

Top 9 Financial Advisors in Dallas, TX | 2017 Ranking | Dallas Area Wealth Managers

2017 RANKING & REVIEWS TOP RANKING FINANCIAL ADVISORS IN DALLAS, 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.

Deciding to hire a financial advisor comes with a lot of questions. Where do I find a great wealth management firm in Dallas? How can I trust my Dallas financial advisor to put my interests first?

These questions are just the tip of the iceberg. There are many 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. We have published our findings in the sections below, starting with a list of the top 9 advisors, financial planners, and registered investment advisors in Dallas.



Award Emblem: Best 9 Financial Advisors in Dallas, TX

AdvisoryHQ's List of the Top 9 Best Financial Advisors in Dallas

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

- [**Beaird Harris Wealth Management**](#)
- [**Brennan Financial Services**](#)
- [**Chessman Wealth Strategies**](#)
- [**Clintsman Financial Planning**](#)
- [**Heritage Financial Planning**](#)
- [**HFS Wealth Management**](#)
- [**Lee Financial**](#)
- [**SFMG Wealth Advisors**](#)
- [**Tolleson Wealth Management Investment**](#)

Top 9 Financial Advisors in Dallas, Texas | Brief Comparison

Firm	Highlighted Features
Beaird Harris Wealth Management	Young Professionals program
Brennan Financial Services	Comprehensive investment strategies
Chessman Wealth Strategies	Faith-based financial planning
Clintsman Financial Planning	Free one-hour consultation
Heritage Financial Planning	Financial & lifestyle resources page
HFS Wealth Management	Total digital access
Lee Financial	Whole Vision approach
SFMG Wealth Advisors	Executive wealth management
Tolleson Wealth Management Investment	Private banking

Table: Top 9 Best Financial Advisors in Dallas | Above list is sorted alphabetically

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services and products that are ranked on its various top rated lists?

Please click here "[AdvisoryHQ's Ranking Methodologies](#)" for a detailed review of AdvisoryHQ's selection methodologies for ranking top rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Top Ranking Best Wealth Management Firms in Dallas

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

[See Also: Top Financial Advisors in Tampa & St. Petersburg, FL | Ranking | Tampa & St. Petersburg Wealth Managers](#)

Beaird Harris Wealth Management Review

[Beaird Harris](#) started out as a CPA firm, meant to make taxes a pain-free process for its clients. Since then, they have grown to include wealth management services, but they still stay true to their roots as tax specialists. And it's a good thing, too since taxes are a crucial part of proper wealth management.

Beaird Harris is a [fee-only](#) wealth management firm in Dallas.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Dallas

Specialization in Tax Services

You can prepare a wicked financial plan and realize above-average returns, but without a proper understanding of the tax implications, a hefty portion of your earnings or the money you set aside for your heirs will head to Uncle Sam.

Beaird Harris is a wealth management firm in Dallas that understands the importance of taxes. They can help you navigate the tricky tax landscape filled with changing regulations and complex rules. Their financial planners in Dallas can help you create a multi-year tax plan that will help you generate wealth.

This Dallas wealth management firm's tax services include:

- Federal tax returns
- State tax returns

- Gift tax returns
- Trust tax returns
- Non-profit tax returns
- Tax planning
- IRS representation
- Sales tax returns
- Resolution of IRS notices
- Estate tax returns

Young Professionals Program

In order to generate wealth, you need to have firm financial footing. This wealth management firm in Dallas offers a program called [Young Professionals](#). It is designed to help young people develop the healthy financial habits they need to effectively build wealth such as paying off student loans, financing a home, and saving for retirement.

This program is exclusively for young people with a high income to help them hit the ground running. Their Dallas financial planners will help young people answer specific questions like:

- How do you effectively and tax efficiently maximize your retirement savings?
- How much can you afford to set aside each month?
- What's the most efficient way to reduce your debt burden?
- Which risk management strategies will best meet your particular needs?

Business Consulting

You know what it takes to run a successful business. Now you need some expert guidance about how to make the most of your business's wealth. It's also beneficial to have an outside expert come in and evaluate what you can do better. Fortunately, this Dallas wealth management firm also offers [business consulting services](#).

Their Dallas financial planners can help you identify where you can grow your business and which operations you can streamline. These Dallas financial advisors have a range of experience in several industries. Beard Harris's specific business consulting services include:

- Acquisition planning
- Real estate services

- Solving business problems
- Expansion planning
- Real estate sales
- Employee compensation
- Succession planning
- Equipment purchases/sales
- Employee insurance
- Business monetization

Brennan Financial Services Review

[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 for retirement planning, wealth accumulation, and tax reduction.



