

Top 10 Best Financial Advisors in Houston, TX | 2017 Ranking | Houston Wealth Management Firms

2017 RANKING & REVIEWS TOP RANKING FINANCIAL ADVISORS IN HOUSTON, TEXAS

Finding the Top Financial Advisory Firms in Houston, Texas

If what they say is true, and everything really is bigger in Texas, then when finding the right financial advisor in Houston, Texas, you should be presented with bigger and better options too, right?

Well, if you came to this page looking for one of the best financial advisors or wealth management firms in Houston, Texas, you're in luck. Through our extensive research and stringent criteria, we've reviewed several financial planners in Houston to identify the very best.

We weren't disappointed with the results, and we have a feeling you won't be either.



Award Emblem: Top 10 Best Financial Advisors in Houston, Texas

Key Questions—How to Identify the Top Financial Advisors in Houston, Texas

When one makes the decision to hire a financial advisor in Houston, naturally, several questions come to mind.

- Is there a difference between a Houston financial advisor versus a Houston wealth manager?
- What criteria should I consider when choosing the right financial advisor in Houston for me?
- What services are typical and which are extra?

Undoubtedly, you'll wonder what a financial advisor in Houston charges and what the total monetary value of your assets is.

All of these questions are good starting points for identifying the top financial advisors in Houston. If there is one thing that you should do when searching for the perfect financial planner, it's to ask questions. The more you know about the details involved in wealth management, the better equipped you will be to make educated decisions.

You've worked hard to earn the money you have, so you should benefit from a top wealth management firm in Houston that will help you secure a happy and comfortable financial future.

AdvisoryHQ's List of the Top 10 Best Financial Advisors in Houston, Texas

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

- [Avalon Advisors](#)
- [Financial Synergies Asset Management \(See Personalized Review\)](#)
- [Greenbriar Financial](#)
- [Horizon Advisors](#)
- [Houston Asset Management, Inc.](#)
- [Kanaly Trust](#)
- [Oak Harvest Financial Group](#)
- [Strategic Financial Advisors](#)
- [The Financial Advisory Group, Inc.](#)
- [Willis Johnson & Associates](#)

Top 10 Financial Advisors in Houston, TX | Brief Comparison

Top Financial Advisors in Houston	Highlighted Features
Avalon Advisors	Diverse client base
Financial Synergies Asset Management	Fee-Only RIA
Greenbriar Financial	Strategic Tax Partnership
Horizon Advisors	Estate and Trust Services

Houston Asset Management	Scholarship program
Kanaly Trust	Family Office Services
Oak Harvest	Regular seminars
Strategic Financial Advisors	Client-centered wealth management
The Financial Advisory Group, Inc	Tax services
Willis Johnson & Associates	Estate and charitable planning

Table: Top 10 Financial Advisors in Houston | 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 Houston, Texas

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

See Also: [**Best Financial Advisors in Omaha, NE | Ranking | Omaha Wealth Management Firms**](#)

Avalon Advisors Review

[Avalon Advisors](#) is a Registered Investment Advisor (RIA) founded in 2001. While it started operations in Houston, Texas, it has expanded to additional locations in San Antonio as well. Although it remains a Texas-based financial advisor, it serves clients all over the world.

Avalon's approach is comprehensive, offering proprietary global investment management services to individuals, families, and institutions while keeping a client-focused philosophy that allows for exponential growth.

Avalon Advisors is a fee-based wealth management firm in Houston, but we have included them on this list for the valuable services they offer.



Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Houston

Below are key factors that enabled Avalon Advisors to rank one of this year's top investment advisors in Houston, TX.

Global Investment Philosophy

When doing business with Avalon Advisors, you will quickly notice that it is driven by a global vision as it guides you through the best options for your own investment portfolio.

