

# **Top 11 Best Financial Advisors in Pittsburgh, Pennsylvania (2016 Ranking)**

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## **2016 RANKING OF TOP WEALTH ADVISORS**

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### **Finding the Top Financial Advisor in Pittsburgh, Pennsylvania**

If you are taking on the difficult task of finding the best financial advisor or wealth manager in Pittsburgh, Pennsylvania, you have no doubt created a life that affords you such financial decisions. You need to find a financial advisor in Pennsylvania who will help you safeguard your hard earned money and grow what you already have over the long term.

When you begin looking for a financial advisor in and around Pittsburgh, you will find hundreds upon hundreds of options, and to even begin the selection process is endlessly time consuming.

To answer the many questions that Pittsburgh residents may have regarding the best financial advisors in Pittsburgh and other areas in Pennsylvania, the AdvisoryHQ research and review team has conducted a detailed analysis of advisors and wealth management firms across Pennsylvania, and we have published our findings below.



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## About AdvisoryHQ

AdvisoryHQ News was launched in 2015 and has since become one of the fastest-growing ranking news media for the financial and wealth management industry. We are committed to simplifying the research that consumers perform when searching for a wealth manager or investment management firm.

Our reports are **published for free**, and we do not accept any fees for the financial advisor and investment manager reviews and rankings that we publish. This is to ensure the highest level of objectivity and unbiased editorial reviews.

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## AdvisoryHQ's List of the Best Financial Advisors in and around Pittsburgh

- **Allegheny Financial Group**
- **Bill Few Associates, Inc.**
- **BPU Investment Management, Inc.**
- **CooksonPeirce Wealth Management**
- **D.B. Root & Company**

- **Fort Pitt Capital Group**
- **Fragasso Financial Advisors**
- **Grant Street Asset Management**
- **Hefren-Tillotson**
- **Legend Financial Advisors**
- **McMahon Financial Advisors, LLC**

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

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## **Top 11 Best Financial Advisors in Pittsburgh, Pennsylvania**

<b>Firm</b>	<b>Location</b>
Allegheny Financial Group	Pittsburgh
Bill Few Associates, Inc.	Pittsburgh
BPU Investment Management	Pittsburgh
CooksonPeirce	Pittsburgh
D.B. Root & Company	Pittsburgh
Fort Pitt Capital Group	Pittsburgh
Fragasso Financial Advisors	Pittsburgh
Grant Street Asset Management	Canonsburg
Hefren-Tillotson	Pittsburgh
Legend Financial Advisors	Pittsburgh
McMahon Financial Advisors	Pittsburgh

What methodology did we use in selecting this list of the best financial advisors in and around Pittsburgh and top wealth managers in Pennsylvania?

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

We then applied AdvisoryHQ's **Breakthrough Selection Methodology** to identify the final list of top advisors that provide services to communities throughout Pennsylvania.



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## Detailed Review – Top Ranking Financial Advisors in Pennsylvania

The following is an organized compilation of each firm that ranked in the top 11 on our list of top advisors and financial planners in and around Pittsburgh. Each review details what we consider to be key factors that allowed these Pennsylvania financial advisory firms to rank high in our selection scoring.

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## Allegheny Financial Group Review

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Allegheny Financial Group is a fee-based, SEC-registered financial advisor headquartered in Pittsburgh, Pennsylvania. They offer financial planning, portfolio and risk management, market analysis, and business and estate planning to households, businesses, and non-profits.

Two years after establishment, Allegheny Investments was established as an in-house broker/dealer division to broaden access to services for clients. A formal investment research group has also been added, which further broadens the scope of services to include more Financial Plan Analysts (FPA's).

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

Listed below are key factors that allowed Allegheny Financial Group to rank as one of 2016's top 11 financial advisory firms in and around Pittsburgh, Pennsylvania.

Complete Financial Planning:

- + Risk Management**

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- + Retirement Planning**

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- + Tax Planning**

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- + Estate Planning**

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- + Education Planning**

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- + Business Planning & Acquisitions**

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Why would you need a financial plan? Because you have ever-changing needs and goals, and one way of doing business simply won't work. A comprehensive financial plan puts you in control of your future and allows you to maximize your asset retention.

