

Top 10 Financial Advisors in Dallas, Texas (2016 Ranking of Dallas Wealth Advisors)

2016 RANKING OF TOP WEALTH ADVISORS IN TEXAS

Finding a Top Rated Financial Advisor in Dallas, Texas

There is a wide range of registered investment advisors (RIAs), wealth managers, and financial planners in Dallas, Texas.

If you are looking to find the best financial advisory firm in Dallas, Texas, you may wonder "where do I even begin"? And "what criteria should a wealth advisor in Dallas meet in order to be considered a top ranking Dallas financial planner or a best rated wealth manager in Dallas"?

These questions are just the tip of the iceberg. There is a wide range of factors to consider when searching for a top rated wealth management firm or financial advisor in Dallas, Texas.

Answering Your Questions

To answer the many questions that Dallas residents may have regarding the best financial advisors in Dallas, the AdvisoryHQ research team has conducted a detailed analysis of wealth managers, financial and investment advisors in Dallas, and we have published our findings in the sections below, starting with the list of top 10 advisors, financial planners, and registered investment advisors in Dallas.



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. We are committed to simplifying the research that consumers conduct before choosing a financial advisor, RIA, financial planner, or wealth advisor across the U.S. and the U.K.

Our reports are published for free, and we do not accept any compensation for the financial advisor reviews that we conduct and publish. This is to ensure the highest levels of objectivity and unbiased editorial reviews.

AdvisoryHQ's List of the Best Financial Advisors in Dallas

- **Brennan Financial Services**
- **Chessman Wealth Strategies**
- **DeRamus Wealth Management**
- **Elite Financial Management**
- **Heritage Financial Planning**
- **HFS Wealth Management**
- **Lee Financial**

- [Tolleson Wealth Management Investment](#)
- [Turtle Creek Management](#)
- [Weaver Wealth Management](#)

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

Top 10 Financial Advisors in Dallas, Texas (2016 Ranking of Dallas Wealth Advisors)

Firm	Location
Brennan Financial Services	Dallas
Chessman Wealth Strategies	Dallas
DeRamus Wealth Management	Dallas
Elite Financial Management	Dallas
Heritage Financial Planning	Dallas
HFS Wealth Management	Dallas
Lee Financial	Dallas
Tolleson Wealth Management Investment	Dallas
Turtle Creek Management	Dallas
Weaver Wealth Management	Dallas

Methodology for Selecting Financial Advisors (Dallas, Texas)

How did we select this list of best Dallas financial advisors and the top fee-only/independent wealth managers in Texas?

Using publicly available sources, we identified a wide range of financial advisors, asset and wealth managers, and financial planners that provide services in Dallas 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 Dallas, Texas.



[Click here for an overview of AdvisoryHQ's Top-Down Methodology for Selecting Top Advisors.](#)

Detailed Review – Top Dallas Wealth Managers and Financial Planners

What follows is a detailed review of each of the top financial advisors in Dallas, Texas, that made our list. In this detailed section, we highlight the features of each Dallas-based wealth management firm that made them one of our top picks.

Brennan Financial Services Review

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Brennan Financial Services is a financial planning firm founded in 1983 on the premise that everyone in America can be financially successful and independent—they just need the tools and education to get them there. Brennan Financial offers financial planning and investment strategies such as retirement income, wealth accumulation, and tax reduction.

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

An Independent Financial Advisor:

Brennan Financial is an independent financial advisor that stands behind the client, not another entity that dictates how they conduct their business. Because of this, you can trust that their team puts you first.

A Family Focused Firm:

Something we noticed rather quickly is that the small team of four advisors at Brennan Financial have something in common—their name. As it turns out, they are comprised of a father and his three children.

This strong family commitment can only help to serve you well as they translate their experiences into your own family's financial future.

Investment Strategies:

Brennan Financial claims their singular goal is to help families build wealth by offering custom-tailored solutions to their needs. Their investment strategies include:

- Wealth accumulation
- Retirement strategies

- 529 education plans
- Tax reduction
- Direct rollovers
- Life insurance
- Stretch IRAs
- Self-employed retirement plans
- Family legacies

Retirement Planning:

With over 30 years of retirement planning experience, it's safe to say that Brennan Financial knows a thing or two about helping you plan for your retirement. They believe it's never too early to start planning for those 20-30 years after working.

