

Top 10 Best Financial Advisors in Indianapolis, Indiana

2016 RANKING OF TOP WEALTH ADVISORS

Finding the Top Financial Advisor in Indianapolis, Indiana

Searching for the best of something can be a tough undertaking. Searching for the best financial advisors and wealth managers in Indianapolis, Indiana, is no exception. If you find yourself here, you most likely need clarity in your finances and you know that the services of a financial advisor will help you to assess your situation and plan for a bright future.

Financial advisors in Indianapolis offer a wide range of services from basic financial management to retirement to more complex issues like estate planning and investment management, which involves mutual funds, stocks, and building a successful portfolio.

Do you know yet what exactly it is that you want? Are you thinking ahead to the future? Where is it leading you? As you search for the right Indianapolis-based financial advisor for you, you probably want to know that your future is safe and secure in their hands. We couldn't agree with you more.

Building trust through a relationship with your financial advisor is paramount. After all, you are entrusting someone with all of your life's hard work and, what's more, you are paying them to do so! With such high stakes, it's essential to do the appropriate research to weed out those financial advisors in Indianapolis, Indiana, who are more profit-driven than client-driven.

At AdvisoryHQ, we have done our best to make your journey as straightforward as possible. As you will see through this report, we diligently scrutinize each and every financial advisor in Indianapolis. We

apply our own methodology to narrow down a long list of firms to select the top-performing financial advisors in Indianapolis for your consideration.



AdvisoryHQ's List of the Best Financial Advisors in Indianapolis

- **Avalon Wealth Advisory**
- **Axia Advisory Corporation**
- **Bedel Financial Consulting, Inc.**
- **Castle Wealth Advisors, LLC**
- **Deerfield Financial Advisors, Inc.**
- **Halter Ferguson Financial, Inc.**
- **Market Street Wealth Management Advisors, LLC**
- **Ronald Blue & Company**
- **Wallington Asset Management, LLC**
- **Worley Erhart-Graves Financial Advisors**

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

Top 10 Best Financial Advisors in Indianapolis, Indiana

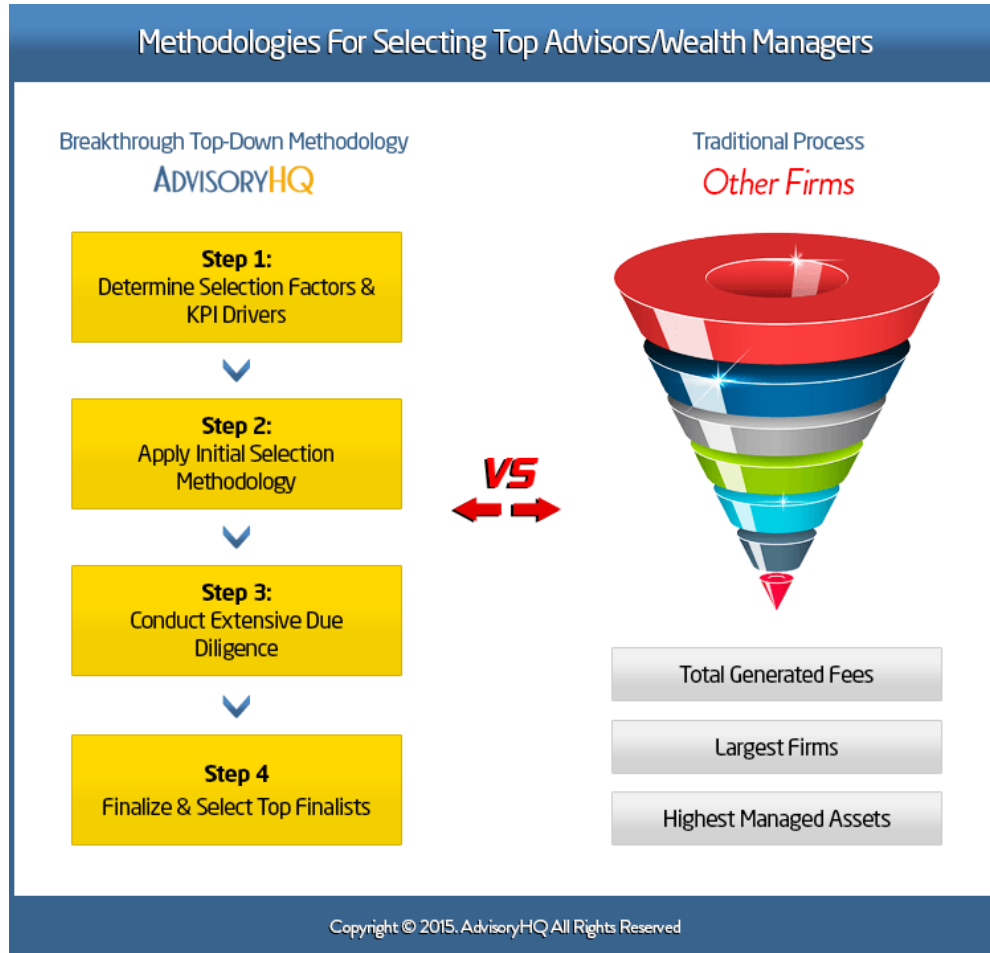
Firm	Location
Avalon Wealth Advisory	Indianapolis
Axia Advisory Corporation	Indianapolis
Bedel Financial Consulting, Inc.	Indianapolis
Castle Wealth Advisors, LLC	Indianapolis
Deerfield Financial Advisors, Inc.	Indianapolis
Halter Ferguson Financial, Inc.	Indianapolis
Market Street Wealth Management Advisors, LLC	Indianapolis
Ronald Blue & Co.	Indianapolis
Wallington Asset Management, LLC	Indianapolis
Worley Erhart-Graves Financial Advisors	Indianapolis

