

# Top 13 Advisors and Wealth Managers in Ohio

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## 2016 RANKING OF TOP WEALTH ADVISORS

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### **Finding a Top Financial Advisor in Ohio (Columbus, Cleveland, Toledo, Cincinnati...)**

Are you seeking a top rated financial advisor in Columbus, Ohio? Or are you looking for the best fee-only wealth management firm in Cleveland, Cincinnati, Toledo, Akron or in any of the many cities across Ohio? Like individuals and families all across the country, Ohio residents work hard to create a secured future for themselves.

Most of that future depends on saving diligently and managing those savings wisely.

However, while wealth accumulation is something many of us are very comfortable doing, it's investing, protecting, growing, and managing that wealth which is always the hard part.

That's where we need help the most!

And that is precisely where a good Ohio financial advisor and wealth manager comes in.

Whether it is an individual, a small team or a large firm of seasoned professionals – depending on your individual circumstances – a top rated financial planner in Ohio can play an important role in helping you manage your wealth.



## **Which Wealth Manager in Ohio Is Best for You?**

When it comes to finding a fee-only advisor in Ohio, there are some key questions that most Ohioans ask themselves:

1. Which financial advisor, planner or asset manager in Ohio should I be working with?
2. Which of these Ohio advisors is best for me?
3. Which are the best fee-only financial advisors and wealth managers in Ohio?

Here at AdvisoryHQ, we've heard similar questions asked by people across the country, and we've done something to address them.

### **Due Diligence in Finding the Top Ohio Financial Planners**

In the sections below, you'll find some great information, resources, performed due diligence, and links to rely on when answering some of your questions about financial advisors and wealth managers in Ohio. Use this information as a starting point in your search for an advisor that's right for you.

AdvisoryHQ has invested a lot of diligence in identifying, reviewing, finalizing, and putting together this list of the best fee-only Ohio financial advisors and wealth management firms that you see below.

So, while you still need to carefully review all of the details we've accumulated about each firm and assess each on its suitability for your particular needs, what you won't need to do is spend copious amounts of time scouring the Internet to find some of the top Ohio financial advisors and wealth managers.

You'll find most of them already listed below!

### **Best Ohio Fee-Only Financial Advisors & Asset Managers**

Below is this year's list of the top rated Ohio financial advisors, wealth management firms, and financial planners who serve clients in communities in and around the below cities in Ohio:

- Akron
- Beachwood
- Cincinnati
- Cleveland
- Columbus
- Pepper Pike
- Uniontown

### **List of Top Fee-Only Financial Advisors in Ohio**

Sorted alphabetically:

- Beacon Financial Partners
- Budros, Ruhlin & Roe, Inc.
- Carnegie Investment Counsel
- Cornerstone Capital Advisors
- Fairport Asset Management
- Foster & Motley
- Hamilton Capital Management
- MAI Capital Management
- NCA Financial Planners

- [Sequoia Financial Group](#)
- [Spero-Smith Investment Advisers](#)
- [Summit Financial Strategies](#)
- [Truepoint Wealth Counsel](#)

This resource has been specifically tailored for those of you that wish to identify a top rated, fee-only financial advisor in Ohio that's the right fit for you.

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### **Top 13 Advisors and Wealth Managers in Ohio**

<b>Firm</b>	<b>Location</b>
Beacon Financial Partners	Statewide
Budros, Ruhlin & Roe, Inc.	Statewide
Carnegie Investment Counsel	Statewide
Cornerstone Capital Advisors	Statewide
Fairport Asset Management	Statewide
Foster & Motley	Statewide
Hamilton Capital Management	Statewide
MAI Capital Management	Statewide
NCA Financial Planners	Statewide
Sequoia Financial Group	Statewide
Spero-Smith Investment Advisers	Statewide
Summit Financial Strategies	Statewide
Truepoint Wealth Counsel	Statewide

## AdvisoryHQ's Selection Methodology

We've used AdvisoryHQ's proprietary methodology to select the names on our list of the top Ohio financial and wealth management advisors and have also provided additional information in the tables below to make your search that much easier.