Community Involvement:

Giving back to the community is important to Brennan Financial. They partner with many charities and organizations to give back to the community. This includes the American Cancer Society, the North Texas Food Bank, and Hockaday School. You can see a complete list of charities Brennan Financial partners with [right here](#).

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Chessman Wealth Strategies Review

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Chessman Wealth Strategies was founded in 2004 as an independent financial advisor in Dallas, Texas, but they offer services to clients throughout the United States. Chessman Wealth offers financial planning and wealth management services geared to a unique set of clients. Differing in approach from most of their peers, they live by a Christian philosophy, as we will discuss below.

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

Filling a Specific Need:

In order to provide the best and most comprehensive services, Chessman Wealth caters to a specific group of clients. These include professionals, attorneys, and people in transition (change of employment, business succession, women in transition, retirees and people close to retirement).

Wealth Management Services:

Comprehensive wealth management starts with a thorough understanding of your financial goals. Your financial advisor will begin by getting to know you and your lifestyle in order to create a completely customized portfolio. Then, the two of you can build upon your assets with the following services:

- Financial planning
- Risk management
- Wealth management
- Tax planning
- Business planning
- Estate planning
- Retirement planning

Faith-Driven Advisors:

If your daily life is anchored by your faith and following biblical principles, Chessman Wealth may be perfect for you. As Christian Financial Advisors affiliated with Kingdom Advisors, an organization of Christian financial advisors, they believe in the eternal significance of the decisions you make concerning the stewardship of the resources God has bestowed upon you.

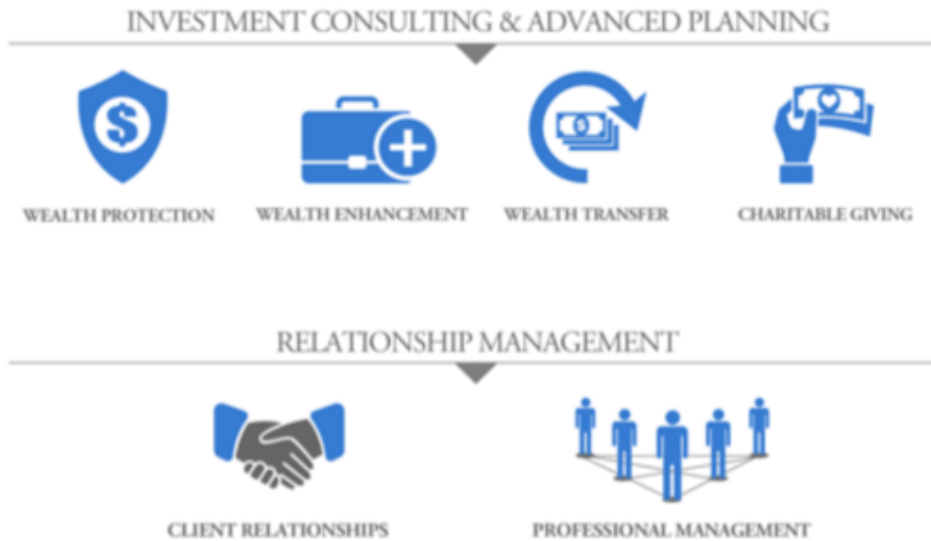
No Obligation Consultation:

If you would like to test the waters before making the plunge, you can contact Chessman Wealth for a free, no obligation consultation. They'll show you what they can do for you without the worry that you'll have to sign up for anything or pay any associated costs. This is a benefit to anyone looking for the right Dallas-based financial advisor.

Trademarked Solutions:

In the process of helping you manage your finances, Chessman Wealth has developed a trademarked 6-step system of Discovery,

Smart.Choices.Strategy, Mutual Commitment, 45 Day Review, Advanced Planning, and Progress Managing. This comprehensive system allows complete coverage of all of your needs. Their Advanced Planning module is specifically made for unique financial needs such as the following:



You can take a comprehensive look at what each stage of Chessman Wealth's 6-step system entails on their [Smart-Choices](#) page.

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DeRamus Wealth Management Review

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DeRamus Wealth Management is an independent wealth management and investment firm in Dallas, Texas. Their goal is to provide their clients with customized wealth management and investment services that address each unique situation. They steer clear of one-size-fits-all strategies and instead take the time to really listen to what their clients want.

