

# **Top 11 Financial Advisors in Phoenix and Scottsdale, Arizona**

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

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### **Finding the Top Financial Advisors in Phoenix and Scottsdale, Arizona**

Whether you have already entered retirement or are just starting out on the retirement journey, having a great wealth manager or financial planner by your side can be the difference between financial success and financial hardship. The question is: which are the best financial advisors in Phoenix?

The large number of financial advisors in Phoenix and the surrounding areas makes choosing just one a difficult task. However, by developing a clear idea of the advisory services you seek and doing proper research, the answers to finding the best financial advisory firms in Arizona will soon become clear.

While the final decision rests in your hands, AdvisoryHQ's research and selection team has compiled a list of the top financial advisors in Phoenix and Scottsdale, Arizona, to give you a jump start on your way to financial success.

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## **AdvisoryHQ's List of the Best Financial Advisors in Phoenix and Scottsdale, Arizona**

- [Alpha Fiduciary](#)
- [Bledsoe Asset Management, LLC](#)
- [Exeter Financial](#)
- [Heritage Advisors, LLC](#)
- [LifeTyme Financial, LLC](#)
- [Miller Russell Associates](#)
- [Perspective Financial Services](#)
- [Silverhawk Wealth Management](#)
- [Surevest Wealth Management](#)
- [Versant Capital Management, Inc.](#)
- [WealthTrust Arizona](#)

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

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## Top 11 Financial Advisors in Phoenix and Scottsdale, Arizona

Firm	Location
Alpha Fiduciary	Phoenix
Bledsoe Asset Management, LLC	Phoenix
Exeter Financial	Scottsdale
Heritage Advisors, LLC	Phoenix
LifeTyme Financial, LLC	Phoenix
Miller Russell Associates	Phoenix
Perspective Financial Services	Phoenix
Silverhawk Wealth Management	Scottsdale
Surevest Wealth Management	Phoenix
Versant Capital Management	Phoenix
WealthTrust Arizona	Scottsdale

### Methodology | Financial Advisors – Phoenix and Scottsdale, Arizona

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

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

We then applied AdvisoryHQ's [Breakthrough Selection Methodology](#) to identify the final list of top advisors that provide services to communities in and around Phoenix, Arizona.

## **Detailed Review – Top Phoenix Wealth Managers and Financial Planners**

Below, we present a more detailed overview of the best financial advisors in Phoenix and Scottsdale, including the many factors that allowed each Arizona wealth advisory firm to score so high in our selection ranking.

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### **Alpha Fiduciary Review**

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One of the top registered investment advisors in Phoenix, [Alpha Fiduciary](#) maintains a strong focus on the fiduciary duty due its clients. The firm provides investment guidance based on each client's financial goals and needs rather than any commission structures or selling agreements.

Alpha Fiduciary's experienced team holds a variety of industry-level credentials, including Accredited Investment Fiduciary (AIF®), Certified Financial Planner (CFP®), Chartered Alternative Investments Analyst (CAIA®), and Chartered Financial Analyst (CFA®).

Decades of combined experience and a commitment to keeping up with the ever-changing global markets make Alpha Fiduciary a top choice when it comes to registered investment advisory firms in Phoenix.

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

Below are key factors that enabled Alpha Fiduciary to rank as a top 2016 wealth advisory firm in Phoenix, AZ.

##### Integrated Wealth Management

Alpha Fiduciary believes that wealth management encompasses a spectrum of services, including investment consulting, advanced planning and relationship management. The firm helps its clients navigate the different stages of their financial lives with an integrated service that emphasizes support.

- Investment Consulting – Alpha uses its discovery process to form a clear picture of the client's current resources and future goals. It then builds a

portfolio based on each client's unique situation, tax needs, and risk appetite.

- Advanced Planning – The firm considers each client an individual with distinct needs, desires, and challenges. It is committed to helping its clients navigate their specific situations through research and experienced-based planning.
- Relationship Management – Alpha Fiduciary understands that communication is key to any long-term relationship. The Alpha team seeks to be readily available to its clients at all times.

Alpha's wealth management process is as follows:

- [Discovery meeting](#)
- [Define the engagement](#)
- [Investment plan meeting](#)
- [Follow up](#)
- [Regular process meetings](#)

During this process, Alpha Fiduciary works with its clients to create and execute a holistic wealth management approach.

### Defined Investment Strategies

Alpha Fiduciary has two defined investment strategies to fit the needs of its clients. The first is [Tactical Alpha Allocation Strategies](#), which is built using tactical asset class diversification, option structures and levered ETFs, forecast-based decision making, and tactical management.

Alpha's second strategy is called [Global Tactical Multi Asset Class Strategies](#). This strategy is built on the following principles: asset class diversification, open architecture, forecast-based decisions and tactical management. Allocations may include, but are not limited to:

- Domestic/international equity
- Emerging markets equity
- Domestic high-yield fixed income
- International fixed income
- Emerging markets fixed income
- Real estate
- Cash and cash alternatives

All of Alpha's investment strategies are created with diversification, opportunity, risk management, and liquidity in mind.

## Experienced Estate Planning

When it comes to estate planning, Alpha Fiduciary is dedicated to helping families and heirs prepare for the effects of wealth transfer. The firm believes that tax efficiency is only one facet to successful estate transfers—family dynamics play a large role as well and should be addressed as part of the planning process.

This holistic view makes Alpha an attractive choice for anyone who may one day be faced with the complexities of estate transfer.