Methodology | Financial Advisors – Indianapolis

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

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

We then applied AdvisoryHQ's Breakthrough Selection Methodology to identify the final list of top advisors that provide services in and around Indianapolis.



Detailed Review – Top Ranking Financial Advisors in Indianapolis

Below you will find comprehensive information on each financial advisor in Indianapolis that ranked in the top 10 on our list of top advisors and financial planners in Indianapolis.

Avalon Wealth Advisory Review

[Avalon Wealth Advisory](#) is a Registered Investment Advisor (RIA) located not far off I-69 in Indianapolis. They offer comprehensive financial planning and investment management services to a wide variety of affluent clients including individuals, families, business owners, corporate executives, physicians, and more.

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

Listed below are key factors that allowed Avalon Wealth Advisory to rank as one of 2016's top 10 financial advisory firms in Indianapolis, Indiana.

A Team Approach:

In order to best fulfill your financial needs, Avalon Advisory coordinates with all of your financial professionals, such as your legal, accounting, and banking advisors, in order to offer a comprehensive, fluid plan.

A Fee-Only Advisor:

Interested only in the goals of their clients, Avalon Advisory chooses to operate as a fee-only firm and seeks to offer unbiased advice that is free from conflict of interest with any other organization or individual. 100% of the revenue received by your financial advisor is explained up front and clearly outlined for you. There are no hidden fees, and each plan is custom tailored to fit your needs.

Your Builders:

The strength and expertise of the team at Avalon Advisory stands out through each member. Together, they have over a century of experience in leading their clients to their financial goals.

Additionally, each and every financial advisor on the team has been certified as a CERTIFIED FINANCIAL PLANNER (CFP), further exemplifying their dedication to doing their best for their clients.

The Building Process:

Avalon Advisory takes a bit of a different approach to building a comprehensive plan. They liken it to constructing a building and take

their metaphors seriously, starting with a blueprint and working hard to build a sound structure. Here's how they guide you in creating the best plan for you:

- Initial Meeting: Whether you are just testing the waters or ready to cannonball right into the pool, Avalon Advisory offers a series of 1-3 initial meetings at no cost and no obligation to you. These meetings help both parties identify expectations and create an assessment of your needs.
- Financial Blueprint: During this stage, all efforts are focused on your financial future for the next 3-5 years. Your financial advisor will develop the goals and objectives discussed during the initial meetings and determine a starting point for your assets, liabilities, income and expenses, investments, wills and trusts, insurance, and more.
- The Building Phase: When a clear picture has been established, it's time for the implementation of your financial plan. Your financial advisor will coordinate efforts with Certified Public Accountants (CPAs), Estate Planning Counselors (EPCs), risk management professionals, and more, in order to take your blueprint from a plan to a tangible structure.
- Monitoring and Updating: The monitoring and updating of your plan is a continuous effort. Changes and adaptations are made to your plan as the market and your life changes. New opportunities are continuously presented to you for consideration.

Axia Advisory Corporation Review

If independence can be considered a credential, [Axia Advisory Corporation](#) considers it their most important one. They understand the value of impartiality and always act independently with no third-party entities clouding their judgment.