Click here for a detailed overview of our selection methodology: [AdvisoryHQ's Financial Advisor Selection Methodology](#).

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## What We Like About These Top Independent Advisors In Ohio

The table provided below highlights some of the things that we like about each of the advisors in our list.

The purpose of this information is to provide our readers/visitors with a quick overview of the unique characteristics about each of the advisors highlighted in this directory.

Advisors	What We Liked About These Advisors
<b>Beacon Financial Partners</b>  <b>Detailed Review of Beacon Financial Partners</b>	<ul style="list-style-type: none"><li>• <a href="#">Beacon Financial Partners</a> is an independent, fee-based financial planning and wealth management consulting firm in Northeast Ohio</li><li>• The company offers unbiased, conflict-free guidance and wealth management advice to its clients without being restricted to specific/ proprietary products or services</li><li>• In addition to catering to the needs of high-net-worth individuals and families, the firm also assists corporations and small business entities with their financial planning and business planning needs</li><li>• Clients are served by a large team of 15+ advisors, more than 15 support staff, and through strategic partnerships with leading broker-dealers and clearing/trading house partners</li></ul>

<p><b>Budros, Ruhlin &amp; Roe, Inc.</b></p> <p><b>Detailed Review of Budros, Ruhlin &amp; Roe</b></p>	<ul style="list-style-type: none"> <li>• Founded in 1979, <b>Budros, Ruhlin &amp; Roe</b> has since established itself as one of the most respected fee-only wealth management firms in Columbus, Ohio and across the US</li> <li>• The company provides independent, unbiased advice and services to its clients, earning client trust that has allowed it to manage over a billion dollars in client assets</li> <li>• The company serves its clients in the capacity of a fiduciary, which means its advisors are legally and professionally bound to put clients’ interests ahead of all other considerations The company and its advisors have earned numerous awards and accolades, including <i>Barron’s</i> “Top 100 Advisors,” a finalist of the 2015 <i>Smart Women Awards</i> , and 2015 <i>Financial Times</i> “300 Top Registered Investment Advisors”</li> </ul>
<p><b>Carnegie Investment Counsel</b></p> <p><b>Detailed Review of Carnegie Investment Counsel</b></p>	<ul style="list-style-type: none"> <li>• <b>Carnegie Investment Counsel</b> is an exclusive fee-only investment advisory firm in <b>Cincinnati and Pepper Pike, OH</b></li> <li>• Since its inception in 1974, the company has now become Cleveland’s leading investment management and planning firm</li> <li>• Clients are provided with a broad range of personalized investment supervisory, financial planning and investment, and portfolio management services</li> <li>• The company acts as a fiduciary to its clients and does not receive any hidden benefits or “soft dollars” from any other third parties</li> <li>• Its clients are conveniently served through four offices: two in Ohio and one each in Philadelphia and Florida</li> </ul>
<p><b>Cornerstone Capital</b></p>	<ul style="list-style-type: none"> <li>• Founded in 1984, <b>Cornerstone Capital Advisors</b> is a <b>Uniontown, OH</b>-based financial advisor that has been in business for over 30 years, assisting a broad array of</li> </ul>

<p><b>Advisors</b></p> <p><b>Detailed Review of Cornerstone Capital Advisors</b></p>	<p>clients deal with a range of financial planning and wealth management challenges</p> <ul style="list-style-type: none"> <li>• The company is a fee-only Registered Investment Advisor that offers independent, unbiased, conflict of interest-free advice and services to its clients</li> <li>• The firm has a diversified experience profile, which it uses to assist clients that include individuals, business owners, executives, professionals, families, pension and profit sharing plans, trusts, estates, charitable organizations, and businesses</li> <li>• The company also specializes in providing women with a unique set of financial advisory assistance that they need in dealing with life-changing situations such as marriage, divorce, planning for their children’s futures, caring for aging parents, career changes, and much more</li> </ul>
<p><b>Fairport Asset Management</b></p> <p><b>Detailed Review of Fairport Asset Management</b></p>	<ul style="list-style-type: none"> <li>• <b>Fairport Asset Management</b> traces its roots back to 1963, delivering a broad array of fee-based services to high-net-worth individuals and families</li> <li>• This <b>Cleveland, OH</b> wealth manager works collaboratively with clients and other professionals to deliver highly personalized and coordinated implementation of its clients’ investment, retirement, tax, and estate plans</li> <li>• While offering a range of “traditional” financial planning and wealth management solutions, the company also offers specialized services for women, professionals/executives, and business owners to deal with transitions in their financial lives</li> <li>• The firm was named as one of the nation’s best managed firms in 2005 by Moss Adams LLP</li> </ul>
<p><b>Foster &amp; Motley</b></p> <p><b>Detailed Review of</b></p>	<ul style="list-style-type: none"> <li>• <b>Foster &amp; Motley</b> is a Registered Investment Advisor (RIA) in <b>Cincinnati, OH</b></li> </ul>

