create a roadmap to the future for long-term success.
- **Investment Counsel**—Reap the benefits of an objective, third-party perspective.
- **Portfolio Management**—Explore all investment options and create a strategy that suits your needs.
- **Trust Services:** Backed by their independent, wholly-owned subsidiary, all administrative financial duties can be trusted to your Asheville financial advisor.

## **Rating Summary**

Along with comprehensive financial services for families, individuals, and businesses, part of what makes Boys, Arnold & Company stand out as a top financial advisor in Asheville, NC is their team-based approach.

Each client benefits from the collective expertise of an investment counselor, an account administrator, and committees for financial planning and investments, providing a truly comprehensive experience.

With a fee-only structure, a fiduciary commitment, a team-based approach, and comprehensive services, Boys, Arnold & Company is a top Asheville financial advisor to consider partnering with this year.

***Related: Top Financial Advisors in Tampa, St. Petersburg, and Palm Harbor, Florida***

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## **Bragg Financial Advisors Review**

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[Bragg Financial Advisors](#) is a longstanding firm offering wealth management in Charlotte, NC with a history that goes back more than 50 years.

While Bragg Financial Advisors is a [fee-based](#) financial advisor in Charlotte, they were included because of their longstanding reputation for excellence, and their all-around superior client service.

The firm works to ensure that they remain objective and are focused on providing service and advice with the client's best interest as a central consideration.

## **Key Factors that Enabled Bragg Financial Advisors to Rank as One of the Top Financial Advisors in Charlotte, NC**

### **Degrees and Designations**

Bragg is well-known for expert wealth management in Charlotte, NC, and their team of professionals has reputable degrees and designations that ensure they're the best at what they do.

For example, three members of the firm hold their MBA, while six advisors are Certified Financial Planners (CFP). To be a CFP, an individual is required to meet rigorous standards that include an examination, experience, and a commitment to maintain the highest ethical standards. These professionals are also required to obtain 30 hours of continuing education every two years.

Several members of this top wealth advisory firm in Charlotte also have their Chartered Financial Analyst (CFA) certification, are CPAs, Certified Fund Specialists, and Accredited Investment Fiduciaries.

### **Investment Philosophy**

As one of the best financial advisors in Charlotte, Bragg Investment Advisors, follows a strictly defined investment philosophy and creates portfolios that include an optimal combination of stocks, bonds, and mutual funds.

The overall concepts guiding their investment philosophy include diversification, risk-adjusted returns, long-term holding and fundamental analysis.

The Bragg Financial Investment Policy Committee, which includes research analysts and portfolio managers, creates the Investment Strategy and Target Portfolio Allocations utilized by the firm.

Then, based on these concepts, each client portfolio is uniquely created and personally managed, with allocations reflecting the individual client's risk tolerance, liquidity requirements, and tax situation.



*Bragg Financial Advisors - Charlotte, NC*

### **Rating Summary**

Clients will find that partnering with Bragg Investment Advisors provides access to a diverse, comprehensive, and fully accredited team of investment and financial planning experts.

However, potential clients should note that Bragg Investment Advisors focuses primarily on providing investment management and retirement planning services, rather than comprehensive, day-to-day financial planning.

Compared to competing Charlotte financial advisors, the lack of comprehensive financial planning services puts the firm at a slight disadvantage, earning Bragg Investment Advisors a 3-star rating overall.

Still, for clients that want expert retirement planning, trust and estate strategies, and investment management, Bragg Investment Advisors provides a strong foundation of industry experience and accreditation, solidifying the firm as one of the best financial advisors in Charlotte, NC.

***Popular Article: Best Financial Advisors in Pittsburgh, Pennsylvania***

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## **Carroll Financial Associates, Inc. Review**

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Founded in 1980, [Carroll Financial Associates, Inc.](#) has operated on the same simple, client-centric premise for nearly four decades: “The best interest of the client is the only interest that matters.”