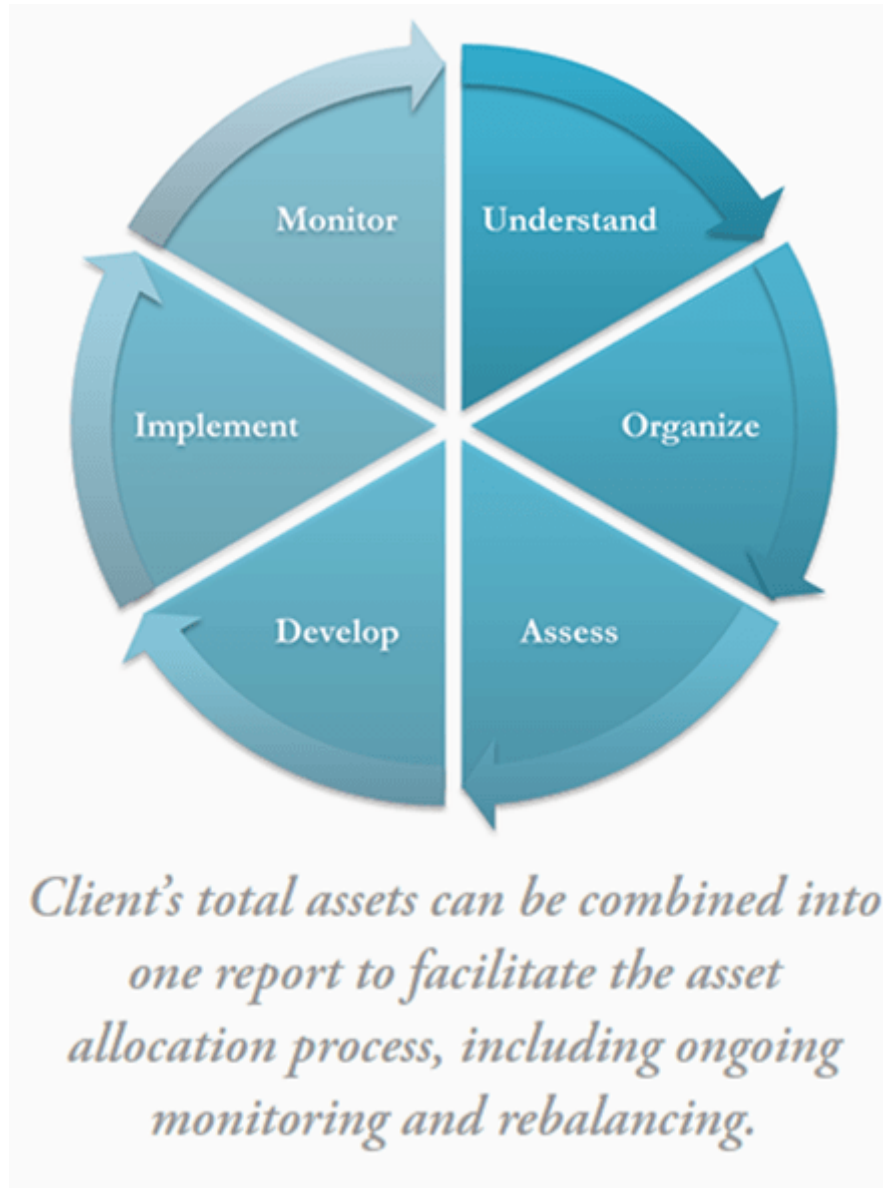
This Houston wealth management firm chooses to invest with an "investor's perspective" rather than a trading mentality. Along with complete risk management and an open line of communication with the client, you can rest assured that your funds are working hard for you.

Additionally, Avalon has created an [Investment Strategy Committee](#) (comprising both domestic and international equity and fixed-income portfolio managers) whose focus is on monitoring global financial markets and economic factors to stay current on the potential effects of the market on each portfolio.

The Wealth Management Process

Your team of Houston financial planners at Avalon knows that no two clients' needs are alike. Due to this, it keeps a flexible, open-minded approach that is customized through what it calls [the Wealth Management Process](#).

The process starts with an initial meeting to get to know you and your investment goals and proceeds all the way through the creation, implementation, and monitoring of your plan. The system used by this Houston wealth management firm accounts for all stages of investment planning.



Investment Services

Avalon Advisors offers a global mix of [proprietary investment strategies](#) that aim for a strong risk/return spectrum. With the addition of an external alliances, clients have even more access to complementary investment services.

Clients of this wealth management firm in Houston have access to a number of different equity markets. Their Houston financial advisor will work with them to establish the appropriate risk and asset allocation for their personal circumstances and goals.

Registered Investment Advisor

In agreeing to become a Registered Investment Advisor, the team of Houston financial advisors at Avalon applies its years of experience in the market and its wealth of success to meet RIA requirements. This designation goes a long way toward providing clients with the peace of mind necessary to know a given wealth management firm in Houston is obligated to look out for their interests as opposed to their bottom line.

Serving a Variety of Clients

While many financial advisors in Houston do business with a specific type of client in mind, you can enjoy a broader approach through Avalon Advisors.

These Houston financial planners happily works with individual clients, families with more far-reaching investment needs, and institutions which may have a large employee base.

Financial Synergies Asset Management Review

[Financial Synergies Asset Management](#) is an independent financial advisor in Houston, TX, that specializes in offering general financial planning, investment management, and retirement planning services to its clients.

