

Top 9 Best Financial Advisors in Austin, TX | 2017 Ranking | Top Austin Wealth Managers & Planners

2017 RANKING & REVIEWS TOP RANKING BEST FINANCIAL ADVISORS IN AUSTIN

Finding a Top Financial Advisor in Austin, Texas

If you have been thinking about using the services of a financial advisor in Austin, Texas, you are in good company. The need for financial advisors in Austin has risen steadily over the last couple of decades and is expected to grow more in coming years.

To meet this increasing demand, financial advisors are popping up everywhere. There are thousands of financial advisors and hundreds of wealth managers in Austin, Texas. So how do you choose the best financial planner in Austin, Texas who can work with you to help you achieve your financial goals?

Taking on the arduous task of finding a top financial advisor in Austin, Texas, would quickly send you pouring through more information than you could ever process and, if you're not already a seasoned professional yourself, you may be stumped about what even makes an average financial advisor in Austin an excellent one.



Award Emblem: Best 9 Financial Advisors in Austin, TX

And what about your other questions?

Which Austin financial advisor specializes in what? What are the average financial advisor fees in Austin, Texas? Which financial planner in Austin offers comprehensive services and which ones cover only the basics? What are the basics provided by Austin wealth managers?

How to Choose Financial Advisors in Austin

There is no one-size-fits-all answer. Services provided by wealth managers in Austin, Texas, can range from basic wealth management to stocks, bonds, and investments to life-event planning and retirement.

You'll find Austin financial advisors with a variety of fees, criteria, and even some with minimum requirements for investable assets. You'll even find some

financial planners in Austin who cater to a specific demographic, like women, business executives, retirees, or those who serve in the military.

In this never-ending sea of financial opportunity, you can rest easy if you are looking for financial advisors in Austin. The AdvisoryHQ research team has done most of the hard work for you, using a rigorous selection system to narrow down a comprehensive list of thousands of financial advisors in Austin, resulting in the final list of top 10 financial advisors and wealth managers in Austin, Texas, presented in this article.

Read on to understand what we based our selections on, and what makes each Austin-based advisory firm one of our top picks.

[See More: Best Financial Advisors in D.C., Maryland, and Virginia \(Tri-State\)](#)

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

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

- [**Austin Asset**](#)
 - [**Barnett Financial**](#)
 - [**Bell Wealth Management**](#)
 - [**Briaud Financial Advisors**](#)
 - [**Durbin Bennett Private Wealth Management**](#)
 - [**ML&R Wealth Management**](#)
 - [**Pauley Financial**](#)
 - [**Richard P. Slaughter Associates**](#)
 - [**WorthPointe**](#)
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Top 9 Best Financial Advisors in Austin| Brief Comparison

Austin Financial Advisors	Fee Structure	Who They Serve
Austin Asset	Fee-only	High Net Worth Families Non-profits
Barnett Financial	Fee-only	High Net Worth Families and Individuals
Bell Wealth Management	Fee-only	Private Clients Multi-generational Families Physicians
Briaud Financial Advisors	Fee-only	High Net Worth Families and Individuals Family Businesses Medical Professionals University Professors and Administrators
Durbin Bennett Private Wealth Management	Fee-only	Individuals and Families Family Offices
Pauley Financial	Fee-only	High Net Worth Families and Individuals Medical Professionals Business Owners Independent Women Family Office Services
Richard P. Slaughter Associates	Fee-only	High Net Worth Individuals and Families Business Owners Business Professionals Sudden Wealthy
WorthPointe	Fee-only	Families

		Individuals Business Owners
ML&R Wealth Management LLC	Fee-only	Retirees Women Company 401(k)p Plans Professionals Business Owners

Table: Top 9 Best Financial Advisors in Austin | 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 – The Top 9 Best Financial Advisors in Austin and Wealth Management Firms in Austin, TX

Below, please find the detailed review of each of the best financial advisors in Austin included in our ranking of the top Austin financial advisors. We have highlighted some of the factors that allowed these Austin financial advisors to score so well in our selection ranking.