This Dallas wealth management firm does not explicitly state whether they are fee-only or fee-based. We have included them on the list for the following reasons, and we recommend that all customers inquire about their compensation structure during their initial consultation.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Dallas

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 Dallas financial 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. This Dallas wealth management firm's 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 the life you want once you stop 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](#).

Chessman Wealth Strategies Review

[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.

This Dallas wealth management firm is operates on Christian principles and is committed to providing financial advice that is line with those religious principles. They do not clearly indicate whether they are fee-only or fee-based, however, we have included them on this list for the following features.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Dallas

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 Dallas 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 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 in Dallas 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 any pressure 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

INVESTMENT CONSULTING & ADVANCED PLANNING



WEALTH PROTECTION



WEALTH ENHANCEMENT



WEALTH TRANSFER



CHARITABLE GIVING

RELATIONSHIP MANAGEMENT



CLIENT RELATIONSHIPS



PROFESSIONAL MANAGEMENT

In the process of helping you manage your finances, Chessman Wealth has developed a trademarked 6-step system of Discovery, Smart ChoicesStrategy, Mutual Commitment, 45 Day Review, Advanced Planning, and Progress Managing. This comprehensive system allows complete coverage of all of your needs.

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

[Don't Miss: Best Financial Advisors in Minneapolis, MN | Ranking | Minneapolis, Edina Area Wealth Managers](#)

Clintsman Financial Planning Review

Clintsman Financial Planning is a [fee-only](#) wealth management firm in Dallas. They bring experience, objectivity, independence, flexibility, and affordability to the financial advisory game.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Dallas

Comprehensive Financial Planning Services

This wealth management firm in Dallas offers comprehensive financial planning services. Their team of Dallas financial advisors can help with either quick financial issues or long term wealth management. Financial plans and life plans are not set in stone, and Clintsman Financial Planning offers the kind of preparation and flexibility you need to feel comfortable about your future. Their services [include](#):

- Personal Financial Planning
- Retirement planning strategies
- Cash flow spending plan
- College funding advice
- Stock option advice
- Lump sum distribution advice
- Ongoing asset management
- Life and disability insurance needs analysis
- Second opinion on investments or current financial plan
- Financial seminars for military, church, and civic groups
- Corporate employee financial education

These Dallas financial advisors can help you answer a number of pressing questions including:

- How do I ensure my assets will reach my chosen family members?
- Am I saving enough to meet my retirement goals?
- Should I put my extra income towards my savings or debt?

Client-Centric Process

Clintsman's website outlines the [financial planning process](#) clients can expect, so they have an idea of the kind of experience they'll have while working with this wealth management firm in Dallas.

1. Initial Inquiry: upon first contact, receive information about fees, methodology, and philosophy

2. Get Acquainted Meeting: conversation about goals, services needed, and an estimated quote

3. Data Gathering: collection of the financial information needed to get started - half of the fee is paid at this point

4. Analysis & Plan Creation: research is conducted to come up with specific recommendations and plans

5. Presentation: Dallas financial advisors presents the proposed plan and course of action to their client

6. Implementation & Follow-up: advice proposed during the presentation is put into action either on your own or in conjunction with your Dallas financial planner

Free Consultation

Fancy offices and impressive degrees can be important - especially the degrees - but you also want to get along well with your financial advisor. This Dallas wealth management firm offers a free consultation. It's the "Get Acquainted Meeting" step in their process. Potential clients get a free, one-hour meeting with one of the Dallas financial planners at Clintsman.

During this meeting, potential clients discuss their needs, which services they've thought about, and which services their Dallas financial planner thinks may be right for them. This is also where potential clients receive an quote for their specific financial planning needs.

Flexibility

Aside from excellent qualifications and superb people skills, something else potential clients want in a Dallas wealth management firm is flexibility. Let's say you want to hire a Dallas financial advisor to create a plan for you, but you are interested in executing the strategy yourself. This is possible with Clintsman. They can create a plan for you that you can put into action yourself with the option of engaging their services in the future if you wish to follow up.

On the other hand, you can engage this Dallas wealth management firm for a longterm relationship, and leave it to them to manage part or all of your wealth management needs.

[Related: Best Financial Advisors in Atlanta, GA | Ranking | Atlanta Area Wealth Managers](#)

Heritage Financial Planning Review

[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. Heritage is a [fee-only](#) wealth management firm in Dallas.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Dallas

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 in Dallas charge an annual or bi-annual fee for their services. Heritage Financial offers various options 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 in Dallas. His team of advisors are members of numerous professional organizations, and you can see their specific accreditations [here](#).

HFS Wealth Management Review

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 Wealth Management Firm in Dallas

A Comprehensive Team

The team of 18 at this wealth management firm in Dallas 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.