They offer retirement planning and investment services to a select group of plan sponsors, but they also offer individualized financial services that are worth looking into.

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

Below are key factors that enabled Axia Advisory Corporation to be rated as one of 2016's top 10 financial advisory firms in Indianapolis.

Retirement Plan Consulting:

Axia Advisory has a full-range of advisory services aimed at organizations and plan sponsors. As a fiduciary, they take their role seriously and can get you retirement ready. Services offered include:

- Fiduciary governance
- Plan design review
- Investment consulting
- QDIA consulting
- Provider management and search capabilities
- Participant education

Investment Management Consulting:

When handling your investments, Axia Advisory believes that asset allocation is the primary determinant of long-term returns. Risk control follows right behind and is of prime importance. With the ever-changing economy, Axia Advisory has seen a thing or two, and they know just how to handle what the market throws at them. Here's what to expect in terms of investment services:

- Investment consulting
- Discretionary investment management
- Custom investment products
- Target-date strategies

Private Wealth Management Services:

Making your life simpler is a primary goal for your financial advisor. Understanding your current situation and clearly outlining goals and objectives is key. To meet the individualized needs of private clients, Axia Advisory offers portfolio management and financial planning services that utilize the same process employed by institutional clients, opening the doors for you to take advantage of great services.

Keeping Up with the Market:

Knowledge is definitely power. In order to keep you on the cutting edge of all things related to your finances and the market, Axia Advisory publishes a quarterly Market Commentary (published on their website) that covers a variety of topics. They also publish a number of white papers (concise reports that break down complex financial issues), newsletters, and their own blog. With an endless stream of professional insight, staying atop your financial game should be much easier.

Bedel Financial Consulting, Inc. Review

Established in 1989 by Elaine Bedel, [Bedel Financial Consulting, Inc.](#) is one of the leading female-owned Registered Investment Advisors (RIAs) in the country. They offer financial planning and investment management services to both individuals and institutional clients.

With over \$1 billion in actively managed assets and 18 employees supporting their clients, Bedel Financial is ready to help you meet your financial goals.

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 Bedel Financial Consulting, Inc. to rank as one of 2016's top 10 financial advisory firms in Indianapolis, Indiana.

No-Obligation Consultation:

With a no-obligation consultation available for prospective clients, this is a fantastic opportunity to discuss your goals and hear what the team at Bedel Financial can do for you. A consultation includes an assessment of your current financial situation and where you want to go from there. They also include a discussion of plans and strategies, financial projections, and a list of action items that reflect your tentative plan.

The Bedel Barometer:

Bedel Financial has curated a neat little tool that is updated regularly and takes into account key areas that have historically been indicators of the strength of the U.S. economy. Since its beginning, the barometer has consistently maintained a positive score, which indicates that the economy is steadily moving towards growth.



Your Independent Advisor:

From day one, Bedel Financial has believed that standing as an independent, fee-only fiduciary was the only way to do business. After all, how can you get good advice when communication is stifled by third-party commissions and things that are far from your best interest? You can rest easy knowing that doing what's best for you is Bedel Financial's only interest.

Personal Services:

As an individual, you will be partnered with the Bedel Financial Consulting team, and they'll help you understand and plan for your future. Here's a look at services offered to individual clients:

- Comprehensive Wealth Management: This approach combines financial planning and investment management services into one comprehensive plan, and Bedel Financial believes this is the best way to manage and grow your assets.

- Retirement Focus Plan: Bedel Financial offers a toolbox of services that focuses on analyzing your ability to retire and implementing processes that ensure your success. They abide by a “RetireSecureStrategy” and also offer an additional layer of protection through insurance services.

Young Wealth Accumulators: It’s never too early to focus on being smart with your money. In fact, 20-40 year olds can benefit tremendously from establishing a solid financial foundation that will carry over into each phase of their lives. This service is dubbed “Generation NeXt” and is designed to guide a younger generation onto an affluent path.

Institutional Services:

As a fiduciary partner with their clients, Bedel Financial offers institutional services including the following:

- Retirement Plan Consulting: A trustee of a company retirement plan faces a lot of responsibility. Bedel Financial’s comprehensive process alleviates much of that responsibility and allows you to focus on making the best financial decisions possible.
- Financial Education: Employees that are educated about and understand their company retirement plans are more apt to make smart financial decisions that brighten the overall picture. For this reason, Bedel Financial offers short- and long-term education with an unmatched level of professionalism.
- Investing: Ultimately, the investments you make are what grow your assets and allow you the financial freedom to pursue your goals. Bedel Financial offers short- and long-term investment planning that utilizes no-load mutual funds, EFTs, separately managed accounts, and more.