As one of the top-rated financial advisors in Houston, the company has a diverse array of clients ranging from younger investors with an aggressive investment philosophy, to older, more mature retirees who prioritize fixed income generation.

Financial Synergies Asset Management is a [fee-only](#) wealth management firm in Houston.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Houston

The following factors were instrumental in Financial Synergies Asset Management being rated as a top 2017 wealth management firm in Houston.

Experienced and Credentialed Team

The company's team of investment advisors and financial planners in Houston brings [more than 80 years in combined experience](#) to the table when handling client needs. This track record means clients are able to benefit from the experiences of a team of highly seasoned financial advisors and planners.

Independent Advice

Financial Synergies Asset Management is an [independent](#) Houston financial advisor, with no commission-based affiliations to any financial institution or wealth management business. Due to this independence, the firm's advisors are able to deliver unbiased, conflict of interest-free advice to their clients.

Fee-Only Investment Advisory Firm

Because the firm is not employed by any broker-dealer or financial service or product vendor, the company relies solely on advisory revenue generated through client engagements. As a [fee-only](#) financial advisor in Houston, the firm is able to deliver true value for money to its clients by placing their interests above all others.

Certified Financial Planners (CFPs)

The firm's Houston financial advisors [carry the Certified Financial Planner \(CFP™\)](#) designation; which is proof of an individual's demonstrated skill, education, and ability to deliver advice to the highest professional standards within the financial industry. The CFP™ Board independently enforces these standards across the industry.

Registered Investment Advisors (RIAs)

Financial Synergies is a [registered investment advisor in Houston](#) whose advisors provide non-affiliated, unbiased advice to their clients. As an RIA, the company is registered and regulated by the U.S. Securities and Exchange Commission (SEC) to deliver independent advice to its clients.

Fiduciaries to Clients

As RIAs, the company is subject to the provisions of the Investment Advisers Act of 1940, which mandates a fiduciary duty to its clients. Simply put, this

means that the firm is legally and professionally bound to put a client's interest above those of the firm or its individual advisors.

[Don't Miss: Best Financial Advisors in Miami & Coral Gables, Florida | Ranking | Miami & Coral Gables Wealth Managers](#)

Greenbriar Financial Review

[Greenbriar Financial](#) takes an integrated, collaborative approach to wealth management. They start with a focus on asset allocation before moving on to other areas of financial planning. Their Houston financial advisors take the time to understand the financial goals and priorities of each client and seek to understand the psychology behind the decisions their clients make.

Greenbriar Financial is a [fee-only](#) wealth management firm in Houston.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Houston

The following factors were instrumental in Greenbriar Financial being rated as a top wealth management firm in Houston.

Comprehensive Wealth Management Services

For many clients, a one-off relationship with a Houston financial advisor does not hold much interest. Instead, they seek to establish a long-term relationship with an advisor who will help them create a plan, implement it, monitor its progress, and make adjustments as needed.

In this case, it helps to work with a Houston wealth management firm that is a one-stop-shop for all your financial planning needs. Services offered by Greenbriar Financial [include](#):

- Financial advice and management
- Retirement plan rollovers
- Comprehensive financial planning
- Severance package consultation

- Divorce financial analysis
- Investment management
- Asset protection strategies
- Estate planning
- Trust services

Strategic Tax Partnership

A good wealth management firm knows when to consult outside experts. Greenbriar Financial maintains a [strategic partnership with Frierson Sola Simonton & Kutac PLLC](#) for tax planning services. They are completely separate from Greenbriar, allowing the Houston wealth management firm to maintain its independence, but they are partners when it comes to helping clients with the tax implications of their investments.

In fact, tax planning plays a significant role in successful wealth management. Clients who do not consider the tax implications of their financial choices and changes could face a serious tax bill that causes their accumulated capital to take a hit. Consulting with a Houston financial advisor can help individuals avoid this.

Resources Center

Top wealth management firms in Houston or elsewhere go the extra mile to take care of their clients by providing resources that they can access outside of their meetings. Greenbriar Financial provides a [Resources Center](#) on their website for clients and non-clients who wish to browse the educational information they've made available. Their Resources Center includes a Market

Summary section and archives of their Weekly Economic Commentary and Weekly Market Commentary.

Horizon Advisors Review

[Horizon Advisors](#) has been helping individuals build and protect their wealth [since 1999](#). This Houston wealth management firm's commitment to

cultivating long-term, collaborative relationships allows it to be responsive and proactive to its clients needs.