A financial plan through Allegheny Financial adheres to the following objectives:

- **Evaluate:** Assessing your needs is always the first step. Your team of advisors will explore with you the path to achieving your financial goals through education, risk management, and retirement and estate planning.
- **Self Objectify:** The next step is to set clear and measurable financial goals.
- **Develop Your Plan:** The goals you set must now come attached with a plan of action. How will you reach your financial objectives?
- **Put Your Plan Into Action:** By now, a clear and concise plan has been established and your financial advisor will put this plan into action.
- **Monitor Your Plan's Progress:** Regular monitoring and evaluation will improve the success of your financial plan. Investments should adapt to market change and any changes in your own life.

### Managing Your Investments:

Whether you are looking to grow your assets or minimize taxes, properly managed investments are the cornerstone of financial health. Allegheny Financial focuses on four main investment components:

- **Asset Allocation:** Determining the right proportions for each category of assets is the first step in investment management. Creating a balance between risk and return is the method of choice.

- **Portfolio Implementation:** Your chosen asset classes are implemented into your portfolio, and careful monitoring ensures you are staying on track with your goals.
- **Original and Proprietary Investment Research:** Not satisfied with commercial market reports, Allegheny Financial conducts their own original research that they share with their clients through easy-to-read reports and quarterly Capital Market Reviews.
- **Asset Management:** Allegheny Financial's Asset Management Program offers the highest level of service and planning to manage the performance of your investments. They utilize organized, effective, and expertly created diligence to take over the critical management of your portfolio.

### Purely Independent:

Allegheny Financial has always thrived on the premise of being an independent, fee-based financial advisor. They stand objectively, and their advice is not tied to any products or services. For over 38 years, this has been part of their culture.

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## **Bill Few Associates, Inc. Review**

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With two Pittsburgh locations, [Bill Few Associates, Inc.](#) extends financial planning and investment expertise to a variety of individual and institutional clients. Whether you are just beginning to build your wealth or are heading into retirement, Bill Few's broad range of services will be custom tailored to meet all of your financial planning needs.

As an independent, fee-based advisor, you can expect them to offer honest, objective counsel and advice. Your interests are and will always be their top priority.

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

Below are key factors that enabled Bill Few Associates to be rated as one of 2016's top 11 financial advisory firms in and around Pittsburgh.

## Professional Investment Management:

Most of the services offered by Bill Few Associates are centered around their investment expertise. Clients benefit from the in-depth knowledge of multiple investment management professionals with a great record of success. The following is an overview of investment services:

- **Individual Equity Management:** Revolving around a core philosophy of style-neutral, sector-neutral, large capitalization equity portfolios, Bill Few Associates regularly outperform benchmarks. Custom equity portfolios are available to target specific goals.
- **Individual Fixed-Income Management:** A diversified portfolio of fixed-income investments is available for both individual and institutional clients. In combination with winning tax strategies, Bill Few's emphasis on high credit-quality corporate bonds is proven to perform.
- **Mutual Fund Management:** Bill Few Associates have a quality history of utilizing proprietary and commercial research systems in order to select mutual funds that serve clients extremely well.
- **Alternative Investment Management:** Traditional investments can be supplemented through access to hedge funds, Limited Partnerships, and other options strategies.

## Retirement and Estate Planning:

You can learn to do more with your money and, in turn, enjoy more of your golden years. By designing an effective strategy you will see the results you want both now and in the future. Bill Few Associates can help you plan for retirement and safeguard your estate for future generations.

## Insurance Planning:

A comprehensive financial plan takes into account both life and long-term care insurance. Your financial advisor can show you how to integrate both types of insurance into your retirement and estate plans.

## Company Retirement Planning:

To help small and medium-sized businesses develop effective retirement plans, Bill Few Associates offer options such as PSP, 401(k), SEP, SIMPLE Plans, and more. In addition, each plan comes with expert advice and encompasses the following components:

- High-Performance Company Retirement Planning

- Regular Reviews and Updates
- Advisement to Comply with the Employee Retirement Income Security Act of 1974 (ERISA)
- Simple and Easy-to-Understand Plans

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## **BPU Investment Management, Inc. Review**

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BPU Investment Management, Inc. is one of Western Pennsylvania's premier financial advisory and investment management firms. While they are headquartered in Pittsburgh, they also have offices in Greensburg and Uniontown.

Services are extended to private individuals, corporate leaders, business owners, and eleemosynaries. Clients can enjoy a wide-range of wealth management services including asset management, financial planning, retirement planning, and institutional brokerage services.

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

The following is a listing of key factors that allowed BPU Investment Management to rank as one of 2016's top 11 financial advisory firms in the greater Pittsburgh area.