Castle Wealth Advisors, LLC Review

Castle Wealth Advisors, LLC is a comprehensive financial advisor that operates three separately managed companies. They are Castle Financial Group, Castle Investment Advisors, and Castle Valuation Group.

While they are headquartered in Indianapolis, Indiana, they serve clients in more than 45 states. Services are tailored to families and business owners with at least \$2 million in investable assets.

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

Below are key factors that enabled Castle Wealth Advisors, LLC to rank as one of 2016's top 10 financial advisory firms in Indianapolis.

The Fee-Only Choice:

In 1973, when Castle Financial Group originated (before they became Castle Wealth Advisory), they were one of the first fee-only advisors in the Midwest. A lot has changed in finance over the decades, but Castle Wealth's commitment to being an independent fiduciary, always invested in their clients, hasn't.

A Family Office Concept:

Using modern technology, family office services stand to encompass all of your financial needs by only having to hire one organization. Castle Wealth can advise you in regards to gifting, estate planning, investment management, and more.

Business Succession Planning:

Each separate entity of Castle Wealth Advisors works to help business owners achieve optimal success in selling or passing on a business. Services include but are not limited to:

- Business valuation
- Developing a plan of succession within or outside the family
- Minimizing income taxes
- Reviewing documents with your attorney
- Preparing a detailed transition report
- Estimating retirement income

Triple Power:

So, just why would a company split into threes? To give you a better idea of what makes each branch of Castle Advisors its own unique entity, let's take a look at all three:

- Castle Financial Group: This is the oldest member of their family of companies. They consider themselves the “architect” of the group that designs financial blueprints to serve and protect clients and their assets. They deal with taxes, gifting, estates, business succession, and retirement.
 - Castle Investment Group: This branch is an SEC-registered investment advisory firm, and they take care of your personal assets, charitable trusts, pensions, retirement assets, and family foundations. They also combine a variety of stock options to help you invest wisely and grow your wealth.
 - Castle Valuation Group: Preparing business valuations for closely-held companies is the main goal of this entity. They handle both public and private companies through a thoughtful and organized approach.
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Deerfield Financial Advisors, Inc. Review

With over 28 years of experience, [Deerfield Financial Advisors, Inc.](#) offers customized financial planning services for well-established individuals, families, business owners, and entrepreneurs.

Deerfield Advisors is a Registered Investment Advisor (RIA), and they believe in a fee-only approach, which allows them the freedom to focus solely on your needs. They serve clients through two offices, one in Indianapolis, Indiana, and another in Park Ridge, Illinois.

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 Deerfield Financial Advisors, Inc. to rank as one of 2016’s top 10 financial advisory firms in Indianapolis, Indiana.

The Deerfield Approach:

Before getting to work and getting their hands dirty, Deerfield Advisors have taken the time to create a value-driven approach to their business.

The following is an overview of what this means for you:

- Experience: With a richly diverse team and over 25 years of real-world experience, Deerfield Advisors strive to offer you the experience and expertise you deserve.
- Independence: The only person who really matters is you. As an RIA, Deerfield Advisors doesn't do business with any brokerage firms, banks, or insurance companies, and therefore, there is no overhead company that influences their advice.
- Relationship: Deerfield Advisors say they feel a strong sense of responsibility when it comes to their clients. Through ongoing interaction and communication, they are able to help you reach your goals and find solutions to your problems in this ever-changing economy.

Clarity: Regardless of how simple or complicated an issue may seem, Deerfield Advisors want to deliver transparent, straightforward, and easy-to-understand advice without all the usual, distracting financial jargon.

The Deerfield Planning Process:

Financial services through Deerfield Advisors have been expertly refined over many years to bring you an organized and unique approach which brings out the best in your family's legacy.

The first step is a complimentary meeting which allows your financial advisor to learn more about you and give you the opportunity to learn more about your advisor and the services that can help you manage your wealth.

