

Top 10 Best Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota)

2016 RANKING OF TOP WEALTH ADVISORS

Finding the Top Financial Advisor in Minneapolis, St. Paul, and Edina (Minnesota)

Working with the right wealth manager, investment advisor, or financial planner in Minneapolis, St. Paul, Edina, or any other city in Minnesota, has become all the more important over the past several years.

Struggling global economies, a U.S. economy that's only just started to recover from the 2008 financial industry shock, and growing equity market volatility makes it imperative that savers and investors seek professional advice for their personal portfolios.

The challenge, however, is that—because of the diverse range of services clients require and the broad spectrum of financial strategies available today—it has become increasingly challenging to identify wealth managers in Minneapolis who fit the bill perfectly.

That's where AdvisoryHQ comes in.

About AdvisoryHQ

AdvisoryHQ News was launched in March of 2015 and has since become one of the [fastest-growing review and ranking media](#) for the financial advisory sector.

AdvisoryHQ conducts extensive research to identify and rank the best investment managers, financial advisors, and financial planners across the U.S. and the U.K.

Our reviews are then **published for free**, and we do not accept any compensation for these reviews. This is to ensure the highest level of objectivity and unbiased editorial reviews.

Don't Miss: High Yield Bank Accounts



AdvisoryHQ's List of the Best Rated Financial Advisors in Minneapolis, St. Paul, and Edina

- [**Advanced Wealth Management Group**](#)
- [**Birchwood Financial Partners**](#)
- [**Financial Perspectives**](#)
- [**Flourish Wealth Management**](#)
- [**Pitzl Financial**](#)
- [**PrairieView Partners**](#)
- [**SilverOak Wealth Management LLC**](#)
- [**Tealwood Asset Management, Inc**](#)
- [**Wade Financial Group**](#)
- [**White Oaks Wealth Advisors**](#)

List is sorted alphabetically (click any of the names above to go directly to the detailed review section for that advisor)

Top 10 Best Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota)

Firm	Location
Advanced Wealth Management Group	Minneapolis
Birchwood Financial Partners	Edina
Financial Perspectives	Minneapolis
Flourish Wealth Management	Edina
Pitzl Financial	Minneapolis – St. Paul
PrairieView Partners	St. Paul
SilverOak Wealth Management, Inc.	Edina
Tealwood Asset Management, Inc.	Minneapolis
Wade Financial Group	Minneapolis
White Oaks Wealth Advisors	Minneapolis

Methodology: Finding the Top Wealth Management Firms in Minnesota

What methodology did we use in selecting this list of best Minneapolis financial advisors and top wealth managers in Minnesota?

Using publicly available sources, AdvisoryHQ identified a wide range of financial advisors, asset and wealth managers, and financial planners that provide services in Minneapolis and surrounding areas.

We then applied AdvisoryHQ's **Breakthrough Selection Methodology** to identify the final list of top advisors that provide services to communities in and around Minneapolis, Minnesota.



Detailed Review – Top Ranking Financial Advisors in Minnesota

Below, please find the detailed review of each firm on our list of top advisors and financial planners in Minneapolis, St. Paul, and Edina. We have highlighted some of the factors that allowed these Minnesota financial advisory firms to score so high in our selection ranking.

Advanced Wealth Management Group Review

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As an independent financial advisor in Minneapolis, [Advanced Wealth Management Group](#) pride themselves on the fact that they operate more as “financial coaches” than as salesmen of investment or wealth management products and services. It is no wonder then, that educating, coaching, and empowering clients with knowledge and advice is at the heart of the firm’s practice.

As a full-service Minneapolis financial planner, the company’s services include:

Investing:

- Investment analysis and management
- Portfolio design and asset allocation
- Lump sum distributions
- College funding
- 401(k) allocations and rollovers
- Group retirement plans/401(k)s

Wealth Coaching/Planning:

- Financial planning
- Retirement income planning
- Income tax planning
- Tax-efficient investment planning
- Risk management and cash flow planning
- Business succession planning
- Estate planning fundamentals

Insurance:

- Life insurance
- Disability insurance
- Long-term care insurance
- Employment benefits

While Advanced Wealth Management Group’s clients come from a broad spectrum of society, they all desire a trusted partner to handle their financial affairs. As an independent financial advisor in Minneapolis, the company has the industry experts and experience to take on this responsibility. As a result, a host of client referrals from

existing satisfied clients continues to keep the company growing and expanding.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

The following factors enabled Advanced Wealth Management Group to be rated as one of 2016's top 10 financial advisory firms in Minneapolis.