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

Independent Investment Policy:

As an independent financial advisor, DeRamus Wealth has devised and implemented a policy which reflects their commitment to providing an unbiased, client-centered approach that is not clouded by the need for sales or commission-based recommendations.

Comprehensive Wealth Management:

Serving professionals, corporations, and business executives, here is an overview of services offered through DeRamus Management:

For professionals:

- Financial planning
- Investment tax planning
- Special situations planning
- Retirement planning
-

For corporate executives and highly-compensated employees:

- Investment risk management
- 10b5-1 plans
- High net-worth individual planning
- IRC 1031 like-kind exchange

For corporations:

- Business retirement services
- Cash management
- Deferred compensation for key talent
- ERISA 404(c)/retirement plan consulting
- Group health and welfare plans

To read a detailed description of each of these services, visit DeRamus Wealth's [Wealth Management page](#).

Outside Affiliations:

In addition to in-house services, DeRamus Wealth partners with [VSR Financial](#) and [First Clearing, LLC](#) as their brokerage firms of choice.

This affiliation serves to expand the reach of services available to you. While this may appeal to some consumers, First Clearing is a non-bank

affiliate of Wells Fargo & Company, so keep this in mind when making your considerations.

Digital Meetings:

As a working professional, you may find that you need to meet with your financial advisor, but your schedule may not allow for an immediate conference. Worry no more! DeRamus Wealth offers digital meetings between you and your financial advisor that are only a few short clicks away. This can be really convenient in today's world.

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Elite Financial Management Review

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President and financial consultant William (Bill) Dendy founded [Elite Financial Management](#) in 2004 after more than 22 years of helping people ease into a comfortable retirement. Thus the premise of Elite Financial continues to be on retirement planning, but as we will discuss, they offer other financial services as well.

As an independent financial advisor, they operate five Texas locations including Dallas, Plano, Midland, Houston, and San Angelo.

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

Variety of Services:

Elite Financial has carved out six categories, each associated with a list of specific services they've gathered to provide you with the most comprehensive financial planning services they can. We've outlined a selection of each for you:



Retirement Planning:

- 401k
- Profit sharing plan
- Annuities
- Roth IRA

Investment Planning:

- Asset allocation
- Global perspective
- Alternative investments
- Rebalancing strategies

Education Planning:

- 529 prepaid tuition plan
- Savings bond
- Custodial account (UTMA/UGMA)
- Zero coupon muni bond

Insurance Planning:

- Term life
- Disability
- Fixed annuity
- Variable annuity

Estate Planning:

- Gifting and wealth transfer strategies
- Beneficiary designation
- Special needs trust
- Charitable trust

Products:

- Mutual fund
- ETF
- Stock
- Fee-based advisory program

As you can see, there is a broad-range of services offered, and you can view the FULL list of financial services [here](#).

In the News:

With their proven wealth planning methods at the helm, Elite Financial has been a continuous presence in the media on television, on the radio, and in print. They've been featured on several Fox News programs as well as The Wall Street Journal, and they continue to make radio, television, and print news appearances. View clips, listen to newscasts, and see more about Elite Financial's media presence [here](#).

Financial Education:

All five of Elite Financial's locations offer workshops and seminars that educate and answer all kinds of financial questions. Led by experienced professionals, you can see their [events page](#) for dates and times for all of their seminars.

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Heritage Financial Planning Review

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Heritage Financial Planning is an experienced Texas financial advisor specializing in retirement planning, investment management, asset allocation, and stock options planning. However, they maintain a broad knowledge and extend services to all aspects of financial planning.

They are spread out among three financial planning firms in Texas including Dallas, Grapevine, and Southlake/Keller.

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

Financial Options:

Through years of listening to what their clients need, Heritage Financial has expanded their services and can assist you in managing any of the following scenarios:

- Retirement Planning Strategies
- Personal Financial Planning
- Personal Tax Planning
- Ongoing Asset Management
- Life, Health, Long-Term Care and Disability Insurance Needs Analysis
- College Funding Advice
- Stock Option Advice
- Lump Sum Distribution Advice
- Employee Financial Education—Seminars on 401(k)s, Employee Benefits, etc.
- Property and Casualty (Home/Auto/Liability) Insurance Needs Analysis
- Second Opinion on Investments or Current Financial Plan
- Financial Seminars for Military, Church, and Civic Groups

Objectivity and Independence:

As a fee-only and independent financial advisor, Heritage Financial is not driven by sales or commission-based advice. They have the freedom

to earn their clients' trust by working to empower them to make the best financial decisions possible.