Note: *In addition to what’s highlighted below, most of these financial advisors and wealth managers have been selected based on their fee-only, independent, and fiduciary status. This means that they receive no commissions and do not sell any products. As such, they’ve eliminated the conflict of interest that is normally associated with commission-based advice.*

Also, their independent status (not part of big institutional firms) allows them to maintain their objectivity in providing you with the best possible advice to help you achieve your personal and business goals.

[Don't Miss: Top Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee](#)

Austin Asset Review

As a financial advising firm founded over [25 years ago](#), [Austin Asset](#) has been blazing trails for a long time. The firm was one of the first to offer fee-only services (meaning the financial information you are given is not driven by the sale of another product or service, making your best interest the top priority).

Austin Asset firm offers a variety of tools and provides wealth management and wealth planning services to high net worth families and non-profit organization in the greater Austin area.



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

A Solid System

Few firms have created a targeted approach like Austin Asset. They've taken the services they offer and created various systems and tools to give you the most comprehensive approach available.

Two examples are their Building Organized Wealth (BOW) and Actual Rate of Return on Wealth (ARROW) models. Each is designed to meet specific client needs while looking ahead to building a strong financial future.

You can [take a comprehensive look at both models](#) to see which one may be right for you.

Large-Scale Boutique Style

While Austin Asset reminds us that they are in fact a boutique firm, catering to a smaller selection of clients to provide the best and most personalized service, they are certainly not lacking in any department.

Not only does their staff consist of approximately 18 Certified Financial Planners, accountants, advisors, and executives, their Business Advisory Board is comprised of four additional professionals who are the best of the best, an invaluable asset to their team and your financial future.

Furthermore, Austin Asset has an Investment Policy Committee that meets periodically to discuss current market trends, news, and investment philosophies. This truly shows the strong core they have built in their company.

The Value of Information

As you get to know the ins and outs of your prospective financial advisor,

allow us to point you in the direction of Austin Asset's [quarterly newsletter](#), as well as their [blog](#), two tools that are full of information that anyone seeking a financial perspective needs to know.

Barnett Financial Review

[Barnett Financial](#) is a personal wealth management firm in Austin, Texas that provides long-term family financial planning and investment management to a select number of clients. Their goal is to cover a broad range of financial planning and investment services tailored specifically to their clients' needs. In fact, they are so intent on putting you first, you'll find their dedication in all they do.

Their team of five is small but powerful. Starting with the company president, who works in-office interacting directly with clients, it is clear to see the expertise and value in each member.

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

A Deep Understanding

Barnett Financial believes that getting to know you is the key to expert financial services. They know that financial decisions can sometimes be clouded by personal situations and beliefs.

They know that your financial goals are as unique as you are. For these reasons, before the topic of conversation turns to finances and asset allocation,

Barnett Financial takes the time to understand your life philosophy, your dreams, and your goals. Only when they have a real understanding of who they are serving can they provide the best possible financial advice.

Tailored Services

Barnett Financial does not have a patented system that is used for everyone. Instead, they choose to custom tailor services to each client, adding in details that are crucial for one client but removing them when they don't pertain to another.

Take a look at some of the following criteria which Barnett Financial looks at for each client individually:

- Goals and Objectives
- Cash Flow/Budgeting
- Retirement Planning
- Investment Analysis and Recommendations
- Employee Benefits

- Life and Disability Insurance Needs Analysis
- Income Tax
- Estate Planning
- Risk Management
- Education Funding
- Business Planning

A Registered Investment Advisor

Barnett Financial is a Registered Investment Advisor (RIA), which means on top of their fee-only approach, they are further obligated to provide unbiased financial advice to their clients. RIAs are also bound by the U.S. Investments Act of 1940. As you can see, they voluntarily hold themselves to some high standards, and it seems they wouldn't have it any other way.

