

# Investment Advisor Search – Top 10 Investment Companies

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## 2016 RANKING & REVIEWS TOP INVESTMENT COMPANIES

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### How Should You Select the Best Investment Firms?

Selecting the best investment companies and the top-rated investment firms is an important undertaking, whether you're looking for the best investment companies for beginners, or you're an expert investor looking for the best investment firms with a philosophy similar to your own.

Some of the primary considerations most people keep in mind when choosing the best investment companies for their needs include:

- The best investment companies offer investment strategies driven by the goal of having a sense of security and wealth-building potential.
- Top investment firms offer many different ways to build retirement savings.
- The best investment companies have an approach that's guided primarily by the needs of the client.
- The largest investment companies and top-rated investment firms will typically have a broad array of investment products clients can choose from.

Thanks to online platforms and the growth of investment opportunities offered by banks, people have an increasing number of choices when it comes to investing their money, but traditional brokerages, which represent many of the largest investment companies, are still favored by many people.



*Award Emblem: Top 10 Best Investment Companies*

As the largest investment companies, these traditional brokerages tend to be inexpensive and also pair the option for personalized in-person advice with online trading capabilities.

The following review and ranking of the best investment firms, and the biggest investment companies cover these traditional brokerages.

The ranking highlights key reasons they were included on this list of investment companies and factors that led to their selection as top-rated investment firms.

This review and ranking of the best investment companies and the biggest investment firms is designed to serve as a guide for anyone seeking a brokerage, whether they want to switch from their current investment firm, or they're looking for the best investment companies for beginners.

As well as this ranking including companies that offer a combination of traditional, in-person investment advice, it also features the best investment firms featuring automated, robo investing.

***See Also: [Best Building Societies in the UK | Ranking and Reviews](#)***

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## AdvisoryHQ's List of the Top 10 Investment Companies

- **Betterment**
- **BlackRock**
- **BNY Mellon Investment Management**
- **Fidelity Investments**
- **J.P. Morgan Asset Management**
- **Northern Trust Asset Management**
- **PIMCO**
- **State Street Global Advisors**
- **T. Rowe Price**
- **Vanguard**

*This list is sorted alphabetically (click any of the above names to go directly to the detailed review for the best investment firms)*

### **Related:**

- *[Can Anyone Request a Review of Investment Companies?](#)*
- *[Do the Best Investment Companies Have a Say in Their Review & Ranking?](#)*
- *[Can Top Investment Companies Request Corrections & Additions to Their Reviews?](#)*

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## Best, Largest and Top Investment Companies

<b>Investment Companies</b>	<b>Websites</b>
Betterment	<a href="https://www.betterment.com/">https://www.betterment.com/</a>
BlackRock	<a href="https://www.blackrock.com/">https://www.blackrock.com/</a>
BNY Mellon Investment Management	<a href="https://www.bnymellon.com">https://www.bnymellon.com</a>
Fidelity Investments	<a href="https://www.fidelity.com/">https://www.fidelity.com/</a>

J.P. Morgan Asset Management	<a href="https://www.jpmorgan.com">https://www.jpmorgan.com</a>
Northern Trust Asset Management	<a href="https://www.northerntrust.com">https://www.northerntrust.com</a>
PIMCO	<a href="https://www.pimco.com">https://www.pimco.com</a>
State Street Global Advisors	<a href="https://www.ssga.com">https://www.ssga.com</a>
T. Rowe Price	<a href="https://www3.troweprice.com">https://www3.troweprice.com</a>
Vanguard	<a href="https://investor.vanguard.com">https://investor.vanguard.com</a>

*Table: Top 10 Best Investment Companies | above list is sorted alphabetically*

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## **Methodology for Selecting the Top Investment Companies**

The process to select top-rated firms, including the names on this list of investment companies, is one that's based entirely on the investor.

This means that after doing intensive research to uncover all of the top investment firms, we compared them to a list of carefully defined, consumer-driven criteria.

Only then, once they were measured against this rigorous, standardized criteria, did we finalize this list of investment companies to include only the top 10 investment companies.

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## **Detailed Review—Top 10 Investment Companies**

After carefully considering each of the best investment firms, we created the following list of the top 10 investment companies.

As you continue reading, you'll find detailed reviews for each of our picks, as well as specifics of some of the factors we used in our decision-making process.

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# Betterment Review

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A leader among the world's biggest investment companies and best investment companies, [Betterment](#) is actually unique from many of the other names on this list.

Betterment is not only one of the top investment companies, but their work is based on a technology-driven platform. It was founded by Jon Stein to represent an intersection between investing and technology.

Betterment was [founded in 2010](#) and has continued to grow over the years and offer an increasing number of people smarter ways to invest and achieve their goals. In addition to a platform for direct investors, there's also Betterment for Business and Betterment for Advisors.

## **Key Factors That Enabled This to Rank as One of the Top 10 Investment Companies**

Among the top investment firms, the following is a brief list of reasons Betterment was included on this list of investment companies.