Although Carroll Financial is a [fee-based](#) firm, we have included them on this list of the best financial advisors in Charlotte for their fiduciary commitment, wide range of services, and client-centric values.

## **Key Factors that Enabled Carroll Financial Associates to Rank as One of the Best Wealth Management Firms in Charlotte, NC**

### **Client-Centric Approach**

At Carroll Financial, all advisors are held to the fiduciary standard, meaning that advice must be provided without bias and in the best interest of the client. This is a key element for any financial advisor in Charlotte, NC, but particularly when it comes to fee-based advisors.

With a fiduciary commitment, clients can rest assured that their Charlotte financial advisor will only make recommendations that will truly benefit their needs, rather than the needs of the firm.

To further develop trust within the client-advisor relationship, Carroll Financial operates on a series of integral values, called The Eight C's:

- Client
- Commitment
- Consistency
- Customization
- Communication
- Character
- Common Sense
- Community

### **Comprehensive Services**

As a top financial advisor in Charlotte, Carroll Financial offers a wide range of financial planning and wealth management services to their clients, including:

- Retirement Planning
- Family Financial Planning
- Estate Planning
- Wealth Management
- 401k Advice
- College Planning
- Financial Assessment

Uniquely, Carroll Financial also offers Financial Planning for Physicians, providing services and pricing catered to the financial needs of physicians. The firm is an approved member of the Physician's Financial Partners program, offered through AMA Insurance Agency.



*Carroll Financial Associates*

### **Rating Summary**

As a fee-based firm with a strong fiduciary commitment, Carroll Financial Advisors is a competitive choice among Charlotte financial advisors. The firm also adheres to a client-centric set of values, further strengthening their motto to put the client's needs first at all times.

With a comprehensive suite of services—and even services specifically tailored for physicians—Carroll Financial Advisors is one of the best Charlotte wealth management firms to consider partnering with this year.

***Read More: Top Financial Advisers in Leeds, UK***

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## **Keatley Wealth Management Review**

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A fee-only financial management firm in Charlotte, [Keatley Wealth Management](#) strives to provide clients with an experience that's different from what they would normally think of with Wall Street brokerages or big banks.

As with many of the top financial management firms in Charlotte, NC, Keatley Wealth Management is a fiduciary, providing objective advice to each and every client.

## **Key Factors that Enabled Keatley Wealth Management to Rank as a Top Financial Advisor in Charlotte, NC**

### **Woman-Led Team**

The financial industry is one that is historically underrepresented by women—but as the number of female executives and business owners continues to grow and expand, it's important that successful women have Charlotte financial planners that understand their unique needs.

Many of these needs include planning for a longer average lifespan, a greater likelihood of taking time off from work, planning alongside the gender pay gap, and balancing financial management with having children.

Keatley stands apart from competing Charlotte wealth management firms—and the larger financial industry—as it is owned and operated by women.

For women that want to take control of their finances, Keatley Wealth Management is a great Charlotte financial advisor to consider, as the team of financial advisors is likely to be uniquely poised to address the financial concerns of women.



Karen Keatley,  
MBA, CFA, CFP®  
President and Chief  
Investment Officer



Jenny I. Martella,  
MBA, CFP®  
Director of Financial  
Planning



Amy Lowder  
Office Manager



Erica J. Yount,  
CFA  
Portfolio Manager

*Keatley Wealth Management*

### **Client-Centric Approach**

As a top Charlotte wealth management firm, Keatley not only serves their clients as a fiduciary, but they also provide customized plans and solutions for each unique financial situation.

The following outlines how the firm approaches each client engagement:

- These financial advisors in Charlotte, NC start by creating an Investment Policy Statement to establish objectives, define asset allocation policy, and highlight potential constraints.
- As a fee-only firm, Keatley can look at an incredibly broad and diverse range of investment options and choose what's best for the client, with an emphasis on mutual funds and ETFs.
- Ongoing monitoring and rebalancing helps ensure portfolios meet an optimal return level. Rebalancing occurs when necessary to ensure allocations stay within the agreed-upon limits.
- Finally, the Keatley process uses a Reality Check, where performance is measured against commercial market indices. Clients of this top Charlotte wealth management firm receive easy-to-understand quarterly reports.