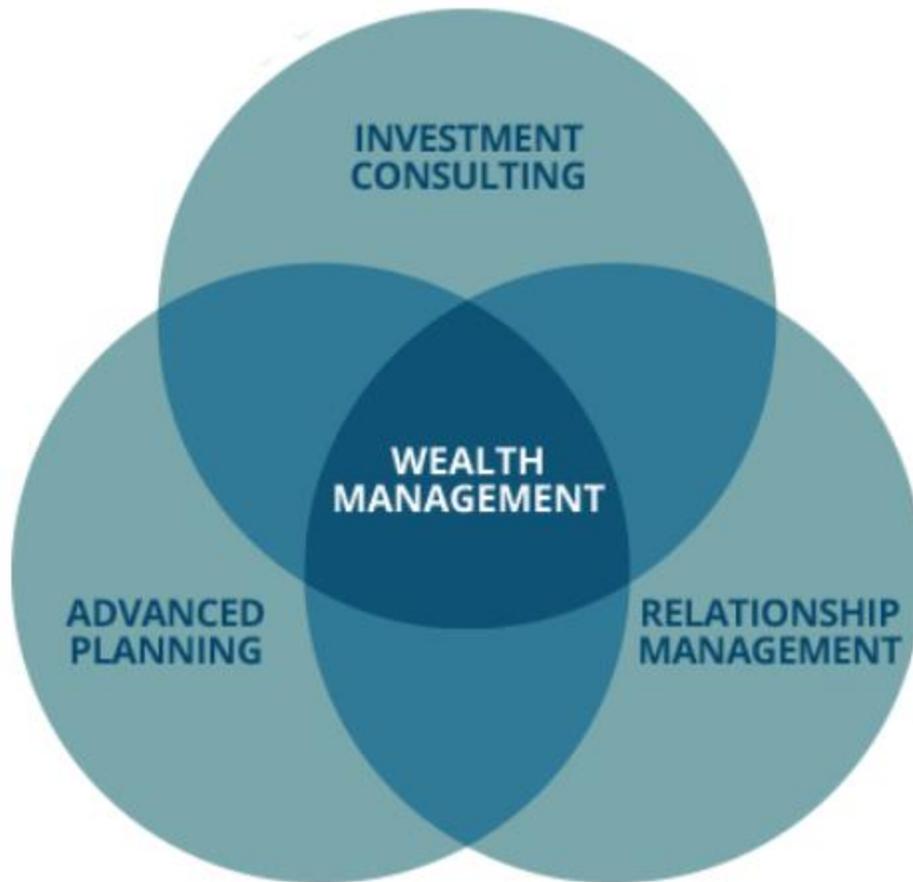
An Investment Boost

When working together with their clients to create the best possible investment approach, Barnett Financial has access to institutional share classes of stocks, which allows them to seek out funds with the lowest investment to return ratio. Additionally, they work hard to minimize your tax liability, which can sometimes take a big chunk out of your pocket if not handled correctly. If you will be looking to make investments as part of your financial plan, this can be a big asset.

Related: [Best Financial Advisors in Oklahoma City & Tulsa, Oklahoma](#)

Bell Wealth Management Review

As a family owned and operated Austin wealth management firm, [Bell Wealth Management](#) takes a disciplined approach to helping their clients manage their wealth and investment plans. Also, working with a select number of clients allows them to provide a level of service that can be hard to find these days.



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

Small Scale, Big Experience

Perhaps one of Austin's smallest financial advisory firm, Bell Wealth's team of four has an impressive combined resume, including a founder who has served as Deputy Treasurer for the city of Austin, a president who has run a successful Fortune 100 company, and an investment director who has managed over [\\$500 million in assets](#) working for the U.S. Trust.

This combined level of experience has given the team an advantage when it comes to handling your financial future.

A Medical Edge

Bell Wealth Management's experiences have given them the tools and knowledge they need to provide comprehensive financial services to medical professionals. Because they are closely tied to those in the medical community (three of their top advisors are married to women who are successful doctors), they know that you have invested a great amount of time, money, and effort to make sure you and your family are living a comfortable, prosperous life.

When the time comes to look at your financial future, you can trust that Bell Wealth Management has custom-tailored services just for medical professionals.

No-Cost Second Look

If you aren't sure that your current portfolio is working hard for you, let the team at Bell Wealth give you a no-cost second opinion.

Keeping in stride with their desire to look out for the best interest of their clients, they will evaluate your current plan free of charge, making sure you are at the top of your financial game.

Not many financial advisors in Austin are willing to do that.

Partnering Up

In addition to the expertise offered in-house at Bell Wealth, they have long-standing ties with several partnering firms such as Charles Schwab,

Vanguard, and the CFA Institute. These carefully crafted relationships only strengthen the knowledge and expertise provided by your team of financial advisors.