Affordability:

Most fee-only financial advisors charge an annual or bi-annual fee for their services. Heritage Financial offers various fee-based, per project, and hourly rates that are flexible and allow you to pay only for the services you want. This is fantastic for smaller asset management.

Wealth of Information:

Visit Heritage Financial's [Lifestyle page](#) for a refreshing and unique look at how to apply sound financial principles to areas of your everyday life. They believe creating a life map means taking a close look at your personal finances, and these informative videos help you do just that.

Experience Speaks Volumes:

Founder and Principal Steve Blankenship brings with him over a decade of financial expertise through formal education, real world experience, and his relationships with other award-winning financial advisors. He is a Certified Financial Planner and Registered Financial Advisor, both of which have very demanding standards. His team of advisors are members of numerous professional organizations, and you can see their specific accreditations [here](#).

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HFS Wealth Management Review

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At [HFS Wealth Management](#), they proudly tout that they are "more than investment advisors, but trusted advisors," and this rings true by way of long-time clients and continued professional growth.

They've been offering comprehensive planning, consulting, and investment services to individuals, families, and corporations since 1994.

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

A Comprehensive Team:

The team of 18 at HFS Wealth is comprised of a variety of talents. From executive management to the administrative level, you'll find highly trained and accredited individuals to serve your financial needs. Each member is selected to further reflect the firm's commitment to customer excellence. From CFPs to CPAs, to CAIA (Certified Alternative Investment Analyst) accreditation, take an inside look at the whole team right [here](#).

A 3-Tiered Approach:

With financial planning, consulting, and investment management at the forefront of their services, HFS will give you the tools you need to create, execute, and manage your financial goals.



PLANNING

A goal without a plan is just a wish



CONSULTING

Financial advice doesn't always fit in a box



INVESTMENTS

A unique approach tailored to meet your needs

This is an overview of what each tier of service can offer you:

Planning:

- Establish a financial position
- Retirement and goal planning
- Estate planning
- Investments
- Risk management
- Managing tax income

Consulting:

- Business planning
- Marital financial planning
- Complete estate planning strategies
- Foundation and endowment planning

Investments:

- Protecting wealth/risk management
- Thinking outside the box/creative investing
- Marriage of investing with planning/holistic approach
- Three phase investment process:

Three Phase Investment Process



Total Digital Access:

Your financial world is at your fingertips at HFS Wealth. Through their online access points, you have around-the-clock access to a world of financial information, specifically tailored to you. Take a look at what HFS Wealth has for you:

- HFS Wealth Management Board: Your main "control center," your "living" financial plan. Browse with complete security and manage your entire financial world from one place.
- HFS Investment Portal: To take a consolidated look at your investment portfolio, you'll be able to manage and monitor your investments with ease. Holdings, draws, expenses, income, gains, and losses are updated daily.
- Custodian Account Access: HFS Wealth holds custodian accounts with Charles Schwab, TD Ameritrade, and Jefferson National, meaning that by becoming a client of HFS Wealth, you become a client of theirs, too. You can login for a variety of additional services.

A Top 100 Firm:

HFS Wealth Management has been named a top financial advisor on CNBC's Top 100 Fee-Only Wealth Managers. This honor is bestowed only upon firms that meet the highest ethical and business standards.

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Lee Financial Review

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Having over 40 years of history serving their clients, Lee Financial has been offering financial planning and investment management services for a long, long time!

They've seen the markets fluctuate and have plenty of experience to know what works and what doesn't. Lee Financial is one of the nation's first fee-only financial advisory firms, and they have a lot to offer their clients.

As an independent financial advising firm, their services are best suited for physicians, entrepreneurs, executives, and widows or widowers, to name a few, who have at least \$1.5 million in investable liquid assets.

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

Core Values:

When founder Richie Lee launched his financial advising career in 1972, he quickly learned that the commission-driven investment models of his time just weren't what he envisioned for his business. From the beginning, he wanted his clients to be able to look beyond the limitations of traditional portfolio management and feel secure that they were truly receiving custom-tailored services that would benefit them first and foremost. Today, the Lee Financial team continues this way of doing business!

Fiduciary Duty:

As a Registered Investment Advisor (RIA), Lee Financial is dedicated and required by law to act in the best interest of the client. This means they do not sell nor receive commission on selling you products (such as mutual funds or insurance).