### Synced Accounts

As not only one of the top-rated investment firms but also a leader in terms of investment technology, Betterment offers customers the opportunity to sync their outside investment accounts.

This allows Betterment to get a complete view of the customer's financial picture and offer them the best possible advice.

Also, thanks to the ability to sync accounts, Betterment customers can see their total net worth in one centralized location, and this leader among the biggest investment firms and the best investment firms can then show customers where they're losing money because of fees and unused cash.

### Automation

Much of the concept that drives Betterment and has led it to become one of the world's top investment firms is their idea of convenience, driven by technology and automation.

When people have the benefit of automation, it makes it easier for them to invest and know they're also making the right decisions.

Betterment features the ability to schedule deposits, and these automated deposits allow customers to remain on track with their goals by setting up recurring deposits. SmartDeposit is a feature that lets customers put more of their money to work through the automatic investment of excess, idle cash.

Also, every time a customer deposits money or receives dividends, their portfolio is automatically rebalanced.

These automation tools not only help clients have optimized accounts, but they also make investing nearly effortless.

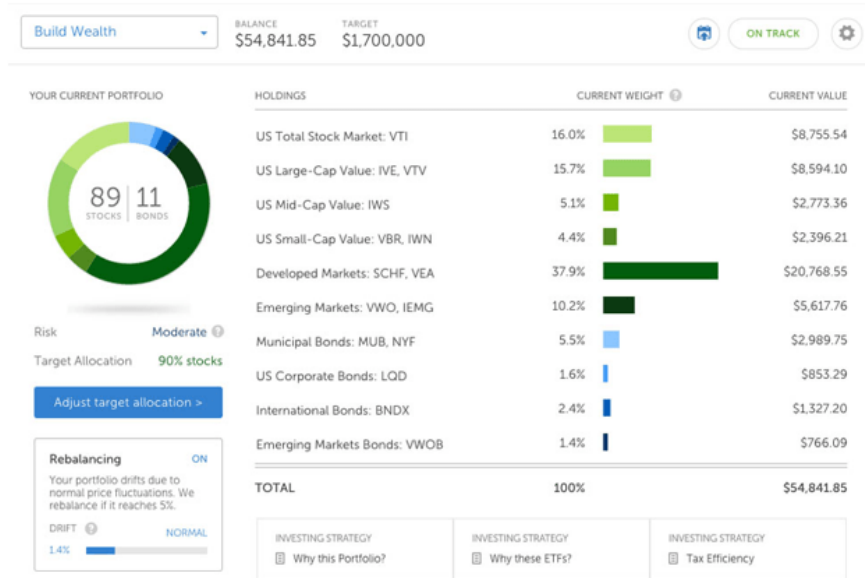
### Intelligent Portfolios

A key reason Betterment was included in this ranking of the top investment firms and the biggest investment firms is because of their intelligent portfolio design, which leads to optimal performance.

The portfolio design at Betterment is based on Nobel Prize-winning research, all with the goal of helping customers get the best possible returns.

The portfolio is diversified and includes low-cost, liquid, index-tracking ETFs. This is paired with algorithms that are tax-efficient and the automated optimal behaviors. This all leads to the best way to grow your wealth if you're a customer of Betterment.

An investor's money is invested in up to **12 different asset classes**, and each ETF is selected to balance low costs and high liquidity.



Source: *Betterment Portfolio*

## Security

When a consumer opts to work with top investment firms that are based online, security and privacy are important, and both are a priority with Betterment.

As one of the top investment companies, Betterment uses the strongest available browser encryption. All data is stored on servers located in secure facilities, and this leader among the top-rated investment firms has a rigorous system of processes to secure and store data.

Customer information is never shared with a third party without their permission as well.

Betterment offers fraud assistance if there is ever any unauthorized activity, and Betterment is a member of SIPC, which protects securities of member customers up to \$500,000.

***Don't Miss: Top UK Banks | Ranking | Biggest British Banks & Best Banks in the UK***

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# BlackRock Review

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Along with being one of the world's top-rated investment firms, [BlackRock](#) is also one of the largest investment companies. BlackRock was founded in 1988 and since then has remained committed to putting clients first, being innovative in their thinking, and maintaining a high performance level.

As of June 2016, BlackRock [manages more money](#) than any other investment firm, and they work with clients that range from large-scale institutions to individuals who want to grow their retirement.

## **Key Factors That Led Us to Rank This as One of the Top 10 Investment Companies**

BlackRock was included on this list of investment companies and top investment firms for the following reasons.

### Alternative Investments

BlackRock understands the interconnectedness of the global economy, and with that in mind, they offer investment options based on the fact that relying only on stocks and bonds may not be the optimal way to create and cultivate a diversified portfolio.

One of their service areas is alternative investments, which add a unique and distinctively performing element to a portfolio for further diversification beyond stocks and bonds.

Adding alternative investments can help the investor reduce their risk and optimize their returns.