Briaud Financial Advisors Review

One of the leading firms of registered investment advisors in Austin, [Briaud Financial Advisors](#) provides comprehensive services including investment and advisory options for not only local high net worth families and individuals, but also to clients across the U.S.

Founded [30 years ago](#), as with the other names on this list of the best financial advisors in Austin, Briaud is a fee-only firm.

General services available to clients of Briaud, a leading financial adviser in Austin, include family office services, financial planning, investment management and trust services. All of these services are delivered with the primary objective of putting client interests first.

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

Objective Advice

For many clients looking for an Austin financial adviser, one of the most important considerations is a sense of objectivity in the services provided by that adviser. This is an area where Briaud and the other names on this ranking of the best Austin wealth managers excel.

Briaud works with clients to deliver personalized, unbiased advice because they adhere to fiduciary standards.

This means they put clients' best interests ahead of everything else, and Briaud has been fee-only since 1986. This means they have never accepted any commissions, and this is a big reason they're considered a top Austin wealth manager firm.

Exclusivity

Along with the provision of unbiased, objective advice, Briaud, a top wealth management firm in Austin, also specializes in service that is personalized and exclusive.

Briaud only works with a limited number of select clients, and each Certified Financial Planner that works for this Austin financial advisor can focus on the needs of a very small group of individuals or clients.

This allows Briaud's team of Austin financial advisers to focus on even the smallest details that ensure their clients are able to maximize their current wealth and build it for the future. Briaud doesn't strive to take an approach requiring them to be a high volume business, which is something many clients appreciate about this wealth management firm in Austin.

A Friendly Approach

Finally, there tends to be a misconception about financial advisors. Many people feel as if a financial advisor is someone who is going to be cold and impersonal in how they deliver service.

Briaud strives to break out of this mold and instead deliver services with a warm, friendly touch, instead of being cold or impersonal. Their approach is built on the concept of building long-term relationships gradually, and having conversations rather than sending over formal written content for clients to review.

It's this quest for a warm and personal experience that has led Briaud to remain one of the top firms of Austin financial advisers.

Popular Article: [**Best Financial Advisors in Philadelphia, PA**](#)

Durbin Bennett Private Wealth Management Review

[Durbin Bennett](#) is a private wealth management and tax advisory firm located in Austin. The mission statement of this leading firm of Austin wealth managers is to provide clients with confidence through the provision of clear, simple solutions that address complicated financial situations.

Some of the more specific areas of service offered by Durbin Bennett, a top financial adviser in Austin, include asset and risk management, business transaction planning, generational wealth transfer, estate and income tax planning, retirement planning, family office coordination and family education.

Key Factors that Enabled This Firm to Rank as a Top 2017 Wealth Management Firm in Austin

Recognition

AdvisoryHQ isn't the only media outlet or organization to recognize Durbin Bennett as not just a top team of Austin wealth managers, but a [top firm in the country](#).

For example, in 2015 Bloomberg ranked this Austin financial advisor firm as one of the Top 50 Registered Investment Advisers. CNBC named this team of Austin managers as coming the top 100 Fee-Only Wealth Managers.

The Financial Times also ranked Durbin Bennett as one of the Top Financial Advisers of 2015.

Professional Organization Affiliation

Durbin Bennett is a firm that has a long history as being one of the top financial advisors in Austin for many years, and the majority of the professionals who work for this Austin wealth manager firm are associated with some of the industry's top organizations and professional groups.

For example, founding partner Richard B. Bennett is a Certified Financial Planner practitioner, and he also holds other credentials such as being a Certified Public Accountant with a Personal Financial Specialist credential.

Like many of the other team members who work for Durbin Bennett, Richard B. Bennett is a member of the American Institute of Certified Public Accountants, the Texas Society of Public Accountants, the Estate Planning Council of Central Texas, and the International Board of Certified Financial Planners.

Wide Scope of Services

As mentioned in the introduction to Durbin Bennett, one of the top firms of Austin financial advisers, there are many services offered by this company, and a wide scope of services was important in the process to rank the best financial advisers in Austin.

Along with looking for fee-only financial advisers in Austin, a full breadth of services was at the top of the list to determine the top-ranking firms.

