

Top 13 Financial Advisors in Florida | 2017 Ranking | Florida Wealth Management Firms

2017 RANKING & REVIEWS TOP RANKING BEST FINANCIAL ADVISORS IN FLORIDA

Finding the Best Financial Advisors in Florida

Florida is known for its glam and its luxury, which means there is a lot of money circulating the Sunshine State. But if you want to keep the good times going without going bust, you'll need professionals to expertly manage your money. This is where finding the best financial advisors in Florida comes in.

A wealth management firm in Florida can help you figure out how to live the lifestyle you want while also ensuring there is money leftover to live comfortably in your old age. That said, trusting your life's earnings to just anyone is not the smartest move to make. Instead, it takes time and effort to find a Florida financial advisor that is qualified *and* trustworthy.

We've rounded up 13 of the best wealth management firms in Florida, so that you can protect what you have, identify what you want, and diligently work towards achieving your financial goals.



Award Emblem: Top 13 Financial Advisors in Florida

AdvisoryHQ's List of the Top 13 Best Financial Advisors in Florida

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

- [**Cathy Pareto & Associates Inc.**](#)
- [**Certified Financial Group**](#)
- [**Dimension Capital Management**](#)
- [**Evensky & Katz/Foldes Financial**](#)
- [**FirsTrust**](#)
- [**Investor Solutions RIA**](#)
- [**Lassus Wherley**](#)
- [**Moisand Fitzgerald Tamayo LLC**](#)

- [Resource Consulting Group](#)
- [Ruggie Wealth Management](#)
- [SingerXenos](#)
- [The Enrichment Group](#)
- [Water Oak Advisors](#)

Top Financial Advisors in Florida | Brief Comparison

Financial Advisors in Florida	Highlighted Features
Cathy Pareto & Associates	Life Event Planning
Certified Financial Group	Social Security Planning
Dimension Capital Management	Tempered Investment Process
Evensky & Katz/Foldes Financial	Qualified Retirement Plans
FirsTrust	Retirement Planning
Investor Solutions RIA	Advisory Services for Non-Profit Organizations
Lassus Wherley	Family Office Services
Moisand Fitzgerald Tamayo, LLC	Service for Sudden Wealth Recipients
Resource Consulting Group	The Seven Investment Fundamentals
Ruggie Wealth Management	Business Planning
SingerXenos	Advisory Services for Entrepreneurs
The Enrichment Group	Legacy Building
Water Oak Advisors	Sample Wealth Plan

Table: Top 13 Best Financial Advisors in Florida | 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 Financial Advisors in Florida

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

See Also: [Top Financial Advisors in Dallas, TX | Ranking | Dallas Area Wealth Managers](#)

Cathy Pareto & Associates Review

[Cathy Pareto](#) is a [fee-only](#) wealth management firm in Florida. Its founder, Cathy Pareto, was recognized by Forbes as one of the Top 10 Most Dependable Wealth Managers for Women in the U.S. This financial advisor in Florida has close to 20 years of experience helping individuals manage their money.



Focused Financial Planning

You have a pretty good idea of what your financial goals are. [Financial planning](#) helps you fill in the blank space between fantasy and reality. A wealth management firm in Florida can help you turn your dreams into goals by coming up with a step-by-step process of how to structure your spending, savings, and investing.

The Florida financial advisors at Cathy Pareto will take you through a meticulous process that helps you answer questions related to saving for retirement, retiring early, your risk tolerance, your current investments, and more.

The team of advisors at this wealth management firm in Florida can also help you figure out how to manage conflicting goals like your child's education vs. your dreams to retire early.

Investment Management

Once you've decided what kind of financial goals you're aiming for, you'll need some ammunition and that firepower comes in the form of your investment strategy. Growing your existing capital requires an understanding of the stock

market, and your Florida financial advisor can give you the expert knowledge you need to strategically grow and protect your assets.