#### A Balanced Approach:

Underneath all the business practices that take place every day at BPU Investment Management, they most proudly enjoy the long-lasting relationships they build with their clients. It's this mix of professional and personal attitudes that demonstrates exactly what sets the team at BPU Investments apart.

#### Wealth Management for Private Clients:

Your financial advisor will be the one who understands your goals and current life situation. He or she will act as a liaison between you and BPU's accredited team of professionals, which include Chartered Financial Analysts (CFAs),

Accredited Investment Fiduciary Analysts (AIFAs), and Certified Financial Planners (CFPs).



As a private client, you have access to recommendation for services such as:

- Cash management
- Investments
- Tax planning
- Debt structure
- Retirements plans
- Legacy planning
- Asset protection

#### Total Asset Management:

Whether you are a private client, a trust, or an eleemosynary, BPU has total asset management services to fit your needs. One of the greatest challenges of asset management is managing the risk aspects that can emanate from global economies. Combining institutional-strength investment capabilities with personal oversight allows BPU to deliver high-quality and objective advice.

#### Education for Corporations and Organizations:

BPU Investments offers financial education to employees and members of associations that boosts understanding of financial resources. In turn, this aids in the development of sound financial goals. Classes are taught by experienced and credentialed BPU employees who will never solicit employees after class.

#### Inclusive Brokerage Services:

Through BPU's full-service brokerage options, clients have access to a wide spectrum of traditional brokerage products including:

- Insurance and Annuities
- IRAs
- Domestic and International Equities
- Fee-Based Advisory Accounts
- Corporate, Government, and Municipal Bonds
- Structured Products and Derivatives

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## CooksonPeirce Wealth Management Review

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“Today’s financial landscape is rugged. Get a good guide.” That's the mantra at [CooksonPeirce Wealth Management](#). With over 200 years of combined professional experience, the team at CooksonPeirce is ready to be that guide with sound wealth and investment management services.

Since they first started helping clients in 1984, CooksonPeirce has been creating wealth management plans based on their favorite thing: numbers. Their process is steeped in transparency, unbiased advice, and fiduciary commitment. Their office is located right in Pittsburgh, Pennsylvania.

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

Below are key factors that enabled CooksonPeirce Wealth Management to rank as one of 2016's top 11 financial advisory firms in Pennsylvania.

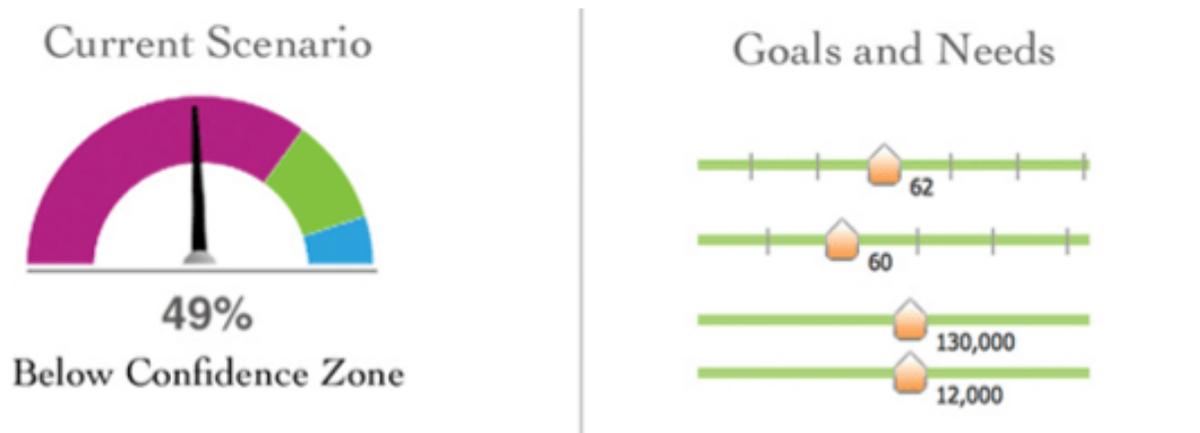
#### Never Lose Sleep:

Being the numbers people that they are, CooksonPeirce provides a continuous feed of live data that you can see 24 hours a day. You don't have to lose sleep wondering what your investments are doing; within a couple of clicks, all your most important information is at your fingertips.

#### A Unique Wealth Management Approach:

While most financial advisors would start at the beginning and walk through to the intended end-results, CooksonPeirce does things quite the opposite way. They begin at the end. Once you know where you want to end up, getting there should be simple, right?