Durbin Bennett really excels in this area, and they serve the needs of a range of high net worth families and individuals as well as entrepreneurs.

Their services are aimed at not just topics such as investment and portfolio planning and management, but they can also help businesses with complex

situations, and they can help coordinate family offices. Durbin Bennett also provides financial education services, particularly relevant to newly wealthy individuals and families.

ML&R Wealth Management LLC Review

A top fee-only team of registered investment advisors in Austin, [ML&R Wealth Management LLC](#) strives to bring transparency to financial planning and management on behalf of their clients. ML&R approaches their work with the idea that clients have unique needs, and they need tailored services that are based on those specific needs.

ML&R includes a large team of Austin financial advisers, including several wealth management partners who include Steve Harvey, Stuart Vic Smith, and Fred Frey. In addition to wealth management partners, the team of this best Austin wealth manager includes many wealth management advisors and associates.

Key Factors that Enabled This Firm to Rank as a Top 2017 Austin Financial Advisor Firm

The Fiduciary Standard

ML&R, one of the top financial advisors in Austin, adheres to something called the Fiduciary Standard, which means all guidance and advice they offer to clients is based on the highest of ethical standards, and as with the other names on this list of Austin financial advisers, is in the best interest of the client.

ML&R doesn't receive revenue from third parties that could lead to a conflict of interest with clients, including commissions.

Also, ML&R, one of the leading Austin wealth managers, strives to advise their clients in the ways they would advise themselves.

Holistic Approach

ML&R, one of the best financial advisors in Austin, bases their investment and advisement philosophy on an approach that values evidence over emotion. Their investment philosophy also considers academic research instead of having opinions based on financial news cycles.

The ultimate goal with this approach is that clients receive the best possible returns from the market, based on diversification, low costs and appropriate levels of risk.

Also, ML&R utilizes a holistic approach that incorporates not just investment advice but also takes into consideration all elements of a client's entire financial life.

Women

ML&R, one of the top registered investment advisors in Austin and a leading firm of Austin wealth managers, serves a unique group of clients, and one such group is women.

ML&R highlights their focus on working with women and taking the time to understand their unique goals. There is a belief at ML&R that often women who come to them are going through a transition in their lives, and they want to create a balance between their current income requirements and long-term appreciation.

Business Owners and Company 401(k) Plans

Two other groups served by ML&R, one of the leading Austin financial advisers, are business owners and company 401(k) plans.

In terms of business owners, this top Austin wealth manager works to understand the unique challenges of business ownership. Specifically, clients come to ML&R for succession planning which will allow clients to meet their long-term goals.

ML&R, one of the best financial advisors in Austin, also works to be a single point of contact for 401(k) plan sponsors, coordinating other plan service providers.

ML&R creates 401(k) plans that use institutional investments used by pension funds and high net worth clients.

Read More: [Best Financial Advisors in Cincinnati, Ohio](#)

Pauley Financial Review

[Pauley Financial](#) is a fee-only financial planning and investment management firm with three locations in Austin, Dallas/Fort Worth, and San Antonio. If you're looking for a top financial advisor in Texas, Pauley Financial presents you with a few convenient choices. This can be especially helpful if you travel a lot and need to drop in for any reason.

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

Engaging Leadership Team

The leadership team at Pauley Financial consists of [three principals and two directors](#). They bring a range of educational backgrounds, career experience, and personalities, creating a truly dynamic leadership team.

The professional background of each advisor is [described in detail](#), highlighting their unique motivations and individual passions in the field of financial advisement.

The result is a personable, approachable, and fully motivated team. It also provides a unique opportunity for clients and prospective clients to get to know their financial advisor before even stepping through the front door.

As financial advisors, they don't want to simply take your money and make decisions with it.

Instead, the advisors at Pauley Financial want you to learn about the process, understand your options, make informed decisions, and create a partnership that is equal parts engaging and fulfilling.

Six Tenets of Services

Pauley Financial abides by [six tenets](#) of services, creating an organizational framework that keeps clients and advisors motivated, on task, and poised to accomplish financial goals. These tenets include:

- Organization
- Accountability/Discipline
- Objectivity
- Pro-Activity
- Education
- Partnership

Financial Services for Independent Women

Pauley Financial believes that independent women have distinct financial realities.