This wealth management firm in Florida offers [investment management services](#) for:

- Individuals
- Trusts
- Families
- Small Business Owners
- Guardianships
- Non-traditional families

They can specifically help each of these clients with the following areas of investment management:

- Asset allocation
- Investment selection
- Reports (i.e. Quarterly Market Updates and Ongoing Account Reviews)

Life Event Planning

Traditional financial planning makes some educated guesses about what direction your life will take. You may plan for children, retirement, buying a second home with a spouse, and more. But there are also times when life is unpredictable.

When the unexpected happens, this wealth management firm in Florida can help you sort out your finances and come out on top. They provide [financial guidance](#) in the event of divorce proceedings, loss of a spouse, and more.

Don't Miss: [Best Financial Advisors in New York, NY | Ranking | New York Wealth Management Firms](#)

Certified Financial Group Review

[Certified Financial Group](#) emphasizes something that a lot of people looking for a financial planner needs to hear: A financial plan is meant to serve you

during good times and bad. In good times, your plan is a perfect roadmap and in bad times it serves as a touchstone that you can refer to.

The team of Certified Financial Planners in Florida has close to [300 years](#) of combined experience.

Certified Financial Group is a [fee-only](#) wealth management firm in Florida.

Social Security Planning

There are a lot of misconceptions floating around about social security. A wealth management firm in Florida can help people sort through these misconceptions and figure out how to maximize their social security earnings.

According to Certified Financial Group, social security benefits make up approximately [20% - 50%](#) of a retiree's retirement income. It is also a very unique retirement asset. As this Florida financial advisory firm [outlines](#), Social Security:

- Is annually adjusted for inflation
- Is tax-advantaged
- Pays out as long as you live
- Is guaranteed by the government

A Florida wealth management firm like Certified Financial Group can help clients make smart financial decision when it comes to Social Security benefits.

Employer-Sponsored Plans

This wealth management firm in Florida offers a unique combination between an SEC Registered Investment Advisor and a third-party administrator.

This Florida financial advisory firm manages plans for not-for-profits, corporations, and government entities. Clients are protected from [two of the major liabilities](#) that face employers who offer retirement plans: plan expenses and employee education.

The Certified Difference!®

Certified Advisory Corp <i>An SEC Registered Investment Advisor</i>	Certified Benefits Corp <i>A Third Party Administrator/Recordkeeper</i>
delivers...	delivers...
Co-Fiduciary Responsibility Fee Only Services 100% Revenue Sharing Full Disclosure Thousands of NO Load Funds* Advanced Investment Selection	Morningstar® as fiduciary to plan participants Daily Valuation Open Architecture Custom Plan Design Customized Enrollment Kits & Statements Customized Plan Sponsor Website

Workshops

A good wealth management firm in Florida will go out of its way to keep its clients educated. The financial advisors at Certified Financial Group organize regular workshops for their clients. Proactive individuals can benefit from having an expert manage their finances *and* educate them about their finances.

Their upcoming workshops include:

- Social Security Boot Camp
- When Can You Retire? Know Your Number
- Countdown to Retirement
- Healthcare Options in Retirement
- Financial Basics for Life: Strategies for Success

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

Dimension Capital Management Review

[Dimension Capital Management](#) is a Florida financial advisory firm that serves high net worth clients. They are committed to meeting the unique financial needs of their clients and strive to provide original solutions for individuals, families, and institutions alike.

Dimension Capital Management is a [fee-only](#) wealth management firm in Florida.

Comprehensive Wealth Management Services

[Wealth management](#) and investment advice is provided by this Florida financial advisory firm. They have a team of global experts that can provide customized solutions for the dynamic needs of their client base. Both U.S. and offshore investors can benefit from this Florida wealth management firm's portfolio and investment management services.

This Florida wealth management firm has also cultivated relationships with a network of third party providers in order to access expert advice when it comes to the estate, tax, and trust service needs of its clients.

Tempered Investment Process

This Florida wealth management firm's [investment process](#) balances innovation and discipline. They have developed an investment process that helps clients gain returns while also taking into consideration their individual risk tolerance and objectives.