### **Rating Summary**

While Keatley Wealth Management may be one of the smaller firms on our list, these financial advisors in Charlotte, NC bring a large amount of value to their clients.

As a fee-only firm with a fiduciary commitment, Keatley represents the golden standard of financial advisement—unbiased, transparent, and always in the client's best interest.

With a comprehensive approach and a high standard of service, Keatley Wealth Management is one of the best financial advisors in Charlotte, NC to consider partnering with this year.

***Related: Best Financial Advisors in Calgary, Alberta***

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## **Matrix Wealth Advisors, Inc. Review**

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At [Matrix Wealth Advisors, Inc.](#), they believe that “Planning is for Life.” At its core, financial management is more than numbers: it’s an ever-changing mix of dreams, values, and family goals.

For these reasons, Matrix Wealth stands as a trusted, independent, [fee-only](#) wealth management firm which offers financial planning and investment management services to a wide variety of clients.



## **Key Factors that Enabled Matrix Wealth Advisors, Inc. to Rank as a Best Charlotte Wealth Management Firm**

### **Experienced Team**

As one of the top Charlotte wealth management firms, the team at Matrix Wealth Advisors brings a wide range of experience and industry accreditations.

Collectively, the team has nearly a century of experience in financial planning and investment management, giving these financial advisors in Charlotte, NC a solid foundation to tackle a variety of financial challenges.

Additionally, the Matrix Wealth Advisors team also carry a range of industry designations and accreditations, including:

- CIMA®—Certified Investment Management Analyst
- CFP®—Certified Financial Planner
- CPA—Certified Public Accountant
- PFS—Personal Financial Specialist
- CTFA—Certified Trust and Financial Advisor
- APMA®—Accredited Portfolio Management Advisor

### **Investment Management**

For this top financial advisor in Charlotte, portfolio construction is the single most important element of a successful financial plan. Clients that partner with Matrix Wealth Advisors can expect their advisor to:

- Conduct in-depth analysis of goals and risk tolerance
- Develop a statistical profile to match individual needs
- Document overall policy with an Investment Policy Statement
- Recommend an appropriate asset allocation
- Select appropriate securities to invest
- Monitor performance and provide quarterly reports
- Schedule regular meetings to discuss portfolio performance
- Recommend any necessary adjustments over time

### **Rating Summary**

Although the team at Matrix Wealth Advisors may be small in comparison to larger Charlotte financial advisory firms, their wide range of experience and depth of industry accreditation ensures that these advisors can adeptly handle a variety of financial challenges.

Although their investment process is thoroughly explained, clients may have a difficult time evaluating their financial planning services, as this area of service has little detail.

Additionally, browsing through the firm's website can be somewhat challenging, particularly in comparison to competing Charlotte financial advisors.

By updating their website and adding more detail about their financial planning services, Matrix Wealth Advisors could easily improve both their value proposition to clients and their rating as a top financial advisor in Charlotte, NC.

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

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## **Parsec Financial, Inc. Review**

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With offices in both Charlotte and Asheville, [Parsec Financial, Inc.](#) is an investment and wealth management firm founded in 1980.

This [fee-only](#) financial advisor in Charlotte and Asheville helps clients meet their long-term goals through the recommendation of sound investment strategies based on personal requirements and situations.

### **Key Factors that Enabled Parsec Financial, Inc. to Rank as a Best Financial Advisor in Charlotte and Asheville**

#### **Emerging Wealth**

Clients that are just beginning to accumulate wealth will have much different financial needs and challenges, like balancing a career, paying student debt, saving for a first home, or putting money aside for a child's education.