Independent Advice:

By operating as independent Minneapolis financial advisors, Advanced Wealth Management Group is able to offer its clients a wide variety of financial services and investment vehicles that meet each client's unique needs. The company does not sell anything; its independent status allows it to review the entire spectrum of solutions for its clients.

Emphasis on Client Education:

As a top-ranked financial advisor in Minneapolis, Advanced Wealth Management Group has focused on delivering customized wealth management advice, coaching, and solutions to its clients. While many peers in the industry sell specific financial products or services, their emphasis on coaching makes the company stand out.

Focus on Life-Transition:

The Advanced Wealth Management team specializes in empowering clients with the advice, tools and capabilities required to manage some of the most significant life-changing events like retirement, changes in jobs, deaths in the family, separations, and disposing of a business.

Unique Wealth Coaching Process:

One of the key features that makes Advanced Wealth Management a top Minneapolis wealth management firm is its proprietary wealth coaching process known as The Advanced Wealth Optimization System™.

Goals-based Portfolio Management:

Client portfolios are strategically designed based on individualized financial needs and requirements. As one of the top ranked wealth managers in Minneapolis, the Advanced team focuses on delivering

consistent, goal-based results across portfolios, using a mix of active and passive investment management strategies.



A product of over 30 years of collective experience, this process is used to create truly unique wealth management solutions for clients.

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Birchwood Financial Partners Review

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Have you saved enough for your retirement? Do you know if your family's future is secure? How much do you need to save to fulfill a particular life goal?

If you are like many of [Birchwood Financial Partners'](#) clients, then this fee only-based firm might be able to answer all of your financial planning questions.

Founded in 1990 by Kay Kramer, Edina-based Birchwood is rated one of the leading financial advisors in Minneapolis as of this writing. Their primary objective is to effect quality-of-life improvements among their clients. The experienced advisory team does this by helping clients identify the interaction of money with clients' personal and lifestyle ambitions and goals, and then designing personalized financial plans around those interactions.

The firm and its advisors bring together a diverse set of experiences and skills to deliver a wide-ranging set of services to its clients, including:

- Retirement planning
- Estate planning
- Investment management
- Cash flow and budgeting
- Tax planning
- Insurance review
- Charitable giving strategies
- Education planning

Birchwood's advisory team comprises of individuals with industry certification that includes Certified Financial Planner™ professionals, Chartered Advisor in Philanthropy® professionals and Chartered Financial Analysts, among others.

As members of a top-performing team of financial planners in Minneapolis, individual advisors have been recognized by their peers and the industry as a whole through awards such as Five Star Professional and Finance & Commerce Top Women in Finance awards.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

The following factors enabled Birchwood Financial Partners to be included as one of 2016's top 10 financial advisory firms in Minneapolis.

Fee-only Advisory:

As a leading Minneapolis financial advisor, Edina-based Birchwood is a fee-only based advisory firm whose fees are based on the value of the assets its advisors manage for each client. This means that, in order for the firm to be successful and generate more revenue, it must ensure that client portfolios are doing well and thriving. No conflict of interest there!

Support for High Net-worth Clients:

As a general rule, Birchwood Financial Partners supports clients with investable assets of at least \$1,000,000 or more. However, where necessary, certain exceptions to this rule may be made.

Holistic Financial Planning:

Birchwood is a Minneapolis financial planner that believes in looking at financial planning more holistically than simply through the lens of money. The company's philosophy of "Whole Life Planning" encourages a much broader look, which includes looking at life goals, personal and family values, success, and security, when building personalized financial plans for its clients.

Diverse Client Base:

As a dynamic wealth manager in Edina and broader Minneapolis, Birchwood advises an ideologically diverse client base through an equally diverse and dynamic team of advisors.