With longer life spans and a greater likelihood of taking a break from the workforce to care for family responsibilities, independent women have unique financial needs.

Pauley Financial is fully prepared to address any financial questions that women may have, regardless of their marital status. The firm wants their clients to be empowered through financial independence, and can custom-tailor their services to a woman's needs.

For women who are unsure as to how they fit in with these services, Pauley Financial provides [case studies](#) of past clients. These case studies discuss financial complications of divorce, second marriages, saving for retirement, the loss of a spouse, and more.

Richard P. Slaughter Associates Review

[Richard P. Slaughter Associates](#) is an independent, fee-only financial planning and wealth management firm in Austin, also with a presence in Dallas. Richard P. Slaughter Associates holds the distinction of being the first fee-only wealth management firms in the country. This comprehensive team of financial advisors in Austin provides in-depth solutions for individuals and families.

The firm was founded in Austin [in 1991](#), and as with the other names on this ranking of the top Austin financial advisers, as a fee-based firm, Richard P. Slaughter and Associates is able to work with a focus on the best interests of the client, without the potential for conflicts of interest that can come from commission-based advisors and firms.

Key Factors that Enabled This Firm to Rank as a Top 2017 Wealth Management Firm in Austin

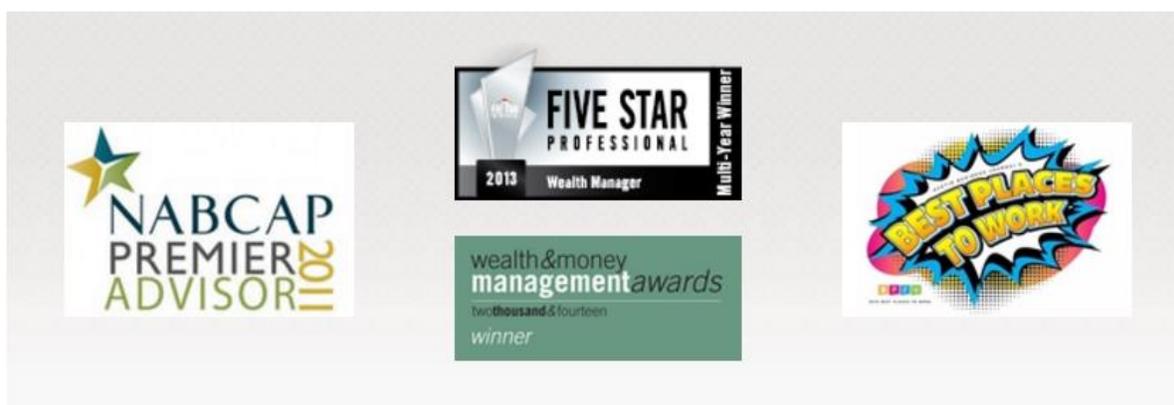
Awards and Recognition

Much like many of the other names on this ranking of the best financial advisors in Austin and the leading registered investment advisors in Austin, the Richard P. Slaughter firm has won many awards and consistently been recognized over the years.

For example, this top Austin wealth manager firm has been named by Texas Monthly as a Five Star Wealth Manager for six consecutive years, and every member of the executive team has also been honored.

Slaughter Associates is also an NABCAP Premier Advisor, which recognizes those firms that uphold the utmost in business standards, financial management capabilities, and are dedicated to transparency in financial services.

These are just a few of the many awards this Austin financial advisor firm has recently received.



RPS Retirement Plan Advisors

One of the unique areas of service offered by this pick for one of the best financial advisors in Austin is called RPS Retirement Plan Advisors. This Austin financial advisor firm launched this area of business in 2010 as a way to provide 401(k) services and investment choices for these clients that are on-par with what's available to high net worth clients.

RPS, a top financial adviser in Austin, is a 3(38) fiduciary plan advisor that helps employees to retire on time and with security, while also relieving them of fiduciary duties that come with company plan sponsors.

There are a limited number of advisors with the ability to assume fiduciary responsibilities in terms of 401(k) management and advisement, and to do so, firms must provide services without commissions.