This Florida wealth management firm's disciplined [approach to investing](#) consists of the following five steps:

1. Understanding client needs
2. Macroeconomic factor analysis
3. Asset allocation and identification of investable themes
4. Manager selection
5. Portfolio construction & monitoring

Evensky Katz/Foldes Financial Review

[Evensky & Katz/Foldes Financial](#) has been providing financial advice and wealth management services for over thirty years. This wealth management firm in Florida has approximately [\\$1.6 billion](#) in assets under management and maintains relationships with over 800 clients.

Evensky & Katz/Foldes Financial is a [fee-only](#) wealth management firm in Florida.

Financial Planning Based Investment Management

This wealth management firm in Florida helps clients grow their money in order to fulfill their ambitious future plans. Investing is easier when you have an idea of what you are working towards, which is why these advisors provide [financial planning based investment management](#) also known as wealth management.

These financial advisors in Florida start by having an in-depth conversation with clients in order to develop an investment policy statement that reflects the individual's needs. The investment policy statement serves as the document of reference when it comes to figuring out what you are working towards. It acts like the client's financial roadmap.

This investment policy statement developed by your Florida financial advisors also takes important variables into consideration including various investment options, taxation, and more.

Qualified Retirement Plans

This wealth management firm in Florida does not just provide investment advice to individuals. They also provide financial advisory services for firms and institutions retirement plans. They can assist institutions with 401(k) plans, SEP plans, and profit sharing trusts.

This Florida wealth management firm also provide written acknowledgement of their role as an ERISA fiduciary.

Their approach is similar to the role they play as financial advisors to individuals in the sense that they help firms by identifying specific investments and presenting different investment models for qualified retirement plan participants to select.

Client Resources

Accessing the advice of professionals is a smart move, but most people still want to have some idea of what is going on. This wealth management firm in Florida offers several clients resources on their website. There are [newsletters](#) from November 2008 to the present available on their website that allows individuals to keep up with relevant news.

They also regularly update a blog with articles on financial advice, topics, and news.

Popular Article: [Best Financial Advisors in Seattle, Bellevue, & Kirkland WA | Ranking | Seattle Area Wealth Management Firms](#)

FirsTrust Review

People often pay a lot for a financial advisor to push products, not to actually provide advice. [FirsTrust](#) rebels against this model by providing financial advice that serves to work in the best interests of its clients. They preserve the objectivity of their firm's financial advice by working as a [fee-only](#) wealth management firm in Florida.

Retirement Planning

Retirement planning is a key part of every financial plan. We can't avoid old age. The best we can do is plan for it - with the help of a Florida financial advisor if you can.

This wealth management firm in Florida impresses upon its clients that successful retirement planning is about more than simply parking some money into savings. According to FirsTrust, effective retirement planning requires an understanding of specific variables like your income needs in retirement and taxes to live comfortably.

This Florida financial advisory firm can help clients with the following specifics of [successful retirement planning](#):

- Creating a tax-efficient retirement strategy
- Setting a monthly budget to manage spending
- Using the web to monitor accounts and track progress

- Understand the potential impact you may have on yourself, your family, and your legacy

Dynamic Estate Planning

Estate planning suffers from some of the same misconceptions as retirement planning does. In the same way that effective retirement planning is about more than just siphoning off some money into a savings account, estate planning is about more than just writing a will and locking it away.

As this FirsTrust [puts it](#), “Estate planning is not a legal document or an insurance policy. It’s a creative process that can result in unlimited benefits.” This wealth management firm in Florida can help you develop that creative process to help you do the [following](#) and more:

- Avoid financial conflicts within the family
- Protect heirs from spendthrift concerns
- Mitigate federal estate taxes
- Provide financial management in the event of disability
- Retain and protect family heirlooms
- Avoid postmortem legal proceedings
- Protect and/or dispose of business interests
- Ensure spouses are financially secure
- Guarantee future college educations

And more.