WholeVision Approach:

At the center of operations at Lee Financial lies their trademarked WholeVision approach. This approach is founded on the premise that "the whole is greater than the sum of its parts." The integrated process involves four primary forms of capital, as outlined below:



Human Capital:

This is a unique characteristic focused on by Lee Wealth, and it stands for the non-tradable asset of each person as an individual. Through life experiences, job skills, and personal tastes and talents, each person holds their own human capital, and this area is integrated into the WholeVision model.

Financial Capital:

Based on your human capital, this is a representation of financial assets which are invested to help you achieve long-term goals such as financial security, working capital for entrepreneurs, and support obligations.

Fulfillment Capital:

This area is the chosen lifestyle and personal rewards that people make room for. These costs usually evolve over time and are largely based on the success of human and financial capital.

Shared Capital:

Shared capital is the allocation of assets that need to be set aside for purposes such as family trust funds, philanthropic purposes, or for income or estate taxes.

Access to Alternative Investments:

To increase portfolio diversification and minimize risk, Lee Financial utilizes alternative investment approaches such as real estate, hedge quality strategies, arbitrage, private equity, and energy and natural resources.

Service Offerings:

No matter what your ultimate investing goal is, you may stand to benefit from looking into Lee Financial's financial planning and investment management services. Take a brief look at some items they cover:

Financial Planning:

- Goal definition
- Education planning
- Tax planning
- Retirement planning

- Insurance planning
- Estate planning
- Business planning
- Inter-generational wealth transfer
- Charitable foundation management
- Philanthropic counsel

Investment Management:

- Alternative assets
- Cash and other investments
- Private equity
- Equities
- Real assets
- Real estate
- Tax-exempt bonds
- Taxable bonds
-

For a comprehensive view of their specialties, take a look [here](#).

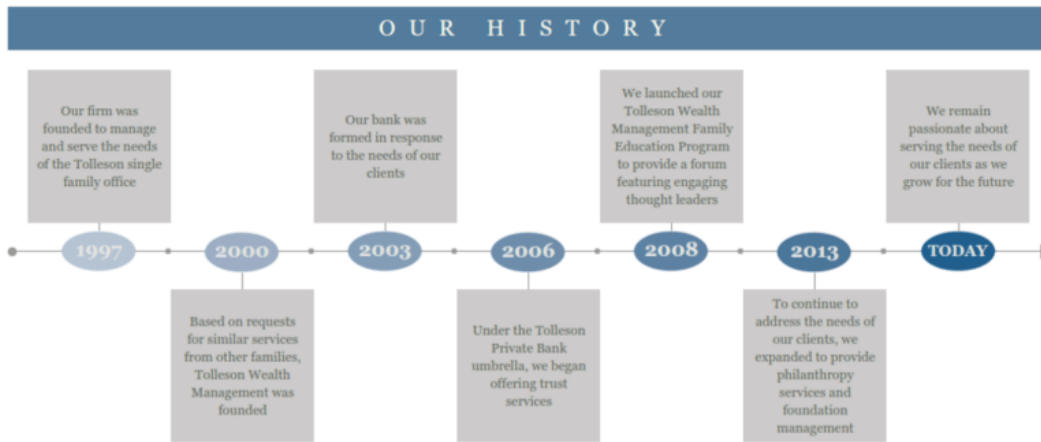
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Tolleson Wealth Management Investment Review

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Tolleson Wealth Management is a Dallas–based, independent, fee-only wealth management, trust service, and private banking firm that spans four generations of family with one goal in mind: to foster an understanding of financial services which very few can match.

Founded in 1997 by John Tolleson, they operate on a foundation of integrity, service, excellence, and teamwork.



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

Strategic Wealth Management Services:

According to Tolleson Wealth, they do not pursue any one singular investment strategy. Instead, they focus on the desires of their clients and craft portfolios tailored to those needs. Due in part to the vast capital overseen by Tolleson Wealth, clients have extended access to services usually unavailable to individual accounts.

They include, but are not limited to, the following:



If you are interested in learning more about what each sector of wealth management entails, you can take a detailed look [here](#).