Wealth Source

One of the unique elements of the approach and philosophy at Slaughter Associates, one of the leading firms of Austin financial advisors, is the fact that they understand the importance of wealth source.

What this means is that the approach and philosophy at Slaughter are based on the fact that not all wealthy individuals are the same. There are unique needs not only among individuals but also within families, and much of the distinction comes from the differences in the source of wealth of the individual.

Slaughter, a top wealth advisory company in Austin, focuses on helping business owners, business professionals and the suddenly wealthy because they are groups with very specific and unique financial needs and requirements.

Related: [Best Financial Advisors in Charlotte, North Carolina](#)

WorthPointe Review

One of the best financial advisors and a leading wealth advisory company in Austin, [WorthPointe](#) bases their business and services on the concept of

relationships. Their goal is to create long-term relationships and plans that are beneficial to their clients in every way.

What's interesting to note about WorthPointe, one of the top financial advisors and a leading Austin wealth manager firm, is the fact that all of their advisors are owners. This means they're completely accountable and a long-term part of the team at WorthPointe.

Key Factors that Enabled This Firm to Rank as a Top 2017 Austin Financial Advisor Firm

Investment Philosophy

One of the key ways many financial advisors in Austin and Austin wealth managers differentiate themselves from one another is through their investment philosophy.

The investment philosophy at WorthPointe, one of the leading financial advisors in Austin, includes the follow concepts:

- There is a belief that success is built on trust and confidence from clients. This means transparency is essential at WorthPointe.
- The approach undertaken by WorthPointe, one of the best financial advisors in Austin, is also based on diversification, low costs, and tax efficiencies. There are also three company factors associated with higher returns based on the WorthPointe investment philosophy. These company factors are size, price, and direct profitability.
- Finally, WorthPointe always works to help each client achieve their unique financial goals but also their personal goals, which is what sets them apart as a top financial adviser in Austin.

Comprehensive Advice

As has been mentioned throughout this ranking of the top Austin financial advisers and Austin wealth managers, extremely important in the ranking process was a broad range of services. This is important to clients when selecting registered investment advisers in Austin because people and families typically have complex financial needs and goals.

That means a successful Austin wealth manager needs to be able to adequately address the complexity of these needs and goals, and that is accomplished by having a wide variety of service offerings and extensive experience.

WorthPointe, one of the top Austin wealth managers, excels here. WorthPointe has a team of CFP® Professionals, so this means advisors can provide guidance in areas including:

- Estate planning
- Taxes
- Investments
- Asset protection
- Charitable giving

Fiduciaries

Another common theme that has been repeated throughout this ranking of the leading financial advisors in Austin is the importance of ranking Austin financial advisors who act as fiduciaries, and are independent of brokerages.

The team at WorthPointe acts as fiduciaries, and they are directly regulated by the Securities and Exchange Commission. This means not only are they structured as a fee-only firm, but they're also legally required to act in the best interests of their clients.

Conclusion: Top 9 Best Financial Advisors in Austin

With a plethora of information on the best financial advisors in Austin, Texas, what do you do next?

There are many good choices, but knowing how to pick the right one is key. There are a few things you can do to further guide you in the right direction for finding a top registered investment management firm or wealth manager in Austin.

First, you should create a list of your assets. This would include money you have coming in from your job, pensions, or other sources; real estate and other assets; and stocks and investments.

Compare this list with the top 9 financial advisors in Austin, and narrow down where you best fit. Most of our listed Austin-based RIAs, financial advisors

and wealth managers do not have a minimum dollar amount for your assets, but there are a couple that do.

Others don't state a minimum but do want you to know they cater to "high net worth clients."

Next, create a list of your financial goals. Where do you see yourself today? In five years? In 20? Is retirement your main concern, or is investing your money to grow your assets one of your main goals? Have you recently gained an inheritance or been through a divorce? Use these key points in matching yourself up with the best possible advisor.

Lastly, when you choose one, two, or three Austin financial advisory firms that interest you, make contact. Most are happy to answer any questions you have. Some are even willing to sit down with you and give you a no-cost review to show you what they can do for you.

Your financial future is bright, and with the help of the right financial advisor in Austin, TX, you can put your trust in someone who truly keeps your best interests in mind.

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