A Full-service Firm:

As a well-established financial advisor in Minneapolis, Birchwood Financial Partners extends the range of its services by helping clients communicate with other key professional service providers, where required, including lawyers, accountants, and insurance professionals. This approach ensures the consistent implementation of the clients' financial plan.

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Financial Perspectives Review

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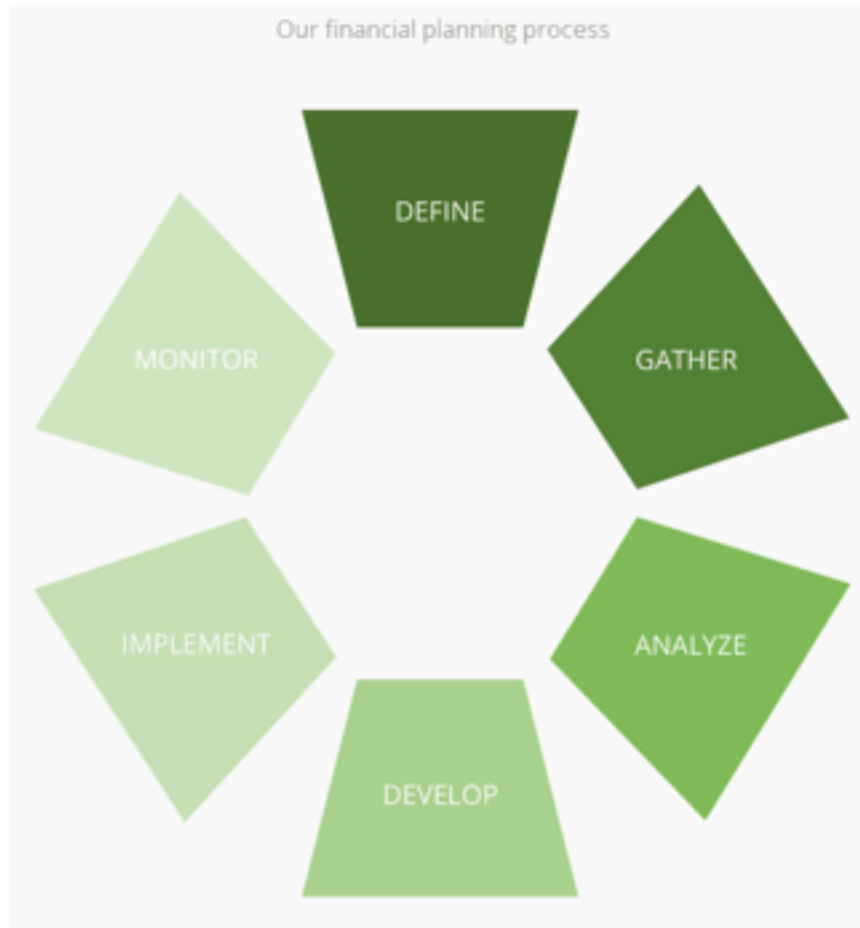
Financial Perspectives is a financial planner in Minneapolis, with offices also in Los Angeles, which offers a full-service wealth management experience to its clients. The company was founded in 1985 by Michael T. Dugan, who was a passionate believer that clients are entitled to receive financial advice and guidance from a team in whom they can trust.

Today Michael's brother Dan, the successor to the role of company president, continues that mission to offer the firm's clients a holistic array of financial planning and wealth management services that will enable them to realize their financial goals.

The company's service portfolio covers:

- Investments
- Insurance
- Taxes
- Retirement
- Estate planning
- Philanthropy

As a leading Minneapolis financial advisor with over three decades of industry experience, the company has perfected a financial planning process for delivering personalized planning and advisory services to its clients.



The hallmarks of the process are to listen carefully to client needs, develop and implement unique financial plans that meet those needs, monitor the plan, and communicate with clients on a regular basis.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

The following factors are what led us to add Financial Perspectives to our list as one of 2016's top 10 financial advisory firms in Minneapolis and its surrounding areas.

Independent Investment Advisory Services:

The company operates as a U.S. Securities and Exchange Commission (SEC)-registered investment advisory firm in Minneapolis and Los Angeles. This means that the firm is legally bound to offer independent, unbiased advice to its clients.