BlackRock has experience in the area of alternative investing and offers options like the Alternative Capital Strategies Fund, the Real Estate Securities Fund, and the Emerging Markets Long/Short Equity Fund.

### BlackRock Retirement Institute



One of the primary reasons people look to the top-rated investment firms and the biggest investment companies is for retirement solutions, whether they're planning for retirement or they're already there.

BlackRock created the Retirement Institute since [two-thirds of their managed assets](#) relate to retirement. Through the institute, BlackRock provides the means to make better retirement and longevity decisions for clients.

The Retirement Institute looks beyond money and instead provides insights and services based on what BlackRock calls a "broad matrix" of elements that impact retirement security for clients and people around the world.

The ultimate goal is to develop innovation that can then be used to design practical, actionable outcomes.

### Managed Accounts

Another product option offered by BlackRock, one of the biggest investment companies as well as one of the best investment firms, are their managed accounts.

Separately Managed Accounts (SMAs), are often what high net worth investors choose because they offer sophistication and securities direct ownership.

BlackRock represents one of the largest SMA managers, with [\\$72.5 billion](#) in assets under management. The scale of BlackRock provides them with the resources they need to deliver top service to clients.




With SMAs, clients can create and impose their own limitations in terms of how their accounts are managed and can also limit the gains or losses recognized in their accounts.

### Education Center

As a full-service investment firm, BlackRock strives to not only provide products and services to customers as one of the top investment companies but also to provide them with knowledge and educational resources that can empower them regarding their financial decisions.

The BlackRock Education Center includes guides on retirement, college savings, and alternative investments, among other topics.

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<b>Your retirement</b>	<b>College savings</b>	<b>Alternative investments</b>
Planning for retirement can feel overwhelming—from considering how you'll spend your time to sizing up your savings strategy. Fortunately, there are manageable actions you can take to help you stay on track. <a href="#">Dig in &gt;</a>	A college education is an investment that pays dividends well into a child's future. Our library of college information covers helping your child pick the right school, maximizing your child's chance for acceptance and, ultimately, options for financing it. <a href="#">Study up &gt;</a>	Despite what their name may imply, alternative investments are increasingly less of an alternate and more a mainstream option for many investors seeking to expand their reach beyond traditional asset classes. <a href="#">Learn more &gt;</a>

*Source: BlackRock Education Center*

Each covered topic area looks at everything from the basics of these areas of financial and investment management to how to take action and optimize your strategies for the best returns.

***Related: [Best Current Accounts—UK](#) | [Ranking](#) | [Current Account Interest Rates](#)***

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## BNY Mellon Insurance Review

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BNY Mellon was started by Alexander Hamilton in 1784, making one of the longest-running financial institutions in the world, with a history of more than 230 years.

As one of the largest investment companies and one of the top-rated investment firms, BNY Mellon has \$29.5 trillion in assets under custody or administration and \$1.7 trillion in assets under management.

BNY Mellon is one of the top investment companies, providing management, investment services, and wealth management for people located in more than 100 global markets including North America, Asia-Pacific, Europe, the Middle East and Africa, and Latin America.

## **Key Factors That Enabled This to Rank as One of the Top Investment Companies**

Main reasons BNY Mellon is part of this list of the largest investment companies in the world and the best investment companies are detailed below.

### Innovation

Throughout its long history, BNY Mellon has remained dedicated to innovation, which is a big component that's led to their success as not only one of the largest investment companies in the world, but also one of the top investment firms.

BNY Mellon has worked to create new applications for capital market growth, and also tools, platforms, and resources that help people invest more successfully.

Some of their recent innovation initiatives include the NEXEN digital ecosystem, as well as the global Innovation Centers. BNY Mellon has also been partnering with fintechs to change how financial services are delivered and bring clients together with more advanced technologically driven solutions.

### Industry Segments

BNY Mellon is unique from many of the other biggest investment companies because they specialize in industry segments. This means that regardless of the industry you're in, you're going to customized management services that are designed to meet your distinctive needs.

Industry segments served by BNY Mellon include the following:

- Advisors
- Alternative asset managers
- Banks
- Broker-dealers
- Consultants
- Corporations
- Family offices
- Healthcare
- Individuals and families
- Insurance companies

- Investment managers
- Public and not for profit organizations
- Registered investment advisors
- Sovereign institutions
- US federal government
- Wealth managers

### Boutique Approach

One of the primary ways BNY Mellon is unique even from other top-rated investment firms is because of their boutique approach to investment management.

BNY Mellon may be one of the largest investment companies in the world, but at the same time, they deliver services as if they're a boutique investment firm.

BNY Mellon's family of companies features globally diversified investment boutiques, wealth management, and global distribution companies.

This brings clients the benefits of a full-service investment firm paired with highly tailored expert advice, and each "boutique" maintains its own style and strategy.

### Investment Strategy

The basis for investment strategies offered by BNY Mellon, one of the best investment companies and also one of the largest investment companies, is that successful investing begins with a smartly diversified portfolio.