Horizon Advisors is a [fee-only](#) wealth management firm in Houston.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Houston

The following factors were instrumental in Horizon Advisors being rated as a top wealth management firm in Houston.

All-Inclusive Wealth Management Process

The Houston financial advisors at Horizon Advisors treat wealth management as an ongoing process that includes reviews and adjustments as needed. This process, which clients and their advisors will regularly go through, includes the [following elements](#):

- **Understanding:** An advisor helps the client identify their financial goals and objectives. Relevant financial documents and information is collected.
- **Organization:** A financial advisor in Houston will conduct a comprehensive review of the client's existing financial situation before drafting clear, easy to understand recommendations to review with the client.
- **Management:** Once a client is happy with the proposed financial strategy, their financial advisor in Houston will implement and monitor it. They will also make changes as needed.

Financial Planning

For this wealth management firm in Houston, financial planning serves as the foundation for their wealth management process. They help clients develop an appropriate strategy, identify their personal and financial objectives, and come up with a customized plan. Specific ways Horizon Advisors can help clients [include](#):

- Cash flow analysis
- Investment portfolio analysis
- Legacy and estate advice

- Tax planning
- Retirement planning
- Risk management

Estate and Trust Services

Receiving an inheritance is a bittersweet experience filled with financial opportunities and emotional transitions. It can also be a very complicated and overwhelming process. If you plan on passing wealth along, a Houston financial advisor can help you set things up so that they are as easy as possible for your heirs.

The process isn't just overwhelming for the heirs but for the trustee as well. This wealth management firm in Houston can help in the [following areas](#):

- Investment administration and management
- Setting up the necessary accounts
- Transitioning assets into the proper hands
- Gathering information
- Coordinating of the preparation of any required tax filings
- Help guide families through the process

[Related: Best Financial Advisors in Minneapolis, MN | Ranking | Minneapolis, Edina Area Wealth Managers](#)

Houston Asset Management, Inc. Review

At [Houston Asset Management, Inc.](#), team members live by the slogan, "We hear you. We are here for you."

Since this Houston wealth management firm's [founding in 1980](#), Houston Asset has been providing comprehensive financial planning and investment management opportunities for individuals, businesses, pensions, trusts and estates, charitable organizations, and profit sharing plans.

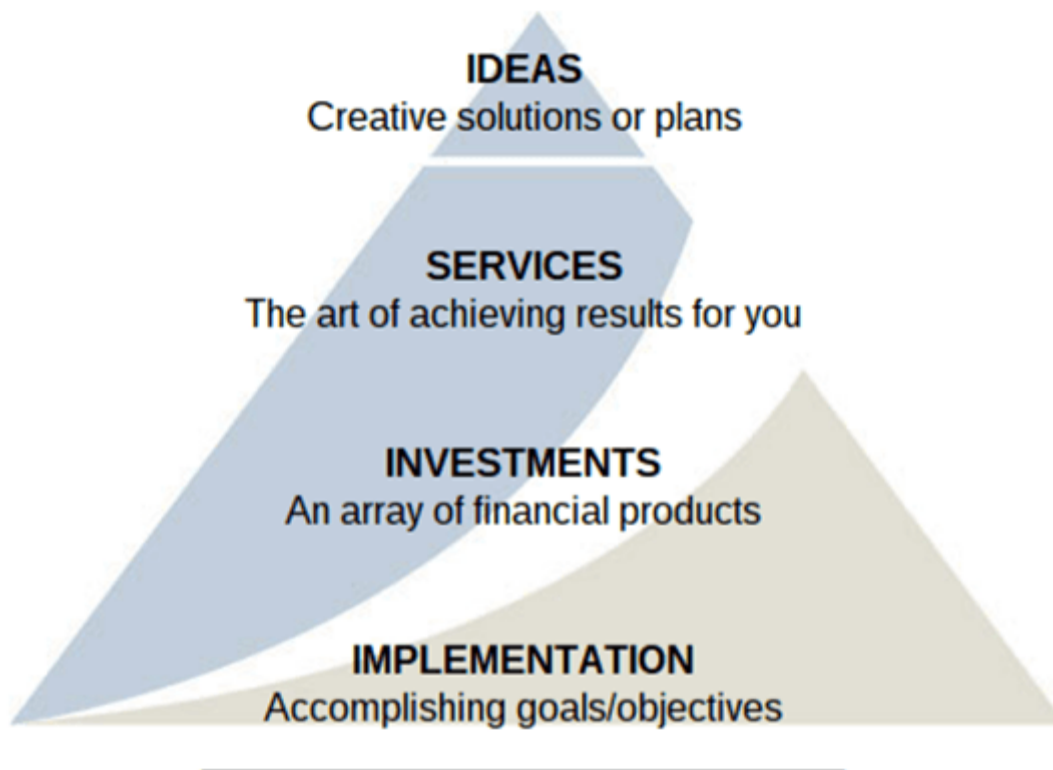
Their website does not indicate whether they are a fee-only or fee-based wealth management firm in Houston, but we have included Houston Asset on the list due to the number of services they provide.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Houston

Below are key factors that enabled Houston Asset Management to be rated one of this year's top rated asset management firms in Houston, TX.