Private Banking:

Banking is central to a fully integrated financial management plan. For this reason, Tolleson Private Bank was created to serve all of its clients with in-house private banking options. Tolleson Private Bank offers the same services as large corporate institutions, but they do so while still maintaining exceptional personal relationships with their clients. Let's explore both their traditional banking services and their more customized credit solutions:

Traditional Services:

- Checking Accounts
- Money Market Accounts
- Mobile Banking
- Online Banking
- Visa Debit Cards
- Credit Cards
- Certificates of Deposit
- ATM Cards

Customized Credit Solutions:

- Mortgage Loans
- Land Loans
- Investment Loans
- Personal and Business Loans
- Lines of Credit
- Letters of Credit
- Overdraft Protection Lines
- Aircraft and Yacht Financing

For comprehensive private banking information with Tolleson Private Bank, visit their [banking page](#).

Trust Services:

The beginnings of Tolleson Wealth Management's trust services began very simply—by creating a trust for one family: the Tollesons. From there, they extended their understanding of the unique needs of affluent families to all of their clients who need it.

Tolleson Wealth sees themselves as trusted, unbiased advisors to aid you and your family in constructing and managing a successful family trust.

Philanthropy:

Tolleson Wealth Management supports the charitable activities of families and charitable organizations in the following ways:

For Families:

- Evaluation
- Assistance
- Structure
- Facilitation
- Recommendation

For Charitable Organizations:

- Managing
- Operation support
- Customizing
- Coordinating
- Evaluating
- Facilitating

If charitable contributions are of interest to you on an individual or organizational level, you can read more about specific details of Tolleson Wealth's approach to charitable planning [here](#).

Family Education:

Families of wealth face a unique set of circumstances in their financial planning and wealth management needs. Tolleson Wealth Management has created [The Tolleson Family Education Program](#) to help educate and guide families in how to be effective stewards of wealth, how to create a plan, and how to make prudent decisions for the long term.

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Turtle Creek Management Review

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Turtle Creek Management, LLC is a Registered Investment Advisor (RIA) in Dallas, Texas. Founded in 2006, Turtle Creek Management strives to provide comprehensive investment management services and trust and estate planning services to a wide variety of clients with at least \$2 million in investable assets.

Since their inception, they've branched out and created Turtle Creek Trust Company, LTA, which serves complimentarily alongside their financial management business (highlighted below).

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

Strong Investment Philosophy:

Turtle Creek Management's goal is to "construct investment portfolios tailored to each client's specific investment objectives and risk tolerance." What this means for you is a team of professionals who will get to know you and your specific objectives and tolerances, and then create a custom portfolio to encompass all your needs.

Independently Owned:

Turtle Creek Management is an independently owned financial advisor in Dallas, Texas, and has no outside relationships with broker-dealers. You can rest assured there is no conflict of interest between you and the services you receive. As a Registered Investment Advisor (RIA), Turtle Creek Management is further obligated to keep you their top priority.

Client Communication:

Outside of scheduled face-to-face meetings, Turtle Creek Management feels it's important to keep their clients informed about what's happening with their money. They keep the lines of communication flowing through the use of:

- Letters detailing any actions taken on your behalf
- Monthly and yearly statements
- Web-based account access
- Periodic updates on key events within the firm

Estate and Trust Services:

In 2009, after seeing the need for comprehensive and dependable trust services, Turtle Creek Management created the Turtle Creek Trust Company, LTA, to provide trust services to select high net-worth families. This trust service works alongside your financial management services and is backed by The Texas Department of Banking. Expected benefits include:

- Trust and estate administration
- Quarterly estimated tax payments
- 1099s, IRS tax reporting
- Monthly account/reporting
- Fiduciary income tax return (coordinated with outside CPAs)

Investment Management Strategies:

With a completely customizable approach to investing, Turtle Creek Management provides services on a discretionary basis using separately managed accounts. Each client works with an individual portfolio manager who is solely focused on the development of chosen strategies. What unique investment strategies does Turtle Creek Management offer? Take a look:

Equity Investment Process:

Turtle Creek Management utilizes a value-style stock selection. Each company is reviewed and given a ranking based on Turtle Creek's own methodology. They seek to buy competitively advantaged companies with secular growth prospects, strong financial profiles, and attractive returns on invested capital.

Fixed Income Investment Process:

Through the assembly of diversified portfolios of high-quality corporate, treasury, agency, and municipal bonds, Turtle Creek has developed a concise system of portfolio risk reduction and income generation. They do this through a fundamental credit analysis process and the intermediate duration of each portfolio, to dampen the impact of potential interest rates on a portfolio's values.