The ideal portfolio should offer a sense of flexibility amidst changing markets, and risk limits should be definitive.

Investment strategies and portfolio options offered by BNY Mellon, one of the top investment firms, include:

- Global equities
- Specialized fixed income and credit
- Liquid and illiquid alternatives
- Cash and currency management
- Global and tactical asset allocation
- Outcome-oriented solutions

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# Fidelity Investments Review

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For **70 years**, Fidelity Investments has been one of the top investment companies, and it has also grown to become one of the biggest investment firms.

Fidelity has a set of defined standards for how it operates and provides service to clients. These include working with a sense of responsibility, integrity, compassion, and expertise.

Fidelity offers personal investment, as well as workplace investing, institutional investment, institutional asset management, and it also operates Fidelity Charitable, which is an independent public charity.

## **Key Factors That Allowed This to Rank as One of the Best Investment Firms**

When considering the best investment firms and the largest investment companies in the world, the following details represent some reasons Fidelity was included in this ranking.

### Pricing

When investors are selecting from the top investment companies, one of their primary considerations is often the pricing and fees they'll have to pay.

Fidelity operates with the idea that fees matter, and transparency in pricing is important.

Not only do they offer some of the most competitive pricing even compared to many other top investment firms, but they are also very transparent about that.

There are no annual account fees, and the minimum to invest is low. U.S. online equity **trades are significantly lower** than Schwab, TD Ameritrade, and E\*Trade, and there are no transaction fees when clients choose from thousands of funds, which include both Fidelity and non-Fidelity options.

Fidelity provides charts of their portfolio advisory fees as well, so investors always know what they're going to be paying.

**Our low pricing**

**Trading fees**

Stocks & Options	ETFs	Bonds & CDs	Mutual Funds
\$7.95 per stock or options trade  plus \$0.75 per contract on options	\$0 per trade for commission-free purchases of select Fidelity and iShares® ETFs  \$7.95 per trade for all other ETFs	Save an average of \$13 per bond <sup>3</sup>  \$1 per bond for secondary bond trading and free for U.S. Treasuries traded online <sup>4</sup>	\$0 for Fidelity funds and hundreds of other funds with no transaction fees <sup>5</sup>  \$49.95 per purchase on all other funds. \$0 on redemption

[Get detailed pricing and see how we compare to others.](#)

*Source: Fidelity Low Pricing*

## Tailored Planning and Advice

As one of the biggest investment firms and one of the top-rated investment firms, Fidelity provides highly personalized and tailored advice to bring the maximum amount of value to clients' lives.

Fidelity's expert financial and investment advisors can help clients navigate their strategies as their lives change, whether they're looking for the best investment companies for beginners, or they have much more complex wealth management needs.

Fidelity offers no-fee, one-on-one reviews of investment accounts, including the ones kept outside of Fidelity. Fidelity financial professionals also bring to the table some of the best research in the industry and the necessary skills to address a variety of needs, from simple to complex.

## Active Trader Pro

When reviewing and ranking the top 10 investment companies and the biggest investment firms, technology and proprietary offerings were important.

Fidelity is one of the top-rated investment firms for many reasons, including their signature Active Trader Pro Platforms.

This lets users maximize the value they derive from online trading and portfolio monitoring.

This customizable desktop and web-based platform lets clients create their own personal online trading experience with streaming, customizable quotes, and watch lists, as well as real-time integrated balances, history, and positions.

This platform also includes advanced trading tools, portfolio management tools, and shortcut options.

This platform is available to Fidelity customers trading 36 times or more in a rolling 12-month period.

***Popular Article: [Best Credit Unions in London and Other UK Cities | Ranking & Comparison Review](#)***

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## **J.P. Morgan Asset Management Review**

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One of the top-rated investment firms as well as one of the largest investment companies in the world, [J.P. Morgan Asset Management](#) is part of the larger J.P. Morgan company.

J.P. Morgan is a world leader in terms of financial services, working with corporations, governments, and institutions.

J.P. Morgan has clients in [more than 100 countries](#) and has a history of [more than 200 years, starting in 1799](#).

Along with being one of the top investment firms, services offered by J.P. Morgan include treasury services, commercial banking, private banking, and wealth management and brokerage.

### **Key Factors That Enabled Us to Rank This as One of the Top 10 Investment Companies**

When developing this list of the best investment firms, the following are some of the key reasons J.P. Morgan Asset Management was included.