A Clear Mission

With a [team of highly experienced professionals](#), Houston Asset Management believes in providing quality ideas, services, investments, and implementation. Through this core mission, this Houston wealth management firm is able to fully support the needs of its clients.



Comprehensive Financial Planning

The responsibility of becoming a working partner with its clients is something that the team of Houston financial planners at Houston Asset doesn't take lightly. It stands ready with tools and resources that will help guide you in a sound financial direction according to your own personal and financial goals. Financial planning services [include](#):

- retirement planning

- estate planning
- insurance planning (life, disability, long-term care)
- tax planning
- education planning
- budgeting and cash flow planning
- business planning and employee benefits
- investments

Investment Management Services

Each [investment profile](#) is custom tailored to you and accounts for your own personal risk tolerances, objectives, cash flow requirements, and time allotments. Once a comprehensive plan is in place, your team of Houston financial advisors will carefully monitor your portfolio on a schedule that allows for adjustments as necessary.

Financial Resources

As you look ahead to a bright financial future, you have at your disposal several resources offered through Houston Asset Management's website. The following is an overview of [financial resources](#) available to you:

- stock quotes
- market recaps
- financial calculators
- featured news
- articles of interest
- financial briefs

Firm Newsletter

Houston Asset publishes a [newsletter](#) every 2 months that informs clients about the most current market data, things happening within the firm, and other topics of interest.

Supporting Higher Education

Through its Houston Asset Management Charitable Foundation, Houston Asset awards [yearly scholarships](#) to students entering college in support of furthering bright minds. The application process is fairly simple and provides young adults with financial assistance and internship opportunities throughout their university careers.

Kanaly Trust Review

[Kanaly Trust](#) has proudly served clients across Texas and around the world since 1975. This Houston wealth management firm was founded with the intention to help people regain control over their money and use it to improve their present and future lives.

As the Houston financial advisory firm [puts it](#), they "give people the peace of mind to live happy and fulfilling lives."

Kanaly Trust is a [fee-only](#) wealth management firm in Houston.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Houston

Below are key factors that enabled Houston Asset Management to be rated one of this year's top-rated asset management firms in Houston, TX.

Investment Management

[Kanaly Trust](#) starts their relationship with you by conducting a thorough analysis of your current financial situation. This gives their Houston financial planners a solid understanding of what they will be working with. This also helps them determine how realistic your financial goals are.

Kanaly Trust's financial advisors in Houston prepare an Investment Policy Statement for their clients so that their time horizon, risk tolerance, goals, and more are clearly outlined. This also allows for transparency when it comes to the governance of a client's assets.

Their investment philosophy includes the following key [components](#):

- Open architecture platform
- Institutional quality investment solutions
- Long-term capital accumulation
- No fees or commissions
- Managing family assets

Financial and Estate Planning

This wealth management firm in Houston is all about reducing the number of financial worries and stresses in their clients' lives. They set the stage for an inclusive and collaborative long-term relationship that allows clients to rest easy knowing that their money and their financial future is in good hands.

The Houston financial advisors at Kanaly Trust will work with a client's family and other financial professionals to achieve true collaboration and comfort throughout the process. Their team of Kanaly financial advisors will be led by a dedicated Relationship Manager.

This wealth management firm in Houston offers the following [financial and estate planning services](#):

- Estate and wealth transfer planning
- Tax planning and strategies
- Executive financial planning and benefit analysis
- Real estate, oil, and gas services
- Business succession planning
- Charitable gift planning
- Risk management considerations
- Financial and retirement planning

Family Office Services

Kanaly Trust offers Family Office Services to clients who need helping managing and preserving wealth across generations. It is not uncommon for huge fortunes to be squandered due to poor financial planning, wealth transfers, and financial education. This Houston wealth management firm can help avoid this.