For more detailed information on Turtle Creek Management's investment strategies, go [here](#).

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Weaver Wealth Management Review

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Headquartered in Fort Worth, Texas, since 1950, [Weaver Wealth Management](#) offers comprehensive assurance, tax, and advisory services as they aspire to help you capitalize on your assets, increase efficiency, plan for expansion, and effectively manage risks. Their services are best suited for corporations and company executives.

Additionally, Weaver Wealth Management has 6 Texas locations including Dallas, Austin, San Antonio, Houston, Midland and Fort Worth. They also have 2 more firms in Los Angeles, California, and Stamford, Connecticut.

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

Distinct Corporate Knowledge:

Weaver Wealth Management holds a distinct library of personal knowledge in the day-to-day and long-term operations of corporations. Their services are customizable for each sector, allowing for growth and flexibility at all levels. This list is an example of the industries Weaver Wealth serves best:

- Construction
- Government
- Financial services
- Higher education
- Healthcare
- Nonprofit
- Insurance
- Manufacturing, distribution, and retail
- Oil and gas
- Oilfield services
- Technology
- Renewable energy

Inspire – A Women's Initiative:

Considering the fact that women make up over 40% of Weaver Wealth's client-focused professionals, Inspire was launched in 2005 as a career development initiative designed to enhance the careers of their female professionals. We applaud such industry standards and encourage you to take a deeper look into their crusade [here](#).

Unique Assurance Services:

Weaver Wealth believes that quality of information and the power of insight should always be available to you for all of your professional and personal decisions. They've created a variety of assurance services aimed to give you the best direction possible. Among these services you'll find:

- Agreed-upon procedures
- Audit, review, and compilation
- Employee benefit audit plan
- IFRS assessment and conversion
- Peer review
- Public company services
- SSAE 16/SOC 1, 2, and 3

Tried and True Tax Services:

Tax matters and liabilities can add up fast. Weaver Wealth Management has decades of tax experience and inside knowledge that will help guide you through any tax situation. Here is some of what they cover:

- Federal tax compliance planning
- International tax
- Public company services
- State and local tax
- Wealth strategies

Customized Advisory Services:

If you are looking for a traditional financial advisor, you probably won't find one here. Weaver Wealth focuses on a select group of advising strategies. Their advisory services include:

- Energy compliance and consulting
- Financial institutions consulting
- Forensics and litigation services

- IT advisory services
- Public company services
- Risk advisory services
- Transaction advisory services

If you find yourself wondering what each service offering in all three categories entails, there is a detailed overview of each available on Weaver Wealth's [services page](#).

Giving Back:

Weaver Wealth Management strongly believes in their responsibility to give back to the community in which they live. This due diligence spurred them to create the Weaver Private Foundation, along with collaborating with other charitable foundations to maximize their giving opportunities.

Employees of Weaver Wealth are also encouraged to participate in charitable activities and are asked to submit names of nonprofit organizations they would like to be the "charity of choice," which begins each year in June. For the 2014-2015 fiscal year, Weaver Wealth employees chose [Feed the Children](#) and the foundation contributed over \$50,000 and more than 575 volunteer hours to the cause.

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Conclusion – Top Dallas, TX, RIAs and Financial Advisors and Planners

After carefully reviewing this list of the “Top 10 Financial Advisors, RIAs, and Wealth Managers in Dallas, Texas,” you no doubt have a better grasp of which services you may want and need.

However, you also probably have additional questions. How do you know which services YOU need specifically? What services would be overkill and don't apply to your needs? These are questions to ask yourself as you whittle down this list of top Dallas investment managers and financial advisors and planners.

You can request a free consultation or second opinion from any of the financial advisors in Dallas that offers such a service. This should open

your eyes to areas of your financial portfolio you may not have even considered.

Outside of a consultation, consider making a list of your investable assets and also one with what you hope to gain out of a relationship with a Dallas-based financial advisor. Carefully look over your lists and use that information to match your needs up with one of our top financial advisors in Dallas.

When you have a good idea which direction you want to go, don't be afraid to request an official appointment to confirm that they are the right choice for you. While there is no one-size-fits-all financial advisor in Dallas, Texas, we have no doubt that there is a provider on our list that will match or even exceed your expectations.

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Cheers,
AdvisoryHQ Team