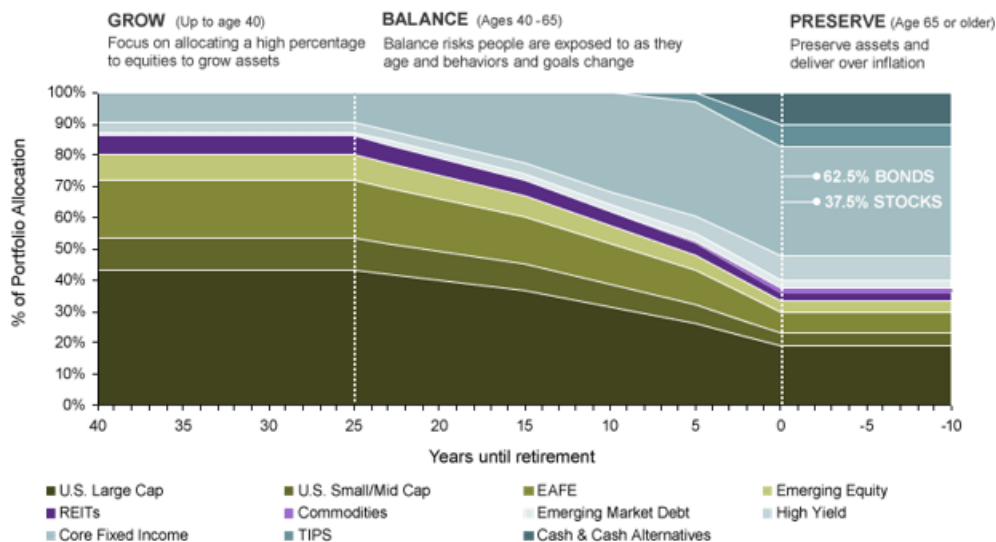
[SmartRetirement Target Date Funds](#)

One of the signature product offerings available to clients of J.P. Morgan, one of the biggest investment companies and also one of the best investment companies, is the SmartRetirement Target Date Fund option.

The focus of this is on retirement outcomes, and the goal of J.P. Morgan is to help participants get the income-replacement levels they need and want to be comfortable in retirement.

These outcomes are delivered through risk-adjusted returns offered throughout the entirety of participants' retirement investment outlook. These funds are managed by the Multi-Asset Solutions group, which is a worldwide team of more than 100 investing professionals in London, New York, and Hong Kong.

This team has access to more than 500 investment strategies paired with proprietary insight into asset allocation, risk management, and selection of investments.



*Source: J.P. Morgan SmartRetirement Target Date Funds*

### Advisor-Guided 529 College Savings Plan

A product offering available to clients of this selection for one of the top 10 investment companies is the Advisor-Guided 529 College Savings Plan, which is sponsored by the state of New York and is a tax-advantageous way for families to save for the cost of higher education.



There are numerous benefits to this plan, including the tax-deferred growth of investment earnings and tax-free withdrawals for expenses that qualify. There are also estate planning and gifting benefits.

Clients can use funds at any eligible institution, whether public or private, and it can be applied toward not only tuition but also room and board, books, and other higher education expenses.

Clients can control how the assets are invested and distributed. There is a low initial contribution minimum of only **\$1,000 per account**.

### Account Services

When an investor opens an account with J.P. Morgan, one of the largest investment companies in the world, as well as one of the top investment firms, they receive access to the following services and benefits:

- Dividend reinvestment
- Systematic investment plans
- Exchange privilege
- Convenient withdrawals
- Shareholder reports
- Account statements
- Telephone services

### Tax Advantaged Investing

As mentioned at the start of this review and ranking of the best investment companies, a key to being one of the top-rated investment firms is the ability to have access to tax-advantageous investment strategies.

This is an area J.P. Morgan, as one of the best investment companies, specializes in. When an investor works with a firm offering these tax planning strategies, they can reduce their IRS liabilities and keep more of their earnings.

With tax-advantaged investing from J.P. Morgan, accounts have the potential to compound and grow faster. Depending on the account and strategy a client selects, taxes may be deferred until withdrawals begin, or they might be altogether eliminated.

Some of the strategies J.P. Morgan offers to help clients cut taxes include tax-free municipal bond funds, investing for dividends, contributing as much as possible for tax-advantaged accounts, and long-term investing strategies.

***Read More: [Best Free Checking Account Banks \(Reviews\)](#)***

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## Northern Trust Asset Management Review

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One of the top investment firms and also one of the largest investment companies, [Northern Trust](#) is a Chicago-based financial institution with a history dating back to 1889.

Now, Northern Trust has more than [20 locations](#) throughout the world and [16,500 employees](#). As of June 2016, Northern Trust had [\\$122 billion](#) in banking assets and [\\$906 billion in assets](#) under management.

Northern Trust is one of the largest investment companies in the world and also one of the best investment companies, serving the needs of individuals and families as well as hedge funds and corporate brands.

### **Key Factors Leading Us To Rank This as One of the Best Investment Companies**

When creating this list of investment companies, the following are some criteria that resulted in the ranking of Northern Trust as one of the best investment firms.

#### Goals Driven Investing

The approach taken by Northern Trust, and one of the main reasons it's included on this list as not only one of the biggest investment companies but also one of the best investment companies, is called Goals Driven Investing.

This trademarked approach means that Northern Trust looks the specific goals an individual client has for the future.