Family-run Business Values:

As a family-run financial advisor in Minneapolis and Los Angeles, Financial Perspectives remains committed to the values espoused by its founder back in 1985. These include:

- Passion
- Integrity
- Openness
- Interdependence
- Focus
- Success

It is these principles that have helped the company evolve into a firm of top Minneapolis financial advisors.

Client-focused:

Clients looking for a financial advisor in Minneapolis, Los Angeles and neighboring areas, with a client-centric mandate, will find an ideal partner in Financial Perspectives. One of the tenets of the firm's mission statement is to "Be client obsessed," which leaves no doubt about where the primary focus of its advisors will lay.

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Flourish Wealth Management Review

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Flourish Wealth Management is an Edina-based wealth manager in the Minneapolis area. The company's primary objective is to offer clients a holistic planning environment, wherein its advisors can deliver personalized investment and wealth management solutions by aligning clients' financial resources with their goals and values.

Operating as an SEC-registered investment advisory firm to clients in Minneapolis and nearby suburbs, Flourish Wealth Management delivers wealth management and investment advisory services primarily to individuals and families.

Clients generally have a minimum of \$1,000,000 in investable assets to receive comprehensive investment and wealth management services. A fee-only advisory, the company's fees start at 1% of the value of the invested portfolio, with a declining rate as the value of the assets increase. The minimum annual advisory fee charged is \$10,000.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

The following characteristics enabled Flourish Wealth Management to be ranked as one of 2016's top 10 financial advisory firms in Minneapolis and nearby areas.

Independent Fee-only Advisor:

Edina-based Flourish Wealth Management is an independent, fee-only financial advisor to clients in Minneapolis and nearby suburbs. As such, the firm's advisors do not receive referral fees, commissions or other forms of compensation from third-parties, which lets the company independently evaluate the merits of products and services it recommends to its clients.

Registered Investment Advisor:

As an SEC-registered investment advisory firm in Minneapolis, Flourish Wealth Management acts as an investment fiduciary to its clients. This puts a binding legal responsibility on the firm and its advisors to always act in the best interest of clients.

Focus on Women's Wealth Management Needs:

The firm offers a unique set of investment and wealth management and advisory services that focuses on the needs of female clients. From women in transition (separations, divorce, loss of a loved one), to female executives and independent business owners, Flourish Wealth Management has built its advisory capabilities to address distinctive financial needs of women.

Strong Alliances/Partnerships:

As a top-ranked financial advisor in the Minneapolis area, Edina-based Flourish Wealth Management leverages its strategic alliance with BAM Advisor Services, LLC to deliver value-added benefits to its clients. As part of a 140+ member network, the BMA partnership allows the company to operate independently while taking advantage of collective synergies—including cost-effective investment products and services, cutting-edge technology, and highly effective back-office support—for its clients.

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Pitzl Financial Review

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Pitzl Financial is a wealth manager and financial advisor in St. Paul, Minnesota, that believes in blending objective financial planning with investment management discipline to help clients preserve, protect, and enhance their wealth through various stages of their lives.

As one of the top wealth managers in Minneapolis, the Pitzl team believes that money should not be the central focus of financial decision-making; rather, the achievement of one's life aspirations should drive the planning process.

While operating as an independent wealth advisory firm, Pitzl Financial is part of the BAM Alliance, a network of like-minded, independent advisors who collectively manage over \$26 billion in client assets. This

alliance enables Pitzl clients to benefit from a wealth of synergies which result in evidence-based, holistic, and transparent advice.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

The following key considerations allowed Pitzl Financial to make it into our list of 2016's top 10 financial advisory firms in St. Paul, Minneapolis, and nearby areas.

Independent, Fee-only Advisors:

As a St. Paul-based, fee-only investment manager and financial planner, the company holds itself fully accountable to its clients for fees charged to them. The firm does not sell any products, nor does it receive any referral fees from other professionals.