There is no paper plan that gets snapped into a binder and left on a shelf to collect dust. No, your wealth is an active and ever-changing avenue and should be constantly attended as such, instilling confidence in your plan and your financial future.



### The Investor's Philosophy:

A proprietary methodology created by CooksonPeirce is the foundation of their investing methodology. Stocks are selected where “winners” proved to be highly productive, more so than conventional means.

The firm is an all-cap equity management firm, focusing on stock selection through quantitative analysis. Always based on mathematical principles, CooksonPeirce invest their personal assets alongside those of their clients.

### Dynamic Alpha:

For the purpose of providing exceptionally diversified mutual fund options to their clients, a system called Dynamic Alpha gives clients access to endless information and insights regarding their mutual fund options. Powered through Catalyst Funds Intelligent Alternatives, this is an incredible tool for anyone looking to create an investment portfolio.

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# D.B. Root & Company Review

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D.B. Root & Company is centered right in Pittsburgh, Pennsylvania, and brings together best-of-class service and tools to help clients achieve their own life and financial goals.

They are a fully independent wealth management and financial planning firm with many niched services to offer both individual clients and businesses.

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

Below you will find some of the key factors that enabled D.B. Root & Company to rank as one of 2016's top 11 financial advisory firms in Pittsburgh.

### Core Values at Work:

As an independent fiduciary, D.B. Root & Company operates through a set of core values that drive them in everything they do. The core values at the center of their business are:

- Transparency
- Accountability
- Objectivity
- Trust

### Life Plan 20/20:

In order to encompass a range of services not traditionally offered elsewhere, the Life Plan 20/20 was created. The team at D.B. Root & Company has taken portfolio management, tax and insurance advice, and estate and retirement planning, among other essential financial services, and combined them into one total package that is designed to keep your life goals on track.

The follow is an overview of this customizable system and the specific areas of importance:



### Strategic Partnerships:

A good financial advisor knows that no one has all the answers. D.B. Root knows this and has partnered with Envestnet and Charles Schwab to act as supplemental sources of information whenever you may need it.

### Hedgeye Risk Management:

To gain the ultimate perspective on managing risk in today's crazy and always shifting economy, D.B. Root employs the cutting edge research of Hedgeye Risk Management. This company covers all areas of the market with a scrupulous eye.

### The Family Office for the Millionaire:

Middle class investors can retire comfortably with this unique retirement planning and investment management system. Your D.B. Root advisor will secure your assets through effective risk management, as well as pursuing the growth of your current portfolio. All of your taxes, wills, insurance, and trusts will align to your wealth building and preservation goals.

## Fort Pitt Capital Group Review

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Fort Pitt Capital Group is an independent financial advisor in Pittsburgh that provides fee-only investment and wealth management services to its clients out of offices in Pittsburgh, PA, and Naples, FL.

While the firm was founded in 1995, the founding partners bring with them the collective synergies that come from working together as colleagues since 1991.

Unique among their peers is the fact that Fort Pitt Capital Group operates the two primary aspects of their business—wealth management and investment management—separately. As unbiased investment advisors and wealth managers in Pittsburgh, this ensures that professionals from both service areas dedicate themselves exclusively on specific client needs in each of those two business segments.

The company serves individuals as well as institutional clients that include public entities, labor unions, foundations, endowments, and not-for-profit organizations. As a top ranked wealth manager in Pittsburgh, the company offers institutional and business clients a range of services that includes:

- Consulting for 401(k) plans
- Pension plans management
- Consulting and advisory services for not-for-profit entities, endowments and foundations

Institutional investors may choose from two unique strategies that the company offers: an asset allocation strategy and an equity-only based portfolio strategy known as the Total Return Strategy.

Individual clients also benefit from a wide range of services that the company offers, including:

- Portfolio management
- Education planning
- Cash management

- Retirement income
- Wealth transfers
- Personal and business lending
- Trust and estate plans\*
- Business successions
- Charitable giving
- 401(k) rollovers
- Roth and traditional IRAs
- Insurance reviews

Clients of the company are supported by a large team of qualified professionals that includes Financial Consultants, a Retirement Planning specialist, and a team of Portfolio Management and Operations support personnel.

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

Below you will find some of the key factors that enabled Fort Pitt Capital Group to rank as one of 2016's top 11 financial advisory firms in Pittsburgh.