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 this wealth management firm in Dallas 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.

Popular Article: [Best Financial Advisors in New York, NY | Ranking | New York Wealth Management Firms](#)

Lee Financial Review

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!

This team of Dallas financial advisors has seen the markets fluctuate and have plenty of experience to know what works and what doesn't. In addition, Lee Financial is a [fee-only](#) wealth management firm.

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 (or a combined annual income of \$500,000).

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Dallas

Core Values

When founder Richie Lee launched his career as a Dallas financial advisor 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 of financial planners in Dallas 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 that this Dallas wealth management firm does 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. 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 of the [services they provide](#).

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

Read More: [Best Financial Advisors in Austin, TX | Ranking | Top Austin Wealth Managers & Planners](#)

SFMG Wealth Advisors Review

[SFMG Wealth Advisors](#) are all about instilling confidence in their clients. Feeling like you understand your financial situation is a very important part of building financial confidence. Their professionals bring varied backgrounds and years of experience together to craft the perfect financial plans for their clients.

They are a [fee-only](#) wealth management firm in Dallas that is owned by their directors. This means that their Dallas financial advisors are not obligated to push any particular products over others. That independence enables them to offer products only based on which products are best suited for their situation.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Dallas

Their Client Relationship Philosophy

SFMG has a clear mandate. They wish to provide advice that inspires confidence in their clients by producing successful outcomes. These Dallas financial advisors can help clients manage their affairs and live with financial confidence. The core tenets of their philosophy as a Dallas wealth management firm include:

- Promoting and providing total transparency
- Filtering out the nonsense and communicating the essentials
- Eliminating obstacles
- Meeting regularly to ensure you are on course towards your financial goals
- Leveraging the latest research and technology to help clients make the best decisions

Comprehensive Wealth Management

Your SFMG financial advisor in Dallas will coordinate all the various features of your financial planning. This includes coordinating with the team of professionals you likely already work with including attorneys, tax accountants,

and more. This wealth management firm in Dallas will work with you to come up with a financial plan that incorporates all of these players and elements.

This comprehensive wealth management includes the following financial planning services:

- Net worth/cash flow statements
- Education planning
- Corporate benefits
- Retirement planning
- Tax planning
- Advice for business owners
- Insurance planning
- Charitable planning
- Estate planning

Investment Management Services

An important part of financial planning is wealth preservation. Investing your money helps protect it against inflation, especially if that money is meant to be saved for the future. Investing is not a sure thing, but that doesn't mean there aren't strategies for doing it well. Investing your money in a way that limits your exposure while steadily working towards your goals is something that a Dallas financial advisor can help you with.

SFMG's investment management process works as follows:

1. Determine risk tolerance
2. Establish Investment Policy Statement (IPS)
3. Invest Portfolio consistent with IPS
4. Make tactical changes reflecting economics and market conditions
5. Review quarterly performance vs. benchmarks
6. Periodic meetings to review risk tolerance and objectives

Executive Wealth Management

Executives have unique financial situations and busy schedules. This combination of things makes acquiring the services of a Dallas wealth management firm ideal. One of SFMG's Dallas financial advisors can help executives navigate their specific financial circumstances to protect both themselves and their families. These [executive wealth management services](#)

include comprehensive financial planning, investment management, and a coordination of benefits.

This coordination of benefits is meant to help executives bring their personal benefits together with their premium executive benefits to provide optimal impact for them and their family.

Tolleson Wealth Management Investment Review

[Tolleson Wealth Management](#) is a Dallas–based wealth management firm. They do not explicitly state that they are fee-only, however, they [explain](#) that "Our fees are typically quarterly fixed fees, which are based on the amount of assets being managed and services provided."

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Dallas

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 this top wealth management firm in Dallas, clients have extended access to services usually unavailable to individual accounts.

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



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.

This Dallas wealth management firm offers the same services as large corporate institutions, but they do so while still maintaining exceptional personal relationships with their clients.

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

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, these Dallas financial advisors 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

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.

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

After carefully reviewing this list of the top financial advisors in Dallas, you no doubt have a better grasp of which services you may want and need.

But even after whittling down this list to your favorite three or four, you may still be stuck about which wealth management firm in Dallas you wish to pick. So what can you do then?

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. It's also recommended that you write down what you hope to gain out of a relationship with a Dallas financial advisors. 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 in, 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.

Image sources:

- <https://www.bigstockphoto.com/image-70662682/stock-photo-dallas-cityscape-at-the-night-time>
- <http://www.chessmanwealth.com/our-approach/>
- <http://hfs-wm.com/investments.html>
- <https://www.leefin.com/how-we-are-different/wholevision/>
- <https://www.tollesonwealth.com/wealth-management/strategic-services/>

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