While no two clients are alike, here's a look at a typical first year with Deerfield Financial:



Awards and Achievements:

Over the years, the team at Deerfield Financial has been on the receiving end of a variety of awards and acknowledgements. This should serve as a reflection to the cutting-edge practices of the firm as well as the dedication and expertise of their team. The following is a sampling of some of these achievements:

- 5 Star Wealth Managers, *Chicago* magazine 2014
- 5 Star Wealth Managers, *Indianapolis Monthly* magazine 2014
- Largest Financial Planning Firm, *IBJ* 2015
- “30 Most Influential,” NAPFA 2013

Halter Ferguson Financial, Inc. Review

“Independent. Experienced. Thoughtful.” Those are the three words [Halter Ferguson Financial, Inc.](#) uses to describe who they are. Since 1986, they’ve been serving clients with sound financial planning and investment management services.

Halter Ferguson is an independent, fee-only Registered Investment Advisor (RIA) that will take the time to listen to your personal goals and your financial needs. No middle-man or commission to stand in the way.

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

Below are key factors that enable Halter Ferguson Financial, Inc. to rank as a top 2016 wealth management firm in Indianapolis.

The Halter Ferguson Process:

Don’t fall victim to the mishmash of financial services perpetuated by big box advisors, the internet, and TV. These one-size-fits-all concepts do nothing for you and can leave you terrified that you are doing it all wrong. Relax. The team at Halter Ferguson will take the time to listen to YOU. They want to understand your goals and listen to your needs before they take any action with your finances.

Halter Ferguson wants you to only take on the services you truly need. They want you to have an organized understanding of how your money is working for you. Finally, they want to make the process simple.

Financial Planning Services:

Your financial plan will be custom tailored based on both quantitative and qualitative information. This will establish the groundwork for the future, but it is merely a starting point. A good financial plan will be flexible, ongoing, and reviewed periodically to reflect personal and economic changes. Planning services include:

- Investments
- Retirement
- College funding
- Income taxes
- Estate planning
- Insurance

- Employee benefits

Investment Management:

Each and every investor who comes to Halter Ferguson has their own unique set of goals and risk tolerances. Halter Ferguson believes that the key to successful investing is being comfortable with the level of risk taken. Your own risk tolerance will be assessed and monitored and for the sake of prudent diversification, a portion of your investments are always held outside of the stock market.

A Small but Mighty Team:

The team at Halter Ferguson is small, but they have a wealth of expertise to offer their clients. With only six individuals in the office, they each hold a Certified Financial Planner (CFP) designation, which is certainly not easy to achieve. They also have a variety of expertise such as founder Scott Ferguson's history of serving as President of the Financial Planning Association of Greater Indianapolis and Cris Halter's experience as President of the Network of Women in Business.

Market Street Wealth Management Advisors, LLC Review

Market Street Wealth Management Advisors, LLC is an SEC Registered Investment Advisor (RIA) that serves business owners with at least \$250,000 in investable assets.

Their Indianapolis-based office serves clients throughout the area and in at least 12 other states. Services include comprehensive financial planning, customized investment portfolio strategies, and retirement plan consulting services.

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

Below are key factors that enabled Market Street Wealth Management Advisors, LLC to be rated as one of 2016's top 10 financial advisory firms in Indianapolis, Indiana.

To Stand Independent:

As an SEC Registered Investment Advisor (RIA), Market Street Wealth stands by you as your trusted, independent fiduciary at all times. They have absolutely no products to sell. For qualified retirement plans, they co-sign as a fiduciary to your plan.

The Market Street Difference:

There are many things that can differentiate one firm from another. Each has its own unique set of values and practices that they believe help them make the best decisions for their clients. Below are some of the key factors that Market Street Wealth believes set them apart from their competition:

- Annual updates to your plan at no additional cost
- Integration and management of the clients' employers' retirement plans
- A focus on tax efficiency during all phases of planning
- Customized investment strategies for each individual client based on their specific needs
- Signing on as a co-fiduciary with the business owner for a qualified retirement plan

Managing All Facets of Your Wealth:

As a business owner, you have access to both financial planning and integrated investment management services. Your financial plan will include a probability assessment of your financial goals and all plans are updated annually at no additional charge.

When approaching your investment portfolio, Market Street Wealth seeks to optimize your investment portfolio's design to maximize the likelihood of reaching your financial goals. During all phases of managing your investments, there is a focus on tax efficiency.