Fiduciaries:

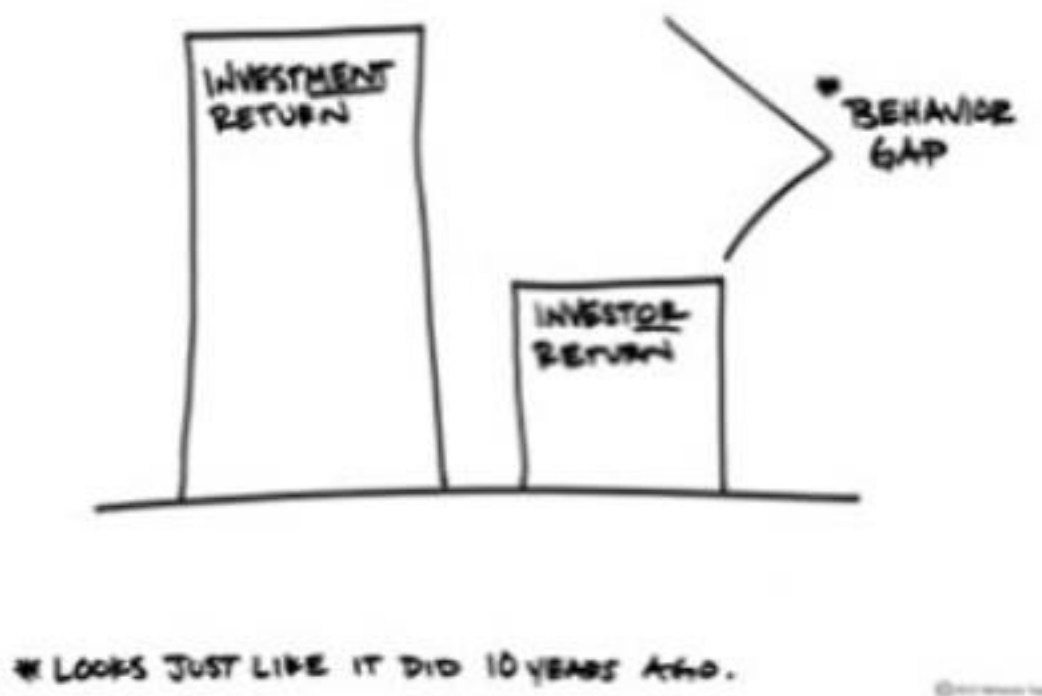
As a top-rated wealth management firm, Pitzl Financial acts as fiduciaries to its clients. This means the advice rendered by the firm and its team of advisors is always in the best interest of the client, without any conflict of interest or personal gain by any other parties (especially the firm and its advisors).

Unique “Your Personal Boardroom™” Approach:

Pitzl Financial takes a unique, corporate board-like approach to governing and managing their clients' wealth. “Your Personal Boardroom™” is their answer to empowering clients with CEO/Chairperson-like status, while the firm and its advisors are accountable to help accomplish the goals and objectives the client has set out for the Board.

Evidence-based Investment Philosophy:

Pitzl Financial uses an evidence-based, passively-managed philosophy, grounded in Modern Portfolio Theory (MPT), to invest and manage client wealth. This approach is based on academic research and backed by hard facts about the behavior of markets and individual client behavior as well as how individuals react to market behavior.



The company uses this evidence to build diversified portfolios, manage risk tolerance, and reduce investment costs to enhance overall portfolio returns.

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PrairieView Partners Review

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PrairieView Partners is a top-rated financial advisor in the Minneapolis-St. Paul metropolitan area, dedicated to delivering superior, highly-integrated wealth planning services to its clients.

The company was co-founded in 2007 by a group of professionals who are highly experienced and formally qualified in various aspects of financial planning and wealth management. As a Minneapolis financial planner offering diverse services to its clients, the team comprises of

Certified Public Accountants (CPA), Certified Financial Planners (CFP®), an Estate Planning Attorney, and a Chartered Financial Analyst (CFA).

PrairieView Partners has a broad-based service portfolio that includes:

- Retirement planning
- Portfolio management
- Estate planning
- Tax planning
- Trust & estate administration
- Stock option compensation
- Risk management
- Charitable planning

As a well-regarded wealth management firm in St. Paul, the company's service delivery revolves around its core values of Competence, Objectivity and Integrity. This core philosophy guides each of the firm's interactions with its clients.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

The following factors influenced our decision to include PrairieView Partners as one of 2016's top 10 financial advisory firms in the Minneapolis area.