This Houston financial advisory firm offers the following [Family Office services](#):

- Coordination of financial strategies
- Family philanthropy
- Financial data aggregation and reporting
- Lifestyle enhancement
- Wealth transfer planning
- Family continuity and education
- Trustee services

Popular Article: [Best Financial Advisors in Indianapolis, IN | Ranking | Indianapolis Wealth Managers](#)

Oak Harvest Financial Group Review

What you'll find at [Oak Harvest Financial Group](#) is a dedicated, Houston-based financial advisor whose sole purpose is to help individuals, businesses, and investors plan for and move through retirement.

Oak Harvest has a desire to fully educate clients and help them build a financial plan that moves with them through the future.

Oak Harvest is a fee-based wealth management firm in Houston, but we have included them on the list for the range of services they offer.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Houston

Below are some key factors that we like about Oak Harvest Financial Group that allowed it to be rated as one of this year's top-ranking wealth advisory firms in Houston, TX.

Sound Financial Planning Services

As we have mentioned, Oak Harvest Financial offers financial planning services to individuals, businesses, and investors. This Houston wealth management firm believes in an atmosphere of education and offers predictability, reliability, and, above all, financial security.

These are a few of the financial planning services you can benefit from with Oak Harvest:

- **Estate Planning:** Although estate planning is a somewhat unpleasant area of financial planning, it is nonetheless an essential task and must be given due consideration. Services are structured around capturing capital and retaining control. Taking care of your estate while you are

still living is an enormous gesture on your part and alleviates your loved ones from this additional burden during what will be a difficult time.

- **Retirement Planning:** Oak Harvest believes that income planning is the most essential piece of the retirement planning puzzle. Currently, your lifestyle is secure because a paycheck guarantees money every month.

Naturally, when you are no longer working, you will need to replace that income, and this is where a retirement plan can ease your mind.

Successful retirement is all about intelligently distributing what you've saved over the years and making sure that your nest egg is enough to sustain a long retirement.

- **Life Insurance:** Oak Harvest Financial Group is one of the top life insurance advisors in the city of Houston. As your life insurance broker, it seeks to help you choose the best plan of action in order to fully utilize your living benefits.
- **401(k) Services:** Not many people realize the flexibility of a 401(k) and what it can do for them. Especially if you've changed jobs over the years, you will need a professional experienced in 401(k)s to guide you on your path.

Oak Harvest Seminars

Oak Harvest offers [informative seminars](#) for clients who want to learn more about how they can make the most of their money. This wealth management firm in Houston provides presentations and workshops on investing, retirement, and more.

This Houston wealth management firm is committed to providing up-to-date information that will help clients make the best financial decisions for their future well-being. This firm gets extra points for how frequently they hold these seminars; there are several seminars and workshops a month.

An Informative Blog

As you navigate the ins and outs of Oak Harvest Financial Group, don't forget to take a look at its [blog](#). Here, the Houston financial advisor answers direct questions from clients, offers market insight, and talks about various topics of

interest with enthusiasm. The blog is updated regularly and can serve as an important and casual tool as you seek to gather information to support your financial decisions.

Portfolio Advisory Council, LLC Review

When doing business with [Portfolio Advisory Council, LLC](#), you are dealing with a Registered Investment Advisor (RIA) who is driven by a mission to provide honest investment advice to all of its clients. Founded in 1986, it has been forming long-term relationships for decades, and its client loyalty is clearly evident in what it does.

The services that Portfolio Advisory Council specializes in include investment management, IRA rollover, and employer retirement plans. However, it is here to serve you in any way that it can, so if you don't see what you need, call and ask; it says that it'll be glad to accommodate most specific needs.

Key Factors that Enabled This Firm to Rank as a Top 2017 Wealth Advisory Company

Below are some key factors that we like about this advisor that allowed it to be ranked as one of this year's top portfolio and investment advisory firms in Houston, TX.

An Independent Advisor:

As an independent entity and a Registered Investment Advisor, Portfolio Advisory Council has the freedom to make recommendations based on your best interest instead of the best interest of affiliate companies that sell commission-based products.

A Solid Investment Approach:

Investment options with Portfolio Advisory Council include a broad spectrum of options such as stocks, bonds, mutual funds, and cash. Your investment portfolio is monitored daily and adjusted as necessary. Let's take a look at some of the benefits of having an investment portfolio through Portfolio Advisory Council:

- custom investment plans
- family trusts
- effective tax management

- tax preferred investments
- balanced investment approach
- tactical management
- income
- peace of mind

You can read more detailed information in regard to investment management and your investment portfolio [here](#).

IRA Rollover Specialists:

In life, there will certainly be times when you need to make adjustments to your financial plan. You may change jobs, get a divorce or open or close a business. During these times of transition, Portfolio Advisory Council will be ready to assist you. Whether you are dealing with a 401(k) plan, a pension plan or a 403(b) profit sharing plan, your advisory team knows how to deal with all of them and will help you make necessary changes as well as taking into account reducing your tax liabilities along the way.