The following is an example of the wealth management services available to you:

- Social security optimization
- Educational planning
- Investment portfolio management
- Retirement planning
- Debt analysis
- Life insurance adequacy analysis
- Disability income planning
- Long-term care planning
- Review of estate planning documents
- IRA and qualified plan distribution planning
- Roth IRA conversion analysis
- Gifting and charitable gift planning
- Stock option strategies
- Financial planning for dependents with special needs
- Divorce settlement planning
- Inherited wealth planning

Retirement Planning and Consulting Services:

Being the person responsible for your company's retirement plan is a big undertaking. Luckily, Market Street Wealth can offer expert advice and stand with you as co-fiduciary for your plan. Their goal is to optimize the design objectives of your plan. Through the use of independent Third Party Administrators (TPAs), they put an emphasis on representation from a variety of asset classes and fund families.

Your plan is continually monitored for performance and recommendations are made as needed. Furthermore, employee education is key for overall success and Market Street Wealth covers this as well.

Ronald Blue & Company Review

Ronald Blue & Company serves clients through four distinct divisions in 13 offices around the country, including one in Indianapolis, Indiana. They have clients in almost all 50 states. Ronald Blue offers financial planning, investment management, and estate planning services to clients across the wealth spectrum with no asset minimum.

For over 35 years, Ronald Blue & Company has taken a more uncommon approach to wealth management through the integration of biblical wisdom in all they do.

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

Below are key factors that enabled Ronald Blue & Company to be rated one of this year's top 10 financial advisory firms in the greater Indianapolis area.

The Ronald Blue Distinct Advantage:

Knowing that everyone is different is only part of the solution. Ronald Blue has taken it a step further and created four distinct divisions that offer access to specialized advisors who are experts in their niche. Below, we will discuss each division so that you can choose the one that best fits you:

- Private Wealth: This group offers comprehensive planning services to clients with an investable net-worth starting around \$1 million. This is the largest division in the firm.
- The Family Office: Focusing on the complex needs of multiple generations, the Family Office division encompasses your family's mission and governs sophisticated trust and estate plans. Net-worth minimums usually start around \$25 million.
- Professional Athlete: This division understands the unique set of challenges and requirements of professional athletes. Building and retaining wealth in a short career span is the main focus of this division. It includes cash flow management, estate planning, investment management, tax planning, risk management, and more.
- Everyday Steward: The Everyday Steward division focuses on clients who are just starting on their financial journey and services include everything from cash flow management to retirement. Clients in this category will have a net-worth of up to \$1 million.

Your Financial Plan:

The choices you make reflect your values and priorities and they affect all areas of your life, including your finances. Ronald Blue's approach to your financial plan clarifies your decision-making process and focuses

on leaving a legacy of financial, social, and spiritual capital. Here's what you can expect:

- Short-term cash flow planning based on Ronald Blue's "five uses of money"
- Long-term retirement planning
- Philanthropic counsel
- Estate and trust planning
- Proactively minimizing debt
- Tax planning
- Education planning
- Insurance considerations
- Access to "BluePrint," a proprietary and multidisciplinary financial planning tool

Managing Your Investments:

The primary objective in your plan is not just meeting financial goals, but rather increasing the probability that your goals will be reached. Ronald Blue and his team do not compete against random benchmarks. They utilize a Principled Reasoning approach in all of their time-based portfolios. This approach stands on a foundation of:

- Environment: The principle of Uncertainty and Instability shows that economic environments are numerous and it's important to manage risk and reinforce the value of saving.
- Growth: The principle of Human Productivity, Leadership, and Governance allows insight into how and where growth will most likely appear.
- Valuation: The principle of Inherent Value allows Ronald Blue to analyze various asset types to build a disciplined portfolio.

Although they exclusively recommend external investment solutions, Ronald Blue never accepts commissions from any investment companies.

Institutional Services:

If you have a privately-held family business, a non-profit ministry, or a public company with regulation-driven responsibilities, you most likely face challenges that include growth, governance, people, and more.

Ronald Blue offers a variety of institutional services and will guide you through every step with the utmost fiduciary care. They offer:

- Business consulting services
- Institutional investment consulting
- Retirement plan consulting
- Employee financial planning advisory services

Wallington Asset Management, LLC Review

Celebrating over 25 years of wealth and investment management, [Wallington Asset Management, LLC](#) proudly serves high net-worth individuals, trusts and estates, foundations, corporations, and institutional clients.

Founded in 1988, they offer total wealth management services through their Indianapolis-based office, which include financial planning and investment management services.

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 Wallington Asset Management, LLC to rank as one of 2016's top 10 financial advisory firms in Indianapolis, Indiana.