The strategy is based on both the concerns and aspirations of the client, with a resulting portfolio that helps the client achieve their objectives, while also considering the impact of things like taxes and inflation.

This approach lays out an integrated strategy that empowers the clients of this selection for one of the best investment firms to understand what they need to reach their lifelong goals.

The Goals Driven Investing approach looks at performance in terms of not only returns but also progress toward meeting outlined goals.

### Private Passport

Private Passport is another signature offering available from Northern Trust, one of the biggest investment firms and also one of the world's top-rated investment firms.

The Private Passport takes the concept of traditional online banking and transforms it into a full-scale wealth management platform.

Through Private Passport clients can manage all of their accounts in one location.

This online wealth management and investment management platform is designed to provide simplicity and a user-friendly interface along with easy management of complex financial portfolios.

### Learning to Manage Wealth

Since the investment services offered by Northern Trust are so individualized and tailored to the specific client, they're also driven by the phase of investing that a client is in at any particular time.

The primary place where clients can begin with Northern Trust is described as "learning to manage wealth."

This starting point highlights the fact that wealth creation isn't a single event but is instead a journey.

Under the umbrella of "learning to manage wealth" are specific services including investing, trust and estate, banking, wealth planning, and family office.

This lets clients of this selection for one of the top investment firms manage every aspect of their financial picture with one firm.

This is one of the many reasons Northern Trust is not just one of the best investment firms in general but is one of the best investment companies for beginners.

### Brokerage Services

Another area clients of Northern Trust have access to are brokerage services. Northern Trust delivers their consistently tailored investment advice along with high-level brokerage services.

When a client depends on Northern Trust, they receive a complete portfolio of investment services, allowing them to align their investment strategy and personal portfolio with their goals and objectives, as well as their risk tolerance.

Brokerage and investment services from Northern Trust also include real-time account and market information and the ability to do online trading and tracking, as well as setting up customized alerts.

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## **PIMCO Review**

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One of the most respected and largest investment companies, **PIMCO** has more than **2,200 global employees**, **13 offices** located throughout the Americas, Asia, and Europe, and a team of more than **700 worldwide investment experts**.

PIMCO also has more than **\$1.5 trillion in assets** under management as of June 2016.

The primary goal of everything PIMCO does, as well of the most recognized top investment companies, is based on helping investors preserve and grow their assets.

PIMCO is one of the top investment firms for individuals as well as institutions and financial advisors.

### **Key Factors That Enabled This to Rank as One of the Top Investment Companies**

Compared to the biggest investment firms, the following are some reasons PIMCO is ranked as one of the top 10 investment companies.

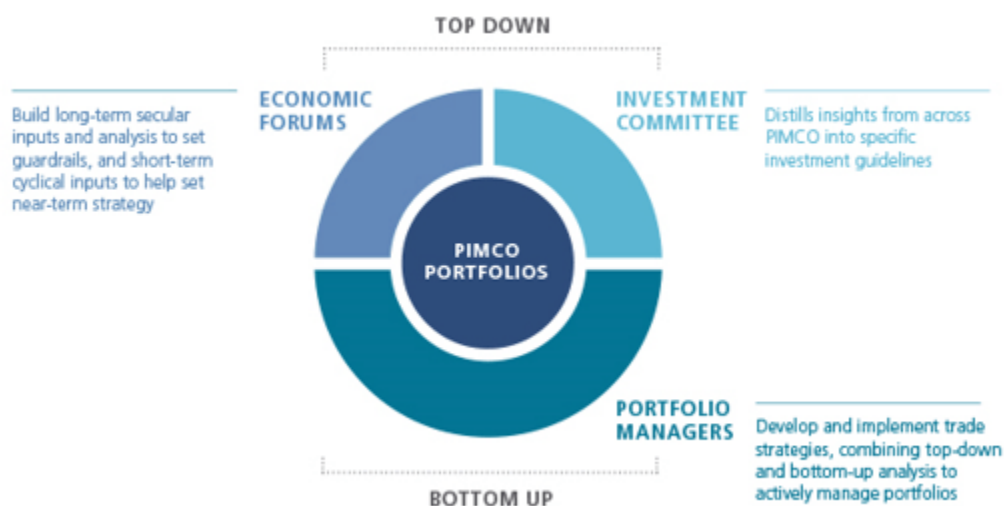
### The Investment Process

Each of the names on this list of investment companies that are the largest investment companies and also the top-rated investment firms have a distinctive approach and process they rely on.

At PIMCO, this process has been honed and refined over many decades, and it includes insights from the PIMCO Cyclical Forums and the annual Secular Forum.

Cyclical Forums look at market and economic trends in the short term, while the Secular Forum provides projections for the coming three to five years.

These top-down perspectives are then paired with bottom-up input from specialists. All of the decisions are driven by the Investment Committee, which includes only the most senior investment professionals.



*Source: PIMCO Investment Process*

### Income Fund

One of the top products available to investors from PIMCO, one of the world's best investment firms, is called the PIMCO Income Fund. This is designed for

the current climate, which is marked by low yields and high volatility, with an approach optimized for income investing.