Registered Investment Advisor (RIA):

PrairieView Partners is a registered investment advisory firm in the Minneapolis-St. Paul metropolitan area. As an RIA, the firm and its advisors are regulated by the U.S. Securities and Exchange Commission (SEC) and are required to provide a higher standard of service to their clients than would non-RIA firms.

Fiduciary Responsibility:

The company is legally and professionally bound to act as fiduciaries to its clients. All recommendations and advice provided therefore must be solely in the interest of the client, with no conflict of interest whatsoever.

Fee-only Advisors:

This St. Paul-based firm is paid solely by its clients and receives no fees or commissions for selling investment or insurance products. The fees charged are based on a percentage of the value of the portfolio being managed, with a minimum annual fee agreed upon based on the level of service required.

Integrated Strategy:

Unlike many other financial advisors in St. Paul and broader Minneapolis, PrairieView's business model is based on an integrated approach to financial planning. Using this strategy, expertise from a multi-disciplined team of lawyers, accountants, tax specialists, insurance experts and stock brokers is drawn upon to deliver both "big picture" and detailed advice to clients.

Broad-based Professional Services:

PrairieView provides its clients a broad array of professional services, from portfolio management and retirement planning, to smart tax planning strategies and charitable planning and more. This allows clients to receive comprehensive financial planning and wealth management solutions under one window.

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SilverOak Wealth Management LLC Review

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Edina-based [SilverOak Wealth Management](#) is an independent, fee-only boutique wealth manager in the Minneapolis/St. Paul area whose goal is to deliver life-enrichment to its clients through the successful attainment of their business, financial, and personal goals.

Working with a highly qualified, experienced, and multi-disciplinary team, the firm brings over 50 years of combined financial experience to bear at every client engagement. SilverOaks' clients come from a diverse set of society, and include:

- Individuals

- Business owners
- Professionals
- Corporate executives

As a dynamic wealth management firm in Minneapolis/St. Paul, the company's philosophy revolves around the "Circle of Life"—an idea that seeks to take the best of what was and align it with opportunities that exist today, while also positioning clients to leverage the endless possibilities of tomorrow.

As one of the top financial advisors in Minneapolis/St. Paul, the company has earned a number of awards, recognitions and accolades over the years, including:

- Being ranked #8 on CNBC's 2014 Digital Inaugural list of the Top 100 Fee-Only Wealth Management Firms
- Recognized as one of *Wealth Manager's* "Top Wealth Managers" in the July/August 2009, 2010 and 2011 issues
- Getting listed in *FA's* 2011 RIA Ranking
- Named in the *Minneapolis/St. Paul Business Journal* (February 18, 2011 issue) as a "Top Wealth Manager"

Individual advisors on the SilverOak team have proved their credentials as top wealth managers in Minneapolis by earning the coveted Five Star Professional award multiple times, from 2012 to 2015 consecutively.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

The following factors enabled SilverOak Wealth Management LLC to be included as one of 2016's top 10 financial advisory firms in Minneapolis.

Independent, Fee-only Advisor:

SilverOak is a fee-only wealth manager and financial planner in Minneapolis. The company operates independent of any other service providers and does not sell any third-party product or service to its clients. All of its revenue is derived from providing unbiased service and advice to clients.

Registered Investment Advisor (RIA):

As an RIA, SilverOak and its advisory team are legally and professionally bound to offer conflict-of-interest free advice to their clients. This means that all advice delivered must always put the clients' interest before anything else—even before the firm and its individual advisors.

This fiduciary responsibility also fosters greater trust in the advisor-client relationship.

Numerous Awards & Accolades:

As a top Minneapolis wealth manager, SilverOak has received numerous awards and recognitions from leading financial publications and industry watchers, including CNBC, *Wealth Manager*, *Five Star*, *Financial Advisor*(FA) and the *Minneapolis/St.Paul Business Journal*.