For these clients, Parsec Financial offers their Emerging Wealth services, focused largely on financial planning and as-needed investment management. With fees based on income, these financial planners in Charlotte, NC can provide services like:

- Investment and allocation advice
- Student loan repayment strategies
- Estate planning goals
- Budgeting and cash flow planning
- Major expense purchase advice
- Education funding and planning
- Retirement savings strategies
- Recommendations on insurance
- Consulting on financial topics related to business, homeownership, and more

## **The Investment Planning Process**

As a top Asheville and Charlotte financial advisor, Parsec Financial uses a comprehensive, three-pronged approach to investment planning, detailed below.

### Long-Term Investing

Parsec Financial believes that investments should be made for the long term, preferably more than 10 years. This critical piece of the investment puzzle allows the long-term characteristics of assets to surface.

### Diversification

A diverse portfolio is a healthy portfolio. As a whole, these Asheville and Charlotte financial advisors believe that the design itself is more important than the selection of a particular security.

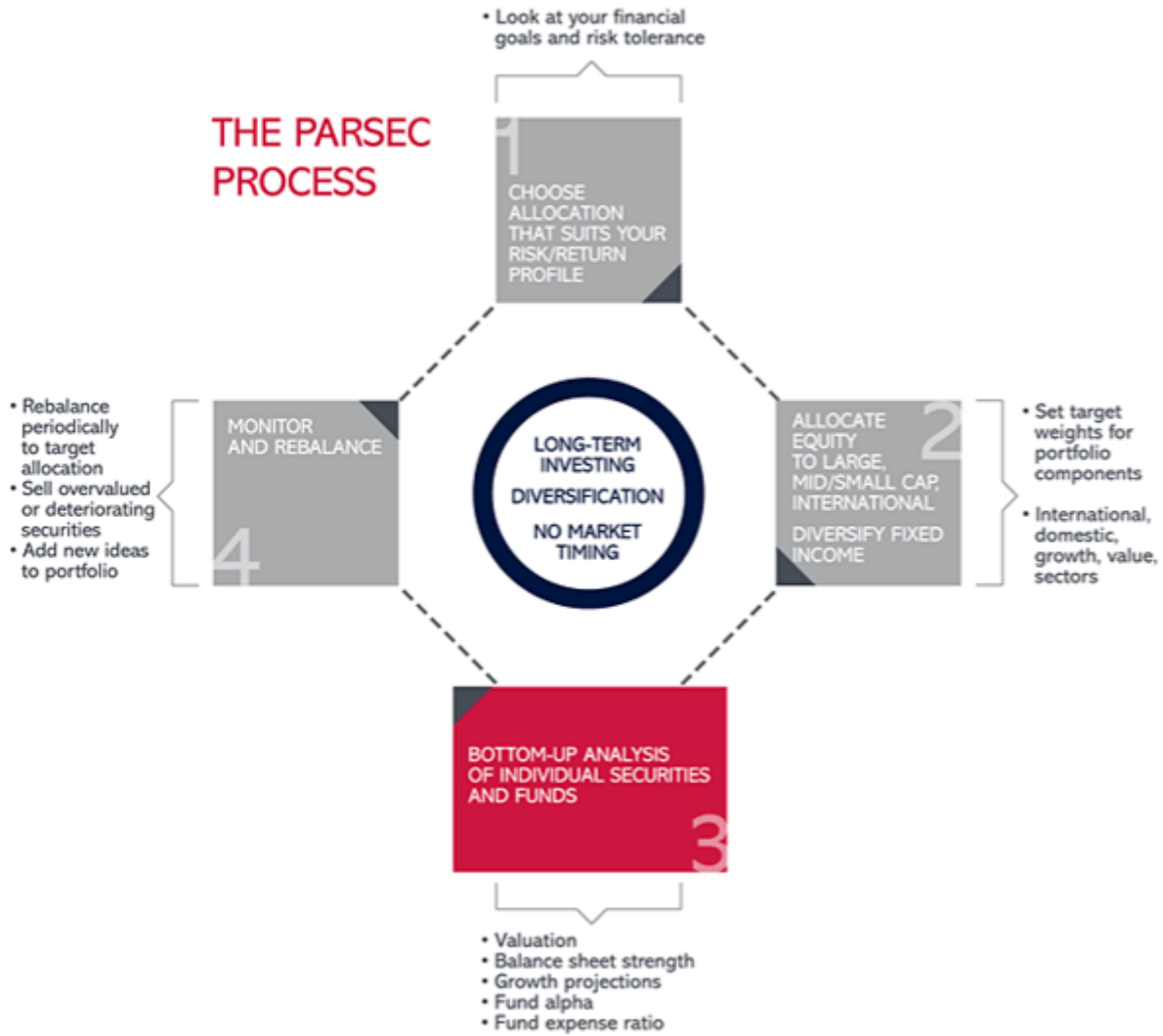
Parsec Financial will create a balance between growth and value companies, large and small companies, as well as international securities.