<p><b>Foster &amp; Motley</b></p>	<ul style="list-style-type: none"> <li>• <b>The firm is</b> dedicated to providing unbiased, independent, fee-only financial planning and investment management services to its clients The company has been in business since 1996 and acts as fiduciaries to its clients, always putting client interests ahead of any potential conflicts of interest that may occur in the delivery of services to clients</li> <li>• The firm is committed to continually improving and enhancing its financial planning and investment management processes and techniques, always leveraging new tools and strategies that will deliver better value to its clients</li> <li>• As part of its service enhancement strategy, the company invests heavily in upgrading staff skills through training and knowledge building events The firm uses a proprietary “expert” computer model to evaluate and monitor stocks on an ongoing basis, which are used in client portfolios</li> </ul>
<p><b>Hamilton Capital Management</b></p> <p><b>Detailed Review of Hamilton Capital Management</b></p>	<ul style="list-style-type: none"> <li>• <b>Hamilton Capital Management</b> was founded in 1997 and is based in <b>Columbus, OH</b></li> <li>• The firm offers a wide range of services to its clients, including investment management, wealth management, and 401(k) plans and services as fiduciaries</li> <li>• The company now ranks as one of central Ohio’s largest independent, fee-only financial advisors The firm has been consistently recognized as one of the leading wealth management firms in the country</li> <li>• The company uses a proven investment management process that changes portfolio asset allocation based on changes in fundamentals of the underlying asset class</li> <li>• The firm rigorously screens all outside managers, both active and passive, for client assets before recommending them to clients for externally managed asset programs</li> </ul>



<p><b>MAI Capital Management</b></p> <p><b>Detailed Review of MAI Capital Management</b></p>	<ul style="list-style-type: none"> <li>• <b>MAI Capital Management</b> is a <b>Cleveland, OH</b> based wealth manager</li> <li>• The firm was initially established in 1973, under a different name, and has since evolved into its current entity</li> <li>• The company caters to a select group of clients that include high-net-worth and ultra-high-net-worth individuals and families; sports professionals; pension, profit-sharing, and employee benefit funds; endowments; trusts; and certain types of corporations</li> <li>• Clients are served by a large team of 25+ professionals that are supported by a team of 30+ support staff members</li> <li>• Over 70% of the firm’s professionals hold advanced certifications and other industry designations and accreditations</li> <li>• The company brings together a diverse team of experts that includes Certified Public Accountants, Certified Financial Planners, and Chartered Financial Analysts</li> <li>• The firm offers a diverse range of services, from investment and integrated wealth management to family office services and a broad array of concierge services</li> </ul>
<p><b>NCA Financial Planners</b></p> <p><b>Detailed Review of NCA Financial Planners</b></p>	<ul style="list-style-type: none"> <li>• Established in 1989, <b>NCA Financial Planners</b> is a top rated <b>Cleveland, OH</b> wealth manager The company has been serving clients on a fee-only basis for over 30 years</li> <li>• Periodically, the company also hosts educational and investment seminars for its clients and potential clients</li> <li>• The firm is structured as a group of 5 teams that work collaboratively to deliver a set of uniquely specialized services to clients including investment management,</li> </ul>