[Read More: Best Financial Advisors in Portland, OR | Ranking | Portland Wealth Management Firms](#)

Investor Solutions RIA Review

[Investor Solutions RIA](#) provides guidance for individuals who wish to achieve financial independence and work towards specific life goals. Financial peace of mind for its clients is this Florida wealth management firm’s objective.

Investor Solutions RIA is a [fee-only](#) wealth management firm in Florida.

Advisory Services for Non-Profit Organizations

A non-profit organization's wealth management needs are two-fold. First of all, it has a responsibility to its donors to ensure money is managed effectively and efficiently. Second of all, a non-profit organization's ability to initiate projects and fulfil its mandate depends on how well it manages its resources.

Smart management and strategic investing allows non-profit organizations to attract more donors, benefit from strong returns, reduce liability, and enhance the stature of their institution. This wealth management firm in Florida can help non-profit organizations with the [following](#):

- Effective investment policies and risk mitigation
- Lowering organizational costs
- Fiduciary consulting and education

Generating Retirement Income

Retirement planning is a tricky mix of strategizing and fortune telling. Figuring out how much income you'll need in retirement are based on a few things you can definitely plan (i.e. how much you put aside while you're working), some things you can somewhat predict with expert guidance (i.e. what the market will be like and the rate of inflation), and other factors you have no way of planning for (i.e. how long you will live).

A wealth management firm in Florida can help you weigh several different scenarios for varying longevity, standards of living, and market conditions.

This Florida financial advisory firm takes things a step further by providing financial planning that is tied to different stages of your life. When you're young, retirement planning is about taking full advantage of the fact that time (and compound interest!) is on your side. Later in life, retirement planning is about re-evaluating what you want.

This financial planning firm divides financial planning into the [following stages](#) of your life:

- Getting Started
- Mid Career
- Changing Jobs (i.e. implications of transferring qualified retirement plans, etc)
- Near Retirement
- In Retirement

Corporate Retirement Plan Sponsors

These Florida financial planners provide varied retirement plan solutions for clients. Different individuals need different solutions. A business owner wants to put together a plan that attracts and retains talented people and provides benefits for their valued employees. Plan fiduciaries want to limit their liabilities and benefit from safe harbour provisions.

This wealth management firm in Florida offers retirement plan solutions for the [following groups](#):

- Business owners
- Plan fiduciaries
- Human resources
- Employees

Lassus Wherley Review

[Lassus Wherley](#) is a wealth management firm in Florida that's been serving individuals, couples, families, and more for over thirty years using a team-based approach. Their team has expertise in financial planning, tax preparation, trust services, and more.

Lassus Wherley is a [fee-only](#) wealth management firm in Florida.

Tax Preparation

Tax preparation is not a fun task. Gathering all the necessary paperwork, collecting relevant data, and keeping up to date with relevant tax legislation is a tedious task that can result in serious penalties if done incorrectly. This financial planning firm in Florida offers [tax preparation](#) services for interested parties.

That said, this team of Florida financial advisors is also happy to work with the tax professionals in your life while helping you with other elements of your financial planning and wealth management. This kind of collaborative approach ensures you are receiving a comprehensive financial advisory experience while working with these advisors.

Specific services from this Florida wealth management firm include:

- Strategies to reduce tax obligations
- Reviews by licensed Certified Public Accountants
- Year-round tax advice
- Representation during audits or letters of inquiry from tax authorities

Trust Services

Lassus Wherley provides [trust services](#) to its clients through its association with National Advisors Trust Company (NATC). Some financial situations are too complex for a family to handle on their own. In such cases, it becomes necessary to obtain the services of a Florida wealth management firm like Lassus Wherley.

Family Office Support

Managing your extensive finances and assets on your own can be time-consuming, especially when you are juggling a family and a busy career. This wealth management firm in Florida offers family office support for those families who want to turn over their household finances to professional hands.