The PIMCO Income Fund is designed to provide a high, steady level of income with diverse sources. There is an emphasis on risk management, and the fund has consistently delivered monthly dividends, in spite of market changes.

The PIMCO Income Fund has a [five-star rating](#) with Morningstar, and it was called the Best Thomson Reuters Lipper Multi-Sector Income Fund of 2016.

### Short-Term Strategies

In many instances, investors aren't necessarily just looking for long-term investment strategies, but instead are searching for the best investment firms that also offer value-creating, diverse short-term strategies.

PIMCO is not only one of the largest investment companies and one of the best investment companies, but they also feature some of the most comprehensive and well-rated short-term investment strategies.

Potential advantages of short-term strategies from PIMCO, one of the world's best investment companies, include return potential above cash, capital preservation, liquidity for non-immediate needs, low volatility as compared to more risky assets, and they are complementary to traditional bond allocations.

### Pension Solutions

PIMCO is not only one of the top 10 investment companies and one of the biggest investment firms, but they also have more than [40 years' experience](#) working with defined benefit plans.

PIMCO understands the unique challenges faced by defined benefit plan sponsors, ranging from uncertain markets to regulations. PIMCO has a pension solutions team that can help everyone, including the sponsor and the participants, get the best outcomes.

All of PIMCO's pension solutions are based first and foremost on client needs. The pension team of PIMCO, one of the world's top investment firms, delivers customized solutions.

Pension solutions begin with analyzing, then structuring is based on liability benchmarks, tailored asset portfolios, and overlay solutions. The next steps including monitoring, and ongoing collaboration and dynamic adjustment over time.

***Related: [Best Banks in Tennessee \(Ranking & Review\)](#)***

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## **Conclusion—The Top 10 Investment Companies**

The decision to work with the world’s biggest investment firms isn’t one many investors take lightly, as they shouldn’t.

Choosing the top investment companies is important because these firms are going to determine the course you take with your money and how it will grow.

The names on this list of the best investment firms excel in many ways, from being the best investment companies for beginners, to the largest investment companies with access to global markets and resources.

Regardless of each of their differences, the names of the best investment companies on this list perform well in some key areas including their philosophy and approach to investing, their fees, and their reputation.

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## PREVIOUS RANKING | 2016 RANKING TOP INVESTMENT COMPANIES

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### **Conducting an Investment Advisor Search for Top Investment Companies**

There are many ways to conduct an investment advisor search to find top investment companies. You can review the list of top investment advisor companies that we have provided in this review article.

In addition, you can use the [investment advisor search](#) website to search through a database of over 29,000 investment advisor firms.

When performing your investment advisor search, you can sort by state, country, name, and assets under management. Another option for searching investment advisor companies is via the [U.S. Securities and Exchange Commission database](#).

### **Finding Top Investment Companies**

Learning what to do with the money you earn is one of the hardest problems many professionals are faced with.

Performing an extensive investment advisor search and then wading through the seas of options to figure out which ones are the best investment companies can require a lot of research and hard work – especially if you are unfamiliar with the investment advisory landscape.

Hopefully, that is no longer the case. If you are looking to conduct an investment advisor search to identify a top investment firm, the list of the 10 best investment companies presented below can help you start your search for a top investment firm.

You can also view this list of [top wealth management firms and best financial advisors](#).

### **List of the Top 10 Investment Companies**

Sorted Alphabetically:



- Betterment
- Charles Schwab
- Edward Jones
- Fidelity Investments
- Merrill Lynch
- Morgan Stanley
- Raymond James
- RBC Wealth Management
- Vanguard
- Wells Fargo

Before going into the selection factors used in ranking these top ten investment advisor firms, let us take a step back and review what investment firms actually do.

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## **What Do Investment Companies Do?**

Understanding the answer to the question above is critical in understanding who the best investment companies actually are.

Essentially, an investment company's job entails investing client funds and earning a rate of return that is higher than what the firm is charging its clients to manage their money.

There is a wide range of financial instruments, and the best investment companies follow strategies that allow them to continually beat the market. Beating the market normally means performing better than the S&P 500 index.

However, beating the market is not always a given possibility. An investment advisor company that beats the S&P 500 index this year might do poorly next year.

## **Methodology for Selecting Top Investment Companies**

It is important to remember that the “best investment companies” and the “best investment companies for you” might be different things.

As such, you’ll need to define what you want your advisor to achieve for you before you start combing through the database to find investment companies. Things to determine include your risk appetite and time horizon.

For instance, a young person looking to grow his or her wealth and a mid-career professional nearing retirement might require very different investing strategies and tools.

In addition, you'll need to determine whether or not you need an investment advisor that you can meet in person on a regular basis or if electronic, phone, and other long-distance communication works for you.

Different firms have different levels of "hands-on" approaches with their clients, and chances are that, unless you're a high-net-worth individual, only smaller companies will give you any significant amount of in-person time.