Independence at the Forefront:

Wallington Asset is a Registered Investment Advisor (RIA) founded on the principle of putting their clients before profit and working to earn and maintain an essential element of trust.

Expert Leadership:

The team at Wallington Asset may be small (comprised of just seven professionals), but they have the expert knowledge and experience you need in order for a bright financial future. Among their credentials, you

will have the power of Certified Financial Planners (CFPs) and Chartered Financial Analysts (CFAs) on your side.

The Wallington Philosophy:

Each investment portfolio requires well-defined policies in order to produce long-term success. Wallington Asset's ultimate objective is to capture the unique financial goals of each client. Here, we will take a look at the facets of Wallington Wealth's company philosophy:

- Formulation: Working closely with their clients, Wallington Asset is able to take into account and establish critical factors such as risk, cash flow, return rates, and time horizons, while carefully listening to your needs and objectives.
- Common Stock: Through the employment of both value and growth stock philosophies, you have access to a blended investment approach that minimizes your overall risk. Wallington Asset likes to utilize underestimated stocks that have a high potential for return. Diversification is also important in preservation of capital.
- Fixed Income: High quality bonds and conservative maturity structures are the basis for Wallington Asset's four-phase approach to the management of fixed income portfolios. The four phases are income strategy, duration range, portfolio management, and continued monitoring.
- Reporting: Regardless if a client chooses to have assets deposited with a specific custodian or any member of the NYSE, Wallington Asset reports on an ongoing basis and continually monitors the performance of each portfolio individually. This allows for nearly instantaneous reaction to any necessary changes, whether they originate from changes in the market or changes in the client's personal life.

Firm Objectives:

Aside from the objectives mentioned above, Wallington Asset strives to offer superior investment management services specific to each client's needs and risk tolerances. They will honorably do whatever it takes to get you to where you want to be.

Worley Erhart-Graves Financial Advisors Review

Knowledge is your power. That's what the all-female team at [Worley Erhart-Graves Financial Advisors](#) wants you to always keep in mind. Their services are perfect for women and professionals at every stage of life from young professionals to those approaching retirement to retirees.

While Worley Financial is headquartered in Indianapolis, they serve clients all throughout Indiana, Illinois, Ohio, Texas, and Florida. As a client, you can take advantage of their financial planning, investment management, and tax planning services, but that's not all.

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

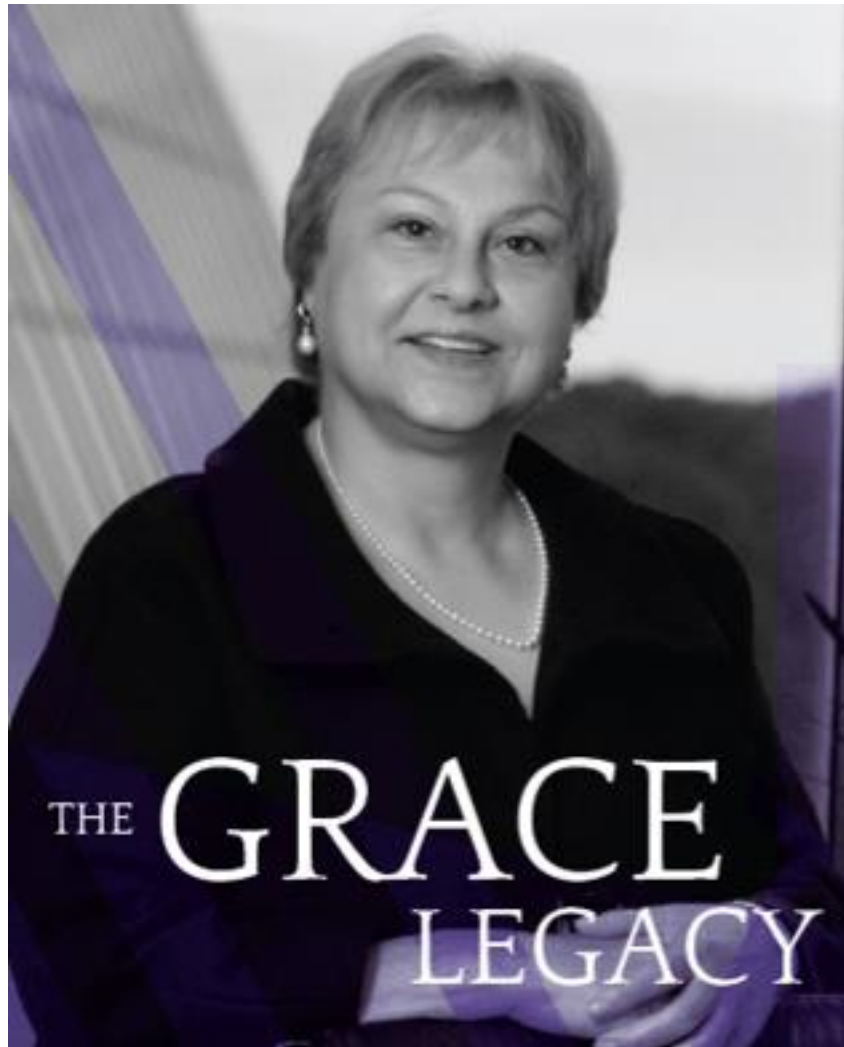
Below are key factors that enabled Worley Erhart-Graves Financial Advisors to be rated one of this year's top 10 financial advisory firms in Indianapolis, Indiana.