They offer a full-range of [family office services](#) including:

- Oversight of elderly parents by working with healthcare providers
- Paying bills and reporting on financial transactions
- Monitoring personal assets
- Coordination of home maintenance which includes the supervision of contractors
- Managing the sale of a home
- Tax payments

- Estate administration

[Related: Best Financial Advisors in Boston, MA | Ranking | Boston Area Wealth Management Firms](#)

Moisand Fitzgerald Tamayo LLC Review

[Moisand Fitzgerald Tamayo](#)'s objective is to serve as a guiding light through any financial situation. In good times, their assistance means you have a well-defined plan for working towards your financial goals. In bad times, they are a source of stability to help you navigate financial uncertainty.

Moisand Fitzgerald Tamayo LLC is a [fee-only](#) wealth management firm in Florida.

Services for Sudden Wealth Recipients

You've heard the stories of people who win the lottery and wind up back in the financial hole within a few years. It sounds ridiculous, but it is entirely possible if you've never had any experience managing large amounts of money.

A million dollars - or two or three - may sound like a lot of money, but depending on your quality of life that is barely enough to live comfortably into old age. Factor in our tendency to fall victim to lifestyle inflation once we get a little more money and it makes sense that people who suddenly come into large amount of money quickly burn through it.

As Moisand Fitzgerald Tamayo [puts it](#), "New money can be a blessing or a burden."

This wealth management firm in Florida can help people who have recently come into a lot of money do the [following things](#) to maintain their financial security:

- Set goals and reasonable expectations
- Align your finances with your priorities
- Minimize your taxes
- Avoid scams that target the newly wealthy
- Help you navigate the influx of requests that come from friends and family

Services for Current Retirees

Retiring is both an exciting and scary time. Even if you were extremely proactive about putting money aside for retirement, you still may be exposed to risks due to market conditions. This Florida financial advisory firm can help you determine your level of exposure and answer pressing questions about your retirement nest egg. Several [questions](#) press on a retiree's mind, including:

- How long will my money last?
- How will I cover my healthcare expenses?
- Should I take pension payouts or a lump sum?
- What if my pension or Social Security benefits are cut?

- Should I convert to a Roth IRA?
- Could I afford to make a large donation to my church or a charity?

Resource Consulting Group Review

[Resource Consulting Group](#) prioritizes providing an accessible and comfortable experience for the client. Rather than bogging down clients with industry jargon and indecipherable fine print, they emphasize streamlined advice that gets straight to the point.

Resource Consulting Group is a [fee-only](#) wealth management firm in Florida.

The Seven Investment Fundamentals

True to their promise of giving it to clients straight and getting straight to the point, this wealth management firm in Florida clearly outlines their [Seven Investment Fundamentals](#) on their website.

1. Have an appropriate allocation to equities
2. Stay fully invested
3. Keep costs down
4. Use only short term bonds
5. Include small cap stocks
6. Include value stocks
7. Have broad diversification

This strategy is meant to help clients of this Florida financial advisory firm avoid the dangers of stock picking, high costs, market timing, and other get-rich-quick strategies that can seriously jeopardize the long-term growth and protection of assets.

Retirement Services

A common misconception is that a good plan has to be complex. This isn't the case. A well-done plan is easy to manage, follow, and understand. These financial advisors in Florida help clients build a plan that is efficient and allows business owners to honor their fiduciary responsibilities.

These financial planners and advisors in Florida can help you in the [following areas](#):

- Simplicity
- Plan wellness
- Fiduciary assurance
- Investment strategies
- Transparency of fees

Helpful Resources

The resources available on this Florida financial advisory firm's website are extensive. Clients who wish to educate themselves on investing, wealth management, and more can look through the many articles, videos, and recommended reading links on the website. There are also videos that help clients learn more about Resource Consulting Group's advisors. Available resources include:

- [Articles](#)
- [Advisor Videos](#)
- [Helpful Videos](#)
- [Recommended Reading](#)

- [Helpful Links](#)
- [Identify Theft](#)

Ruggie Wealth Management Review

[Ruggie Wealth Management](#) has been helping clients find financial success for over 25 years. Its president and CEO, Tom Ruggie, has been recognized as one of the top financial advisor in the country by publications like Barron's and Forbes.