#### Independent Advisory:

As an independent investment and wealth manager in Pittsburgh, the company is not associated with, nor sells any products for, brokers, insurance companies, banks, or corporate money management firms. Advice delivered to clients is therefore completely independent and unbiased.

#### Fee-only Advisors:

The company is a fee-only wealth management firm in Pittsburgh, which means that the only compensation they receive is directly from providing services to clients. As advisors do not receive any forms of sales commissions or other fees, clients receive conflict of interest-free advice at all times.

#### Deep Experience and Synergies:

Collectively, the firm brings decades of investment and wealth management experience to the table. The founding partners also bring with them unique synergies from having worked together for nearly 25 years.

#### Value-conscious Investment Approach:

Fort Pitt Capital Group is a Pittsburgh wealth manager and investment management firm that follows a value-conscious investment philosophy. Using this approach, the company's focal point is to preserve and enhance client capital, while also generating income from their portfolios.

Following Their Own Advice:

The company is unique among many Pittsburgh wealth management firms in that the firm's principals and staff have made sizable personal investments using the very same strategies that they advocate for clients. This underscores the company's commitment to always be aligned with the interests of its clients.

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## Fragasso Financial Advisors Review

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The team at [Fragasso Financial Advisors](#) has been representing clients for more than 40 years through comprehensive financial planning, wealth management, portfolio management, and retirement planning services.

Located in the heart of downtown Pittsburgh, they serve clients ranging from affluent individuals to retirement plan sponsors to non-profit institutions.

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

Below are key factors that enabled Fragasso Financial Advisors to rank as a top 2016 wealth management firm in and around Pittsburgh, Pennsylvania.

The Independent Standard:

Through a holistic approach, Fragasso Financial Advisors provide independent, unbiased, fee-based investment and financial planning advice that is always given with the best interest of their clients in mind.

Wealth Management:

After 40 years, Fragasso Advisors like to think they've dealt with just about every kind of scenario there is. Nonetheless, ever-changing political and economic environments urge the team to approach each client's circumstances with a fresh approach couched in time-tested principles. Successful families receive the benefit of a variety of services, including:

- Income Tax Reduction Strategies
- Business Succession Planning
- Retirement Capital Sufficiency
- Education Funding
- Charitable and Family Gifting Strategies
- Cash Flow Scrutiny
- Long-Term Care Cost Analysis
- Stock Option Management
- Coordination of Planning with Attorney and Accountant
- Life Insurance
- Estate Planning

#### In-House Portfolio Management:

Once your portfolio has been cultivated to perfection, Fragasso's Portfolio Management Department steps in with a team of seasoned professionals whose sole job is to manage your portfolio. Instead of having just one set of eyes on their investments, clients receive the benefit of an eight-person team that looks at things from every single angle.

#### Retirement Plan Advisors:

When it comes to employer-sponsored retirement plans, Fragasso's Retirement Plan Advisors act with fiduciary interest to make a complex area of management simple and easy to understand. With their five key components, the process seems much smoother and business-friendly:

- **Plan Design Consulting:** Similar to any initial financial consultation, this stage covers plan design and implementation that addresses both qualified and non-qualified programs.
- **Plan Expense Analysis:** Based on the service levels provided, plans are periodically reviewed to ensure reasonable fees and compensation.
- **Investment Selection and Review:** Flexibility is important, and minimizing risk while maximizing return offers increased flexibility to choose and monitor investments.

- **Participant Education:** Establishing opportunities for plan participants to be educated about their options based upon their needs is an important key to success.
- **Fiduciary Review:** Reviewing the organization's effectiveness in meeting its fiduciary responsibility evaluates risk and establishes procedural framework for future considerations.

### Free Phone Consultation:

As you weigh the services offered by Fragasso Financial, you can take advantage of a non-obligatory, high-level conversation about your current financial situation and what your goals are for the future. Simply fill out the form on their website and an accredited financial advisor will get in touch with you.

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## **Grant Street Asset Management Review**

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A business with over four decades of proven experience doesn't get that way without offering strategies that work. [Grant Street Asset Management](#) has been doing just that for a very long time. They are located in Canonsburg, Pennsylvania, just outside of Pittsburgh.

Grant Street Asset actively manages portfolios for families, individuals, businesses, physicians' groups, and non-profit institutions and foundations. They deliver strategic guidance that goes beyond investment management and seeks to build and maintain client relationships.

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

Below are key factors that enabled Grant Street Asset Management to be rated as one of 2016's top 11 financial advisory firms in and around Pittsburgh, Pennsylvania.