### No Market Timing

Contrary to popular opinion, Parsec Financial strongly believes investors should veer away from market timing.

Simply put, timing the purchase or sale of a security based on an attempt to guess which direction the market will go is highly unlikely to increase overall return.

In addition to a full-fledged investment plan that correlates to other wealth management services, Parsec Financial offers an opportunity called [Parsec Portfolios](#) that allows clients to utilize investment-only services.



*Parsec Financial – The Parsec Process*

## **Rating Summary**

As a top financial advisor in Charlotte and Asheville, NC, Parsec Financial provides clients with a comprehensive process for both investment management and financial planning, making it possible to receive long-term financial advice for a variety of needs.

Additionally, their fee-only pricing structure ensures transparency and builds trust between each Charlotte financial advisor and their clients, solidifying the firm's 5-star rating as a top financial advisor in Charlotte and Asheville.

***Popular Article: Best Financial Advisors in Omaha, Nebraska***

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## Ronald Blue Trust Review

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Serving individuals and families from all ends of the wealth spectrum, [Ronald Blue Trust](#) is a fee-only financial advisor in Charlotte, NC.

Ronald Blue Trust currently has over \$8 billion in assets under management, serving over 7,000 clients across the country.

Uniquely, the firm takes a [faith-based approach](#) to financial planning, “believing that biblical principles are the best guide for making wise financial decisions.”

### **Key Factors that Enabled This Firm to Rank as One of the Top Financial Advisors in Charlotte, NC**

#### **Client Divisions**

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

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

These divisions not only enable the Charlotte financial planners at Ronald Blue Trust to reach a wide range of clients, but they also lend a competitive edge to the firm, providing services that many financial advisors in Charlotte miss.

#### **Faith-Based Approach**

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

For these Charlotte financial advisors, enrichment can be attained by infusing financial planning and investment management with biblical principles, ultimately leaving a legacy defined by “[financial, spiritual, and social capital](#).”

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

### **Rating Summary**

For clients that want their Charlotte financial advisor to share their principles—and put them in practice through expert financial management—Ronald Blue Trust is a great fit.

Additionally, their separation of client divisions enhances both the firm’s reach and value, as they can serve a wider range of clients underneath the expertise of a dedicated, focused team.

With a unique, faith-based approach and the ability to serve clients of all asset sizes, Ronald Blue Trust is one of the top financial advisors in Charlotte, NC to consider partnering with this year.

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## **Conclusion – Best Financial Advisors in Charlotte & Asheville, NC**

As you learn about each of the top financial advisors in and around Charlotte, and Asheville, NC, we hope that you have developed a good idea of what services you want and what services each financial advisor has to offer.

Whether you are interested in creating an investment portfolio, planning for your retirement, or simply want to get a handle on your wealth before it dwindles away, there is an Asheville or Charlotte financial advisor for you.

We always recommend that you make a list of your wants and needs, making it easier to match those needs up with the services of a financial advisor in Charlotte or Asheville.

Once you narrow down your options to a select one or two advisors, check to see if they offer any complimentary services such as an initial interview or consultation.

You’ve worked hard to get to where you are; you deserve to have a trusted professional who will stand by your side and provide excellent financial management.

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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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