Ruggie Wealth Management is a [fee-based](#) advisory firm in Florida. We have included them on this list for the range of services that they provide and the recognition the firm has received.

Independent Financial Advisory Firm

Ruggie Wealth Management is an [independent](#) financial advisory firm in Florida. They are not tied to or beholden to any corporate interests. This enables this Florida wealth management firm to make decisions that are in the best interests of their clients.

Estate Planning and Philanthropy

Leaving behind a great legacy takes planning. The Florida financial advisors at Ruggie Wealth Management can incorporate your estate planning needs and philanthropic desires into your personalized financial plan. This kind of forethought can minimize the amount of money that is given to the government in the form of taxes while providing for your family and doing some good within your community.

This wealth management firm in Florida can help you with the [following](#):

- Implementing your estate plan in partnership with your attorney and CPA
- Reducing or eliminating taxes by retitling assets
- Conducting reviews of your estate plan
- Coordinating your philanthropic endeavors and charitable contributions

Retirement Analysis

Asking a financial advisor in Florida to conduct a retirement analysis for you is a great way to preserve your peace of mind. This retirement analysis will consider multiple scenarios and make projections so that you can understand the potential situations you may be in during retirement. Understanding these potential scenarios allows you to prepare and have a plan of action ready.

Ruggie Wealth Management has developed what they call their Ruggie Method Distribution Strategy that uses a statistical method to conduct a thorough retirement analysis. This system is also ideal for foundations.



Business Planning

This Florida wealth management firm offers [financial guidance for business](#) as well as individuals. This team of advisors help businesses (in addition to foundations and endowments) take a long term view of their organization's finances in order to identify suitable investments.

This Florida financial advisory firm offers flexible financial guidance. Institutions can choose to hire Ruggie Wealth Management for end-to-end financial advice while others may wish to work with this firm on an a la carte basis as needed.

SingerXenos Review

[SingerXenos](#) is a Florida financial advisory firm that uses its extensive resources and data driven, research-based approach to provide the best advice for its clients. It was [recognized](#) as among the 100 most exclusive wealth management firms in the United States by Worth Magazine.

SingerXenos is a [fee-only](#) wealth management firm in Florida.

Private Individuals

Whether a client has earned their wealth during their career or came into a large inheritance, this wealth management firm in Florida does the same thing for all individuals: manage, preserve, and grow their wealth.

These Florida financial advisors work with each client to identify their goals and develop a plan that allows them to secure their financial futures. Investment strategies are regularly evaluated by advisors. Services provided to private individuals [include](#):

- Financial planning
- Portfolio management
- Financial counseling
- Tax planning
- Retirement planning

Women's Financial Services Division

Women face unique circumstances that impact their financial health and future. This means that they require distinct financial advice. This wealth management firm in Florida helps address the financial needs of women and plan for scenarios that include early widowhood and longer lifespan.

These Florida financial advisors can provide guidance before, during, or after a major life change. Working with a professional can give you a firm financial foundation when your emotional life is in turmoil.

SingerXenos also offers a learning and networking opportunity called [SX Women's Group](#). It's a personalized client experience that makes SingerXenos stand out from other wealth management firms in Florida.

Advisory Services for Entrepreneurs

Entrepreneurs and business owners make their fortune through innovation and calculated risk-taking. SingerXenos has help successful entrepreneurs in the Florida area grow their business and make big ideas happen for [over 30 years](#).

These Florida financial advisors can help business owners and entrepreneurs navigate a variety of financial situations and help them in a variety of areas, [including](#):

- Mergers and acquisitions
- Business growth

- Exit strategies
 - Tax advice
-

The Enrichment Group Review

Money comes with a lot of negative connotations: a lack of money, greed, or strife. [The Enrichment Group](#) aims to take the confusion and discord out of money by using thorough financial planning to help clients use their money to realize their dreams. They have been helping clients enrich their lives with financial planning and advice [since 1987](#).

The Enrichment Group is a [fee-based](#) wealth management firm in Florida.