### To Stand Independent:

As an award-winning, fee-only investment management firm, Grant Street Asset is a Registered Investment Advisor (RIA) and upholds their fiduciary

responsibility to their clients. They do not accept any commissions or receive revenue from selected investments.

### Managing Your Wealth:

In managing wealth, inherently there is always a “bigger picture.” As a client, you receive the benefit of individualized investment strategies that conform to your unique situation. Coordinating with your other financial professionals allows for a holistic approach to investing and managing wealth.

### Foundations and Non-Profits:

Boards tend to face significant challenges when mitigating their financial plans. With a legal fiduciary responsibility, boards and committees turn to Grant Street Asset for trusted guidance through confusing policy statements, tax issues, risk management, and more.

### Services for Small Businesses and Physicians:

Even the most successful business owners often wonder if they are doing what they should in respect to building and protecting wealth. So many variables come into play with each unique situation; it really can be daunting. Grant Street Asset understands this complex need and has decades of experience to put to work for you.

### Supporting Partners:

Grant Street Asset partners with many professionals to make up a client’s trusted financial team. A firm doesn’t necessarily have to be a one-stop-shop, and in fact, the broader the access to expert information, the better prepared one can be for any variables that arise in a plan.

Here's how we partner with accountants:

- Tax-Conscious Investment Management
- Annual Gain/Loss Forecasting
- Data Aggregation of All Assets
- Tax Data & Document Resource

Here's how we partner with attorneys:

- Assist in Project Management
- Proactively Identify Potential Client Needs
- Step-Up Cost Basis and Transfer of Assets

- [Refer Clients to Specialty Practices for Legal Needs](#)

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## Hefren-Tillotson Review

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As a company that claims to provide “meticulous wealth management since 1948,” [Hefren-Tillotson](#) has certainly laid down a legacy. With over \$9 billion in client assets, they serve individual clients, businesses, and institutions and non-profits.

While their primary headquarters are in two Pittsburgh locations, they also have offices in Butler, Greensburg, Canonsburg, and Wexford, Pennsylvania. They are one of the oldest and largest wealth management firms in Western Pennsylvania.

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

Below are key factors that enabled Hefren-Tillotson to be rated one of this year’s top 11 financial advisory firms in the greater Pittsburgh area.

#### Services for Individual Investors:

Hefren-Tillotson believes that a truly rewarding life comes through YOUR vision and personal values. Therefore, they strive to get to know you and your goals so they can best understand how to handle your specific situation.

They offer initial and ongoing advice on investments and retirement income, as well as comprehensive financial planning through their MASTERPLAN approach (discussed further on). Along with consistent communication, the following are services an individual investor can take advantage of:

- Retirement Planning
- Saving for Education
- Insurance
- Charitable Giving
- Closely-Held Business Planning
- Investing an Inheritance

- Long-Term Care
- Estate Planning
- Divorce Planning
- Oil and Gas Royalties

### Business Services:

Hefren-Tillotson offers business retirement plan management to businesses in order to help them attract and retain talented employees through competitive benefits. High-performing retirement plans, along with regular reviews and updates, drive optimal performance and maximum participation.

Hefren-Tillotson has established a “401(k) team” along with the Hefren-Tillotson Corporate Services Model Portfolio Program to guide employees through this crucial process.

### Financial Strategies for Institutions:

Whether the matter at hand is engagement in a foundation or endowment planning, managing assets responsibly is an important element to minimizing risk and maximizing success for all institutions and non-profits. The following two concepts are just a sampling of the comprehensive planning offered by Hefren-Tillotson:

- **Money Management:** After the initial long-term investment policy is in place, Hefren-Tillotson works with you to manage your portfolio. They take into account risk tolerances, cash inflows and outflows, expected returns, permitted investment classes, legal issues, asset allocation restrictions, and more.
- **Donor Development:** When the focus turns to non-profit organizations, securing and maintaining valuable donors is an important part of your financial well-being. Hefren-Tillotson proudly offers ongoing seminars and educational opportunities for donors to help them feel secure in their contributions.