	<p>retirement planning, estate planning, 401(k) rollover, and more</p> <ul style="list-style-type: none"> <li>• In addition to a suite of integrated services, the company may also provide financial planning and/or consulting services on a stand-alone fee basis, adding flexibility for a certain segment of its client base to benefit from the team’s expertise</li> <li>• The firm has a relatively modest minimum requirement of \$100,000 for clients wishing to initiate a separately managed account (SMA) relationship. Most other investment advisory services do not generally require any account minimum</li> </ul>
<p><b>Sequoia Financial Group</b></p> <p><b>Detailed Review of Sequoia Financial Group</b></p>	<ul style="list-style-type: none"> <li>• <b>Sequoia Financial Group</b> has been in business for nearly 24 years, offering broad-based financial planning, wealth management, and other related services to its clients</li> <li>• The company’s advisors and professional staff serve clients in a salaried, non-commissioned capacity, making the advice offered unbiased and conflict of interest-free</li> <li>• Over the years, the company has been widely recognized and applauded by industry watchers and mainstream financial media for its outstanding achievements</li> <li>• The company uses exceptional diligence when hiring its professional staff, ensuring only those with outstanding qualifications and experience and a desire to forge personal bonds with clients make the cut</li> <li>• Through its Service Excellence Group, the company adds another layer of personalized communication and support for clients – something not provided by other peer organizations</li> </ul>
<p><b>Spero-Smith Investment Advisers</b></p> <p><b>Detailed</b></p>	<ul style="list-style-type: none"> <li>• <b>Spero-Smith Investment Advisers</b> is based in <b>Cleveland, OH</b> and has been in the financial planning and investment management business since 1972,</li> </ul>

<p><b>Review of Spero-Smith Investment Advisers</b></p>	<p>bringing over 40 years of experience to bear when advising its clients</p> <ul style="list-style-type: none"> <li>• The company is an SEC Registered Investment Advisor (RIA), which means its advice is independent, unbiased, and always in the sole interest of the client</li> <li>• In addition to industry-respected credentials, the team is highly experienced, with over 125 years of collective experience brought into play when advising clients</li> <li>• The company follows proven investment strategies and time-tested, disciplined processes to help clients succeed in meeting their financial goals</li> <li>• The company is guided by an independent, external Advisory Board comprising seasoned business professionals</li> </ul>
<p><b>Summit Financial Strategies</b></p> <p><b>Detailed Review of Summit Financial Strategie</b></p>	<ul style="list-style-type: none"> <li>• <b>Summit Financial Strategies</b> is an SEC Registered Investment Advisor (RIA) in <b>Columbus, OH</b></li> <li>• The firm provides independent, unbiased, fee-only services to clients across the country</li> <li>• The firm started off as a 2-member team in 1995 but has since grown into a multi-skilled 20member team</li> <li>• Clients not only work with their dedicated personal advisors but are also supported by additional associates of the firm</li> <li>• As an RIA, the company’s professionals work as fiduciaries for their clients, receiving compensation from no third parties</li> <li>• Clients may optionally tap into the firm’s vast network of contacts with other professionals to benefit from other non-investment services such as estate planning, tax planning, and insurance planning</li> </ul>

<p><b>Truepoint Wealth Counsel</b></p> <p><b>Detailed Detailed Review of Truepoint Wealth Counsel</b></p>	<ul style="list-style-type: none"><li>• <b>Truepoint Wealth Management</b> was founded in 1990 as one of the first independent, fee-only financial advisory firms in the greater Cincinnati area</li><li>• As fiduciaries, the company's advisors provide independent, unbiased, conflict of interest-free, fee-only customized advice based on each client's unique needs</li><li>• As a 100% employee-owned company, clients have peace of mind knowing that the advisors of the firm are fully vested in their clients' and the firm's success</li><li>• The company's investment philosophy is based on an intimate understanding of market history, sound analysis, and deep conviction of what works and what doesn't</li><li>• A core theme of the company, for building client portfolios, is to use low-cost index funds that are proven to reduce costs and deliver comparatively better portfolio performance over time</li></ul>
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Questions or comments about this review?

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Cheers,

AdvisoryHQ Review Team