Want to know more about a plan you may have left behind or just learn about all the facts of IRA rollovers? Take a look [right here](#).

The Employer Plan:

Running a business comes with a monumental amount of responsibility. Providing your employees with the right retirement plan is one thing that Portfolio Advisory can take off your list. The perfect retirement system will add value to both the employer and employee. Here is a sample overview of retirement plans offered:

- 401(k) and profit sharing plans (standard, solo, safe harbor, etc.)
- defined benefit (DB) plans
- simple IRA
- Simplified Employee Pension (SEP) plan
- 403(b) plans
- 457 plans

An Experienced Team:

If decades of experience and solid accreditation are on your checklist, then you'll feel right at home with the team at Portfolio Advisory Council. Its boutique-sized staff of about 8 professionals brings a mixture of unique perspectives and quality market experience to the team. To name just a few of

the professionals' well-earned designations, you'll find several Certified Financial Planners (CFP), Chartered Life Underwriters (CLU), and Accredited Investment Fiduciaries (AIF).

[Read More: Best Financial Advisors in San Antonio and New Braunfels, TX | Ranking | San Antonio and New Braunfels Wealth Managers](#)

Strategic Financial Advisors Review

When [Strategic Financial Advisors](#) first stepped onto the scene, it had one simple goal in mind: to help investors reach a destination of financial wellness. Whether that be through investment planning, financial management or insurance, it offers services throughout the Houston, Texas, area.

Strategic Financial Advisors is a fee-based wealth management firm in Houston, but we have included them on our list for the range of services that they provide.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Houston

Below are key factors that enabled this advisor to rank as one of this year's top financial advisory firms in Houston, TX.

Comprehensive Financial Planning

The Houston financial advisors at Strategic Financial Advisors offer a variety of services that help their clients go about their day-to-day lives without worrying too much about their financial picture. They help clients become good stewards of their wealth.

A [few of the services](#) available through this Houston wealth management firm are:

- Portfolio analysis

- Asset allocation design
- Investment management
- Retirement planning
- Insurance planning
- Social security analysis
- Educational seminars

Client Centered Wealth Management

Proper wealth management is your way to live your life without worrying that you'll have enough money for the future to comfortably retire or put your children through college. This Houston financial advisory firm uses industry knowledge, specialized tools, and global resources to provide [client-centered wealth management](#).

Some of the services they offer include:

- Asset allocation
- Portfolio design
- Investment management selection
- Portfolio construction
- Tax management
- Risk management
- Safety and security of assets

Valuable Resources

Through prudent financial education and a host of financial tools and resources, you can become better equipped to navigate through challenges and remain stable in an unstable economy. Take advantage of articles of interest, financial calculators, presentations, and videos through Strategic Financial's [resource center](#).

Courtesy Economic Outlook

Published quarterly, Strategic Financial offers a courtesy [economic outlook and market commentary](#). Information contained within offers research findings, market impacts, index data, and more.

The Financial Advisory Group Review

[The Financial Advisory Group](#) wants to be your trusted source for wealth management. It offers a variety of wealth management and financial planning services that begin with the breadth of knowledge possessed by its [dedicated team](#). Located in the heart of Houston, Texas, it offers wealth management, financial planning, and investment services to a variety of clients.

The Financial Advisory Group is a [fee-only](#) wealth management firm in Houston.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Houston

Below are key factors that enabled this advisor to rank as one of this year's top financial advisory firms in Houston, TX.

A Fee-Only Approach

The Financial Advisory Group believes in taking an independent approach to what it does. As a [fee-only](#) Registered Investment Advisor, it chooses to stand independently and does not offer products or advice based on the commission received for doing so.

Overall Wealth Management

Protecting and managing your wealth is one of the cornerstones of financial success. The Financial Advisory Group delivers individualized wealth management strategies that seek out areas of opportunity, make efficient changes, and chart new directions.

This Houston wealth management firm will consider the [following factors](#) when creating a plan for managing your overall wealth:

- Investments
- Financial instruments
- Estates
- Income tax regulations
- Risk management
- Insurance

- IRAs
- Retirement plans

Financial Planning Advantage

The importance of well-integrated and well-timed financial planning and tax services cannot be underestimated. With a step-by-step plan to maximize your financial potential, this Houston wealth management firm covers a wide [variety of services](#):

- Retirement saving
- College funding
- Budgeting
- Cash flow
- Taxes
- Will and estate planning
- Income
- Expenses
- Investments
- Assessment of risk
- Qualified pension plans
- IRAs
- Various types of insurance

Tax Services:

- Tax compliance
- Personal tax planning
- Business tax planning
- Tax consulting

Quarterly Investment News

As a valuable resource, you can view the Financial Advisory's current [Investment Newsletter](#), as well as previous quarterly newsletters. Each edition covers the Financial Advisory Group's current investment and economic outlook, investment strategies, and more.