It is also very important to evaluate the fees that a given investment company charges.

First of all, the best investment companies will always be very upfront and honest about what types of fees they charge for their services.

Second, you need to look for fees that fit within your investing level.

If you're starting to invest with a small amount of money, you need to make sure that you are not doing business with a company that will negate any money you make by charging you sky-high fees.

Those high-fee companies are better suited to high-net-worth individuals, who can afford to lose more on each transaction.

You also need to consider the minimum balance you will need to deposit in order to access certain services at these companies.

Most large investment companies have different tiers of service. You will be offered different account options based on how much you can deposit.

In the chart below, we have outlined some of the account types and minimum balances required by the selected top investment companies.

<b>Company</b>	<b>Account Example/Deposit Minimum</b>	<b>Account/Fee Example</b>
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Charles Schwab	Schwab Managed Portfolio/\$25,000	Schwab Managed Portfolio/0.9%
Edward Jones	Edward Jones Advisory Solutions/\$50,000	EJ Advisory Solutions/1.35-1.5%
Fidelity Investments	BlackRock Diversified Income Portfolio/\$200,000	BlackRock/0.55-1.1% (based on total assets)
Merrill Lynch	Not disclosed	Not disclosed
Morgan Stanley	Choice Select	Choice Select/2.05% with 300-350K principal.
Raymond James	Sweep Accounts/None	All Accounts: annual Maintenance fees
Wells Fargo	Managed Portfolio/\$25,000	Varies according to total assets
Vanguard	Voyager Services/\$50,000	Voyager Services: \$7/trade
Betterment	No minimum deposit requirement	\$50,000/\$10 per month
RBC Wealth Management	RBC Managed Portfolios/\$100,000	Sliding scale based on assets

## **Brief Overview of These Top Investment Companies**

### **Charles Schwab**

Charles Schwab offers a full slate of investment services.

The firm provides an online brokerage option that allows investors to self-manage their own investing.

Charles Schwab also has its own financial products, including mutual funds that investors can invest in at a low cost.

The company also offers portfolio management services in which a Charles Schwab money manager will manage your portfolio.

### **Edward Jones**

Edwards Jones has a strong North American presence that is made up of thousands of small branches across the United States and Canada.

As such, Edward Jones might be a top investment advisor for those searching for advisors that are located close to their place of residence or work.

Edward Jones investment advisors work in small-office settings; a structure that has been designed to encourage personalized services.

### **Fidelity Investments**

Fidelity has more than \$4.6 trillion worth of assets under its administration.

Companies of this size are normally focused on catering to high-net-worth clients, but Fidelity offers a number of investment services that are well-suited to every type of investor, such as its retirement investment portfolio.

### **Merrill Lynch/Bank of America**

Merrill Lynch/Bank of America has more than 25 million customers, making it another global banking powerhouse.

When Bank of America and Merrill Lynch merged, the combined company became the single largest brokerage firm in the world, which warrants its consideration among the list of best investment companies.

Due to its size, the company is also able to attract some of the best investment talent in the world.

## **Morgan Stanley**

Across the globe, [Morgan Stanley Investment Management](#) has more than \$396 billion worth of assets under management.

The company offers a number of investment options for investors, large and small, and a full suite of wealth management services for wealthy investors.

## **Raymond James**

The Raymond James' company slogan is “Life well planned,” and the company earns that motto by offering a huge slate of investment services.

Whether you are planning for retirement or looking to create an income investment plan, Raymond James can be a great option as a top investment advisor.

The company manages more than \$479 billion worth of assets under management and has more than 6200 financial advisors working in offices around the globe.

## **Wells Fargo**

As with many of the best investment companies listed on this article, [Wells Fargo](#) offers an online, self-managed investment service, as well as professionally managed portfolio services.

The firm has a subsidiary called The Private Bank, which provides personal financial management services for high-net-worth individuals.

The Private Bank was named as a top wealth management firm by the National Law Journal.

## **Vanguard**

[Vanguard](#) is known primarily as one of the largest mutual fund companies in the industry.

However, the company also offers a full range of investment tools for the private investor.

Services are structured based on the level of help that a client needs.

Vanguard also provides self-directed investing options, but with a supporting Certified Financial Planner that can provide guidance when required.

## **Betterment**

In the world of investment companies, [Betterment](#) is a relatively small company.

Yet, it has been making headlines due to its tech-savvy approach in investing and in catering to people with less money to invest.

Betterment bases its investing principles around its three primary account models: Safety Net, Retirement, and Build Wealth.

## **RBC Wealth Management**

Founded in 1869 in Canada, the Royal Bank of Canada has a strong presence in Canada and also in the United States.

[RBC Wealth Management](#) has been helping to build and preserve its clients' wealth for more than 100 years.

The firm, rated as one of the world's top 10 largest wealth managers, is a segment of the Royal Bank of Canada (RBC), offering the discipline, strength, and stability of Canada's largest bank.