Value-added Services:

SilverOak is a full-service wealth manager in Minneapolis, providing a wide range of services to its clients. In addition, the firm also adds value to clients by cooperating and coordinating its own services with those of other professionals (bankers, lawyers, insurance agents) that clients may work with.

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Tealwood Asset Management Review

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Tealwood Asset Management, Inc. was established in 1987 and serves its clients as a financial advisor and wealth manager in Minneapolis through an ensemble of professionals with decades of diverse financial industry experience.

The Tealwood team brings together a multi-disciplinary group of individuals with the highest levels of personal integrity and professional skills.



As client-focused wealth managers in Minneapolis, the company's business model uses a Financial Life Planning approach, which places the client at the center of its advisory relationships. Around the client's needs, aspirations and risk tolerance, the Tealwood advisory team then builds personalized strategies and portfolios that help realize those objectives.

Tealwood is a dynamic Minneapolis wealth manager that manages wealth both on a discretionary as well as non-discretionary basis and offers its clients a range of portfolio options to choose from, including:

- Fixed income portfolios
- Equity portfolios
- Blended fixed income and equity portfolios

Fees charged for their services are based on the market value of the portfolios.

The company offers clients excellent learning and informational opportunities, through life-style and educational events, to enhance their knowledge about topics of interest, as well as to connect with the firm's advisors and like-minded clients.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Combinations of the following factors led us to consider Tealwood Asset Management as one of 2016's top 10 financial advisory firms in Minneapolis.

Owner-operated Advisor:

Tealwood Asset Management is owned and operated by a team of highly qualified and experienced professionals. This enables the company to build special personal relationships with their clients, unlike large financial advisory corporations.

Independent Advice:

As an SEC-registered investment advisory firm in Minneapolis, Tealwood is able to deliver unbiased and conflict of interest-free advice and recommendations to its clients. This is possible because the firm is not affiliated with any product/service provider, nor does it sell any investment products to its clients.

Solid Track Record:

Established in 1987 as a top-rated wealth manager in Minneapolis, the Tealwood team brings nearly 30 years of investment management and wealth advisory experience to the table.

Investment Discipline:

As Minneapolis wealth managers with a longer-term perspective, Tealwood Asset Management, Inc. has a value-oriented approach to building, growing, and protecting its clients' wealth. The hallmarks of this approach include risk management, research-based investing, exhaustive due diligence, portfolio diversification and continuous evaluation.

Individualized Communication Plans:

A top-rated wealth manager in Minneapolis, Tealwood believes in staying in touch frequently with its clients. In addition to regularly scheduled, customized portfolio reporting, the company also believes in individualized communications, including in-person meetings and calls, to stay in touch as often as required, based on client requests and preferences.

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Wade Financial Group Review

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Wade Financial Group is an independent, fee-only financial advisor in Minneapolis, which was founded by Jerry Wade, CFP®, CFS, in 1994. The company offers comprehensive financial planning, investment management, and tax and estate planning services to high net-worth individuals and families across the country.

The Wade Financial team features highly experienced and multi-disciplined professionals that include a CFP® Professional and a Certified Public Accountant.

As a front-line wealth manager and financial planner in Minneapolis, the firm carries some of the most revered industry designations, including Accredited Investment Fiduciary® (AIF®) and Chartered Financial Analyst® (CFA®), as well as being a member of the National Association of Personal Financial Advisors (NAPFA).

These qualifications and designations are a testament to the fact that the team has met some of the highest professional education and experience standards, which are enforced by leading industry regulators and watchdogs.

As broad-based wealth managers in Minneapolis, Wade Financial Group offers its clients a comprehensive set of wealth management services that includes:

- Income tax planning
- Retirement planning
- Executive benefits planning
- Investment planning
- Insurance planning
- College planning
- Business planning
- Estate planning
- Debt management

Through its ConVal® approach, the firm brings a long-term focus to investing that is strategically calibrated to achieve specific client investment goals and objectives.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

The following factors enabled Wade Financial Group to be ranked as one of 2016's top 10 financial advisory firms in Minneapolis.

Independent Advisors:

Wade Financial Group is an independent financial advisor in Minneapolis that offers its clients advice and counsel that is free from the bias usually associated with affiliates of brokers, major investment houses, and investment and insurance product vendors.