[Related: Best Financial Advisors in Pittsburgh, PA | Ranking | Pittsburgh Wealth Management Firms](#)

Willis Johnson & Associates Review

[Willis Johnson & Associates](#) thinks of themselves as a trusted companion on a client's financial journey. This Houston wealth management firm specializes in assisting corporate professionals with their financial planning needs. They are particularly experienced in the complex circumstances of transition from corporate life to retirement.

Willis Johnson & Associates does not explicitly call itself a “fee-only” wealth management firm in Houston. They explain that they charge a fee based on the assets under management, and state that they [do not get paid for any commissions or transaction fees](#).

We have included them on our list for the services they provide and their speciality in assisting corporate clients.

Key Factors that Enabled This Firm to Rank as a Top Wealth Management Firm in Houston

Below are key factors that enabled this advisor to rank as one of this year's top financial advisory firms in Houston, TX.

Continuous Planning Process

The Houston financial planners at Willis Johnson & Associates start by understanding where a client is in their life and their finances. Whether they are coming to the firm in their forties, fifties, sixties, or beyond, the firm's advisors can help clients determine what they want (and need!) from their finances.

This financial planning process involves clear steps meant to guide both the advisors and the client. After conducting a thorough analysis, these Houston financial advisors draft a financial plan based on a client's discussed goals.

Willis Johnson & Associates's planning process consists of the [following steps](#):

1. **Understanding You:** Discussion of goals and gathering of personal, financial, and legal information.
2. **Financial Analysis & Education:** Conversation about your existing resources and how to maximize them.

3. **Guidance & Implementation:** Presentation of plan ideas.
4. **Financial Review:** Monitoring of the plan and adjustments as needed.

Investment Planning

Willis Johnson & Associates offers comprehensive investment planning services. They help clients figure out the [following](#):

- Figuring out goals and objectives based on risk tolerance
- Tax-efficient asset allocation
- Active 401(k) management
- Account consolidation
- Managing company stock
- Net unrealized appreciation
- Tax loss harvesting

Estate and Charitable Planning

It's not a fun thought, but planning your legacy is an important way to assert some control over how your assets will be handled and provide some comfort for your family by sorting out the details in advance. This wealth management firm in Houston can help with the [following aspects](#) of your estate planning:

- Wills and ancillary documents
- Guardians for children
- Dependent care
- Protecting heirs from divorce and creditors
- Appreciated stock to charity
- Employer charitable gift matching

Conclusion—Top 10 Financial Advisory Firms in Houston, Texas

Now that you've had the opportunity to dive deep into the essence of the top financial advisors and wealth management firms in Houston, Texas, you will hopefully have a better grasp of what services you need and what services are available through a financial advisor in Houston.

The best way to move forward from here is to take what you've learned and create a short but encompassing list of what types of financial services are most important to you.

Are you looking for basic asset management? Perhaps, you need help with financial planning for your business. Maybe you have been neglecting your retirement, and it's time to take a look.

Whatever the case may be, knowing what you are looking for will help you when narrowing down your options to a select few financial advisors in Houston.

Once you have written down your needs, you can match those needs to the services offered by the top financial advisors in Houston. You may end up with more than one advisor that piques your interest, so don't hesitate to contact the firm with any further questions you may have.

Better yet, if your potential Houston financial advisor offers a complementary consultation, this can be a great opportunity to get the conversation started.

Whichever route you choose, we hope that what you've read here today serves you well along your journey to a bright and secure financial future!

Image sources:

- <https://www.bigstockphoto.com/image-76091234/stock-photo-houston-downtown-sunset-modern-skyscrapers-at-texas-us-usa>
- <http://avalonadvisors.com/individuals.html>
- <http://www.houstonassetmgmt.com/mission-statement>

AdvisoryHQ Disclaimer:

Reasonable efforts have been made to present accurate information, however all info is presented without warranty. Review AdvisoryHQ's [Terms](#) for details. Also review each firm's site for the most updated data, rates and info.

Note: Firms and products, including the one(s) reviewed above, may be our affiliates. Click to view our [advertiser disclosures](#).