### The MASTERPLAN Approach:

In order to cover every aspect of your financial planning needs, Hefren-Tillotson has developed a MASTERPLAN Approach that includes five steps which flow easily from one to another. Let’s take a brief look at their path to success:

- **Meet Face-to-Face:** Learning about your values, goals, and financial situations is the building block to long-term success. Along with a personal conversation, your financial advisor will gather necessary documents as they prepare to formulate a plan for you.
- **Determine Your Goals, Priorities, and Risk Tolerances:** This step in the planning process allows your financial advisor to better understand what plan will best support both your long and short-term goals.
- **Develop Your Own Personal Financial Plan – In Writing:** Each plan developed is as unique as your fingerprint. A written plan will be presented to you to clearly outline all goals and objectives, along with the plan of action that will help you meet those goals.
- **Implement Strategies, then Adjust Regularly as Situations Arise:** Your meticulously crafted plan is now put into action and carefully monitored and reviewed to ensure that it is working hard to get you to where you want to be.

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## Legend Financial Advisors Review

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As an SEC-registered financial planning and investment management firm, [Legend Financial Advisors](#) is a company rooted in a fee-only, non-commissioned approach. They hold no interest in underhanded practices that fill your portfolio with useless investments that only benefit your advisor.

They are located in Pittsburgh and serve affluent and wealthy individuals, as well as business entities and non-profit organizations.

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

The following is a list of key factors that enabled Legend Financial Advisors to rank as one of 2016's top 11 financial advisory firms in Pittsburgh, Pennsylvania.

#### Fee Standards:

Clients of Legend Financial have a few different fee options that include hourly rates, fixed-fee investments, fee-only services, as well as group arrangements for companies.

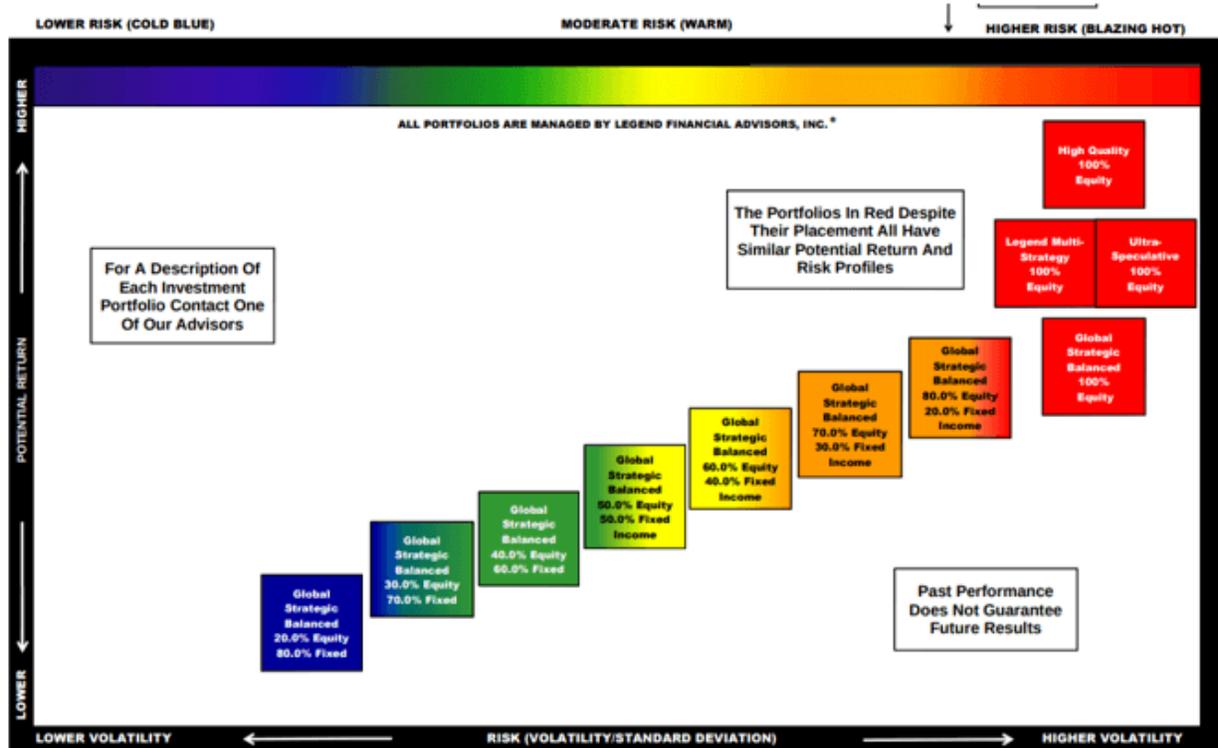
For clients who solely utilize Legend Financial’s Investment Management services, fees are dependent upon a percentage of assets under management.