Transition Planning

“When life changes, money changes. When money changes, life changes,” [says](#) The Enrichment Group. And they’re right. Money has huge implications on our life and our life has huge implications on our money. The trick is ensuring this cycle has positive effects.

Working with a Florida financial planner during a life transition can minimize the potential financial repercussions. This firm has experiencing coaching both individuals and families. Their [Enrichment Transition](#) program can help clients before, during, and after:

- Loss of a spouse
- Retirement
- Divorce
- Layoffs
- Inheritance
- Financial windfall

Their Enrichment Transition uses a step-by-step process that helps clients process the emotions of their situation before moving on to the financial implications of their situation. The process consists of [six steps](#):

- Step 1: Evaluate - Assess the Situation
- Step 2: Organize - Categorize into logical groups

- Step 3: Prioritize - Determine what is urgent and important
- Step 4: Stabilize - Deal with the Most Critical Issues
- Step 5: Insulate - Create a Decision-Free Zone
- Step 6: Financial Life Planning and Investment Management - Start planning and living your goals

Legacy Building

We all want to be remembered for something and we all yearn to make an impact during our time in the world. Legacy building usually describes the process setting up your charitable bequests. But the Florida financial planners at The Enrichment Group believe it is more than that. Legacy building is also about passing things along to your family including tangible things like property and intangible things like traditions and values.

This wealth management firm in Florida can help clients leave behind a legacy that is in line with their values. You can tie your inheritances to specific objectives and hopes you have for your heirs. Some examples of [activities you wish to encourage](#) as part of your legacy include:

- Pursuing an education
- Purchasing a home
- Pursuing a career
- Giving back to the community
- Creating new family traditions

This can be done with legacy building techniques that reward family members for practicing specific values with portions of their inheritance. For example, an heir may receive a certain amount of money after graduating from an undergraduate program and even more money for obtaining a graduate degree.

Some people may also choose to leave a handwritten note expressing their wishes for traditions they hope will be preserved.

WaterOak Advisors Review

More than a third of [WaterOak Advisors](#)' full-time staff hold advanced degrees and designations including the prestigious Chartered Financial Analyst designation and Certified Financial Planner designation. They combine education and experience to help their clients strategically and efficiently preserve their wealth and manage [\\$1.7 billion](#) in assets.

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

Comprehensive Financial Planning

This Florida financial advisory firm provides clients with the kind of planning that ensures their money isn't just growing, but being preserved as well. Their advisors will help clients untangle complex financial situations to see how they can help individuals work towards their goals with the resources they have.

Financial planning from this wealth management firm in Florida focuses on three essential areas: goals planning, tax planning, and estate planning. They use their trademarked Wealth Plus Consulting Process™ to offer individual clients the kind of comprehensive financial analysis and planning that is typically reserved for ultra high net worth individuals.

Sample Wealth Plan

This wealth management firm in Florida offers something unique for prospective clients. If you are on the fence about hiring a Florida financial advisor, it may be because you are a little uncertain about what a financial plan would include. You can receive a free, sample wealth plan by completing an [online form](#).

This sample plan will include the following documents:

- Wealth Plus Consulting Process™ Comprehensive Plan
- Planning Considerations and Opportunities
- Tax Projection

Conclusion - Top 13 Best Financial Advisors in Florida

Finding a financial advisor in Florida sets you up for a financial future without a cloud in sight. Being proactive and taking control of your finances early in life means you can enjoy life in the present while guaranteeing your comfort in the future.

Hiring a Florida wealth management firm isn't overwhelming. In fact, if the process seems uncomfortable it may be a sign that the firm you're choosing to work with is not a good fit. The good news is that many firms offer a free initial consultation - in some cases, as you've read in our review, they'll send a sample wealth plan! - and this gives you an opportunity to get to know your advisor.

With this article as your starting point, you are well on your way to finding one of the best wealth management firms in Florida.

Image sources:

- <https://pixabay.com/en/miami-florida-skyline-city-50553/>
- <http://financialgroup.com/401k-services/>
- <https://www.ruggiewealth.com/individuals/services/>

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