Fee-only, Fiduciary Financial Advisors:

The company is a fee-only Minneapolis wealth management firm, which means they do not accept fees, commissions, or other forms of compensation from third parties for advice and recommendations made to clients.

As fiduciaries to their clients, the company's advisors are legally, professionally, and ethically bound to deliver advice that's always in the clients' best interest. This fee-only status is strongly reflected in the firm's "You First" motto.

Long-standing Track Record:

The firm has been in business for over three decades, a testament to its success in the industry.

Media Savvy Company:

As progressive wealth managers in Minneapolis, Wade Financial is extremely tech-savvy and uses cutting-edge social networking tools, such as LinkedIn, Twitter, and Facebook, to communicate and stay in touch with its clients.

Custom-built Investment Portfolios:

While many of Wade Financial Group's peers in the industry invest client wealth in mutual funds and other indexed products, the firm does not believe in this "outsourced" approach to managing client money. All of the company's clients get the benefit of individualized, highly customized portfolios tailored specifically for their unique needs.

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White Oaks Wealth Advisors Review

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White Oaks Wealth Advisors, Inc., an independent financial advisor in Minneapolis with offices also in Florida, was founded by financial industry veteran Robert Klosterman, CFP®. Mr. Klosterman has been affiliated with the financial industry since 1975 and has been a Certified Financial Planner since 1989.

Like its predecessor firm R.J. Klosterman & Co, Inc., White Oaks has a clear vision to provide its clients with independent, expert financial planning and wealth management advisory services.

As a top wealth manager in Minneapolis and Florida, the firm provides a diverse set of personalized services to its clients, including:

- Wealth management
- Family office
- Financial planning
- Investment management
- Trust services
-

White Oaks has been recognized as one of the top-ranking wealth management firms in Minneapolis through individual and company-wide awards and accolades, including from some of the most respected sources in the financial industry. Some of these recognitions include:

- Being listed as one of the Top 250 Financial Advisors in the United States by *Worth Magazine*

- Recognition as one of the top 150 Financial Advisors by *Mutual Fund* magazine, *Medical Economics* and *Bloomberg's Wealth Managemer* magazine.
- Listed in CNBC's chart of the Top 100 fee-only wealth management firms

As a Minneapolis wealth manager whose views and opinions are well regarded in the industry, Mr. Klosterman is frequently quoted and published in mainstream financial media, including *CFP Today*, *The New York Times*, *USA Today*, *Minneapolis Star Tribune*, *Barron's* and *Fortune*.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

As a result of the following factors, White Oaks Wealth Advisors was ranked as one of 2016's top 10 financial advisory firms in Minneapolis.

Fee-only Advisory:

White Oaks have been operating as fee-only wealth managers in Minneapolis since 1996. As such, the company does not charge transaction fees, sell products to its clients, or receive commissions or other remuneration from third-parties. All fees and charges are transparent, and there is no conflict of interest in any of the advice or recommendations offered to clients.

Focused Clientele:

White Oaks Wealth Advisors is focused on providing financial planning and wealth management services to a select group of clientele—high net-worth and ultra-high net-worth individuals and families.

A la carte pricing options:

As a top-ranked Minneapolis wealth management firm, White Oaks offers its clients a wide range of pricing models to choose from. This allows clients to select the services they require, from an a la carte menu, knowing exactly what it will cost them up-front.

Track Record of Satisfied Clients:

Most of the firm's new clients join the White Oaks family as a result of referrals from existing clients and other industry professionals. This validates the company's standing as top-ranked wealth managers in Minneapolis.

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Conclusion – Top 10 Financial Advisory Firms in Minneapolis

The above list of investment advisors, wealth managers, and financial planners in Minneapolis, St. Paul, Edina, and other cities within Minnesota is by no means exhaustive. However, the resources offered here could provide a great start in your search for the perfect financial advisor in Minneapolis that can meet, and even exceed, your financial planning needs.

If you have questions, comments, or tips about this "Top 10 Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota)" article, send us an **email**. Follow us on social media to be the first to hear about major economic news stories.

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Cheers,
AdvisoryHQ Team