Fee-Only Financial Planning:

The team at Worley Financial always has and always will remain completely independent, and they adhere to the highest standard of excellence. Not only are they a Registered Investment Advisor (RIA), they operate on a fee-only basis and act as a fiduciary for their clients, always making recommendations with your best interest in mind.

The Grace Legacy:

Grace Worley, founder of Worley Financial, has created an impressive legacy since she graduated Indiana University in 1971. She began in insurance and continued to move up until she opened her own financial planning business named Worley-Mouzakis Advisory, Inc. in 1984. At the time, there were very few female professionals, but Grace continued to stand out and earned several awards and recognitions for her groundbreaking contributions to her craft.



Today, Grace is retired and enjoying the fruits of the advice she spent her life giving to others. The firm continues to use Grace's legacy in their operations today.

An Overview of Services:

As a client, you will have the freedom to build a completely customized portfolio that will grow and change with you over the years. The following is a sampling of what you can expect:

- Financial Planning: A comprehensive financial plan will take into account practical strategies and help you build a secure future. Your plan will take into account retirement planning, estate planning, investments, insurance, and more. Above all, Worley Financial is committed to providing you the knowledge you need to see the "big

picture” and understand how everything comes together for your benefit.

- Investment Services: When you choose Worley Financial to manage your investments, you don’t just get advice, you get a whole team dedicated to your success. Each customized portfolio is continually maintained, rebalanced as needed, and reviewed annually. Education is also a factor with investing, as your advisor wants you to be informed about your process.
- Retirement Planning: Retirement services are provided on an hourly, fee-only basis. Throughout the retirement planning process, you will have the opportunity to discuss income needs, establish savings/investments, and put in place a plan to help you see your retirement as an exciting time rather than a stressful one.
- Tax Services: Tax laws can be interpreted in many different way, and it all depends on the particular situation. Worley Financial has paired up with a Certified Personal Accountant and created Smithson Erhart-Graves Tax Advisors, LLC. You are not required to use any other financial services from Worley Financial in order to utilize their tax services.

Speaker’s Bureau:

Worley Financial offers qualified public speaking services for your professional association, community group, or social club. The team also develops and presents educational workshops for employees. General topics include, but are not limited to:

- Insurance planning
- General financial planning
- Estate planning
- Investing
- Tax planning
- Education funding
- Retirement planning
- Employee benefits

No-Cost Interview:

Think that Worley Financial may be right for you? Give them a call to set up a no-cost interview which will allow you to start the conversation about your financial future—without having to come out of pocket or face any further obligations if you decide not to hire an advisor.

Conclusion – Top 10 Financial Advisory Firms in Indianapolis, Indiana

Now that you have reviewed the top financial advisors in Indianapolis, Indiana, we hope that you feel hopeful and excited about what you will do next. Whether you have an idea of which provider will work best for you or are still on the fence, you have enough information to get on the road to a successful partnership with a financial advisor.

As you make your considerations, think about what you want to gain out of a relationship with your financial advisor. Are you looking for general direction? Have you gone through a major life change and feel like you don't know which direction you should go for? Do you need to plan for your retirement? Making a list of what you want will allow you to match those wants and needs up with the services of one of the top 10 financial advisors in Indianapolis.

Once you've chose one or two prospects, check to see if they offer a free consultation, whether by phone or in person. This is a great way to start a working relationship and get answers to questions related to your specific circumstances. Although the journey to financial freedom can seem at times intimidating, once you find the right Indianapolis financial advisor, you will feel much more at ease.

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