### Client Variety:

In addition to serving individuals, families, and businesses, Legend Financial also specializes in serving medical doctors and tech professionals. They’ve curated strategies to best serve a variety of client needs.

### Investment Management Process:

Investment portfolios are customized to individuals and institutions and are developed to match each client’s risk and return requirements.



Investment research is a big part of creating a balanced portfolio, and strategies are created around an emphasis on portfolios that have historically achieved higher than expected returns. Through a variety of sources and extensive client education, Legend Financial assists clients in managing successful, long-term portfolios that offer growth and flexibility.

### Investment Services for Advisors:

Legend Financial offers customized Investment Management Services to financial advisors. The premise is a la carte and is designed to be an inexpensive resource to financial advisors with a variety of practice management issues. Let's take a look at some of the criteria associated with investment portfolios for financial advisors:

- **Portfolio Minimums:** Mutual fund portfolios hold a \$200,000 minimum, while portfolios constructed with stocks hold a minimum of \$250,000. Furthermore, Limited Partnerships must be accredited and will require a \$1 million minimum.
- **Risk Spectrum:** For all investment portfolios, the risk spectrum chart above still applies.
- **Fees:** Average fees range from 45 to 50 basis points, depending upon the strategy. However, all numbers fluctuate depending upon the amount of managed portfolios.
- **Practice Management Assistance:** Legend Financial extends assistance to advisors who need help running their businesses. Additional consultation and advising services are available to all financial advisor clients on a case-by-case basis.

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## **McMahon Financial Advisors, LLC Review**

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McMahon Financial Advisors, LLC brings to the table over 20 years of experience, helping clients throughout the Pittsburgh area reach and even surpass their financial goals. They specialize in investment management, business services, education planning, as well as retirement and estate planning.

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

Below are key factors that enabled McMahon Financial Advisors to be rated one of this year's top 11 financial advisory firms in the greater Pittsburgh, Pennsylvania, area.

[A Dual Portfolio Program:](#)

Clients reserve access to two different portfolio approaches. Both portfolios allow uninterrupted online access. Let's take a brief look at both:

- MAP Portfolio Program: The MAP Portfolio Process utilizes advanced financial planning technologies and pairs them along with your advisors' experience. The premise here is to create a client-focused "MAP" for the road ahead.

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- Compass Portfolio Program: The Compass Portfolio Program offers sophisticated portfolio management services for investors while utilizing robust EFT portfolios. This plan offers seamless integrations with the MAP aggregation tools which provide a 360 degree view of clients' financial lives.



### Expert Investment Management:

McMahon Financial offers a competitive advantage for their clients while utilizing a system of personalized service and state-of-the-art technology. They rely on quantitative and qualitative research to evaluate client holdings and define asset allocation goals.

### Business Services:

Managing risk within a portfolio is one of the cornerstones of McMahon Financial's successful business strategies. Here is a brief overview of services offered:

- Defined Benefits Planning
- Deferred Compensation Planning
- Buy-Sell Arrangements
- Asset Protection
- 401k Formation and Maintenance
- Key Person Coverage

### Secure Estate Planning:

McMahon Financial has over 20 years of estate planning experience and believes that individual assessment and careful planning allows clients to enjoy a secure and fulfilling estate plan. Through the coordination of tax and

law professionals, McMahon Financial ensures that your financial security is their top priority.

### Retirement and Education Planning:

McMahon Financial begins your planning process by clearly identifying your goals and objectives. They are firm believers that an early start is paramount to accomplishing your goals, so it's never too early to talk about planning for your children's education or your own retirement. Clients receive individual evaluation of goals and ever-changing needs.

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## **Conclusion – Top 11 Best Financial Advisors in Pittsburgh, Pennsylvania**

Now that you've carefully read over all the details about the top financial advisors in and around Pittsburgh, Pennsylvania, you are either feeling more confident than ever about what exactly your financial needs are, or you may have several additional questions.

So what do you do now? Your best bet is to narrow down this list of the top 11 financial advisors in Pittsburgh by getting rid of advisors that don't serve clients within your specific demographic or perhaps don't match up with your vision. After that, it's time to communicate with a few prospective financial advisors and feel out which potential advisor is suited for your needs.

Whichever advisor you choose to get to know a little better, make sure when you do make contact that you're prepared.

Gather your financial documents and create a list of questions or relevant information that you wish to discuss. Above all, enjoy the process for what it is and know there is a financial advisor in the Pittsburgh area that can help you reach your financial goals.

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Cheers,  
AdvisoryHQ Team