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## **Bledsoe Asset Management Review**

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Based out of Phoenix, Arizona, [Bledsoe Asset Management](#) has been helping its clients achieve their financial goals since 2008. As a Registered Investment Advisor, the firm is bound by law to offer unbiased advice and put its clients' interests above all else. Bledsoe's mission is to help its clients live the lives they desire through the preservation and growth of their wealth.

The firm offers a variety of services including financial planning, portfolio management, estate planning, 401(k) investment advisory services, and financial education services. It stands by its values of integrity, objectivity, transparency, and service.

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

Below are key factors that enabled Bledsoe Asset Management to rank as one of 2016's top registered investment advisors in Arizona.

#### Time-Tested Investment Philosophy

Bledsoe Asset Management's investment philosophy is based on five time-tested elements: investment horizon, risk and return, asset allocation, rebalancing, and the minimization of costs and taxes.

- Investment Horizon – Planning and acting for the long-term is a vital aspect of successful investing.

- Risk & Return – Bledsoe crafts careful plans that achieve optimal balances between risk and return.
- Asset Allocation – The firm creates a customized allocation strategy for each client based on the client’s individual needs and goals. Allocation is spread across multiple investment options, including equities, fixed income, and alternative investments, in order to reduce risk and maximize gain.
- Rebalancing – Bledsoe Asset Management rebalances its portfolios based on the latest market information, thus keeping its clients’ investment strategies current and up-to-date.
- Minimization of Costs and Taxes – The minimization of fund expenses, trading costs and tax considerations is essential to the success of any portfolio. Bledsoe is committed to reducing clients’ exposure to high fees and unnecessary tax considerations in order to maximize net return.

### Key Financial Services

Bledsoe Asset Management offers all of the basic services that clients need to maintain healthy financial lives, including portfolio management, investment advisory services, and financial planning.

Bledsoe’s portfolio management service provides clients with strategies formulated to meet their financial targets. The firm’s financial planning takes an all-inclusive approach to analyzing each client’s situation in order to create a plan that emphasizes long-term success, and its independent investment advice is given with a thorough understanding of the importance of adhering to clients’ goals, risk tolerances, and return expectations.

### Expertise in Public Safety Personnel Retirement Planning

A unique aspect of Bledsoe Asset Management is its focus and expertise in Public Safety Retirement Programs.

The [firm’s experience](#) can help individuals with questions about DROP rollovers, government pensions, deferred compensation, and investment accounts clarify their retirement outlooks and situations.

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## **Exeter Financial Review**

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Founded in 2006, [Exeter Financial](#) is an independent, fee-only wealth management firm based in Scottsdale, Arizona. The firm consists of a team of highly experienced professionals with expertise in the areas of investing, tax, and estate planning. It prides itself in its ability to work with wealthy families to deliver a smooth and pleasant wealth management experience.

The Exeter team works with its high net-worth clients to build tailored financial plans that place clients in control of their present and future financial situations. The firm is dedicated to giving its clients the best experience possible and so works with only a limited number of families. Exeter Financial's minimum investment is set at \$1 million dollars.

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

Below are key factors that enabled Exeter Financial to be rated a top 2016 Arizona wealth management firm.

#### Wide Range of Services

Exeter Financial offers a wide range of services, all of which are highly personalized and hands-on. These services include private wealth management, investment management, philanthropic planning, estate and trust planning, insurance services and tax planning.

The full range of services that Exeter offers means that clients can have all of their financial needs cared for at a single location.

#### Focus on Clients

Exeter Financial's platform, team and process was put together to suit the needs and desires of its clients, many of which are entrepreneurs, executives, and family offices.

Attractive features include:

- Independence and a fully transparent process
- Integrated approach
- Highly experienced professionals
- Customized reporting
- Institutional processes

#### Commitment to Company Culture



A company's culture has a large impact on the way it interacts with clients and handles situations. Exeter's culture is based on the firm's commitment to integrity, excellence, teamwork, and entrepreneurial spirit. This, in combination with its dedication to placing clients first, increases the possibility of satisfying long-term relationships between the firm and its clients.

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## Heritage Advisors Review

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One of the top wealth management firms in Phoenix, Arizona, [Heritage Advisors](#) specializes in providing its clients with a full-service, family office experience. The firm combines expertise in tax, law, wealth management, and insurance with the ultimate goal of helping its clients build and maintain wealth.

It focuses on the following areas: financial planning, asset preservation, and investment management through the lens of strategic tax planning. Heritage Advisors' integrative structure gives the firm a unique edge above its competitors. Because its services are best suited to high-net-worth clients, the firm's minimum client investment is set at \$1 million.

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

Below are key factors that enabled Heritage Advisors to rank as a top 2016 wealth management firm in Phoenix.

#### Wide Range of Expertise

The Heritage team combines expertise in tax, wealth management, law, and insurance. This provides clients with a full suite of in-house services.



Heritage Advisors' services include tax planning, accounting services, restructuring, business valuation, mergers and acquisitions, financial planning, retirement planning, wealth transfer services, IRA solutions, estate plan reviews, life insurance planning, and business succession planning.

Additional services include expert advising in marital deductions, life insurance, life-time income, and long-term care.

### Retirement Planning and IRA/RMD Solutions

Heritage Advisors guides its clients through the process of retirement planning with the belief that careful and early planning leads to optimal results.

The firm has a wide range of IRA and RMD solutions that promise excellent results, including the ability to keep 100% of original portfolio principal as a death benefit despite mandatory withdrawals and market conditions.

### Law-Based Services

Not all financial advisors are able to provide law-based consulting services. Heritage Advisors has partnered with Nelson Law Firm to provide a suite of options to its clients which combine finance and law. These services include estate plan reviews, life insurance and estate planning, business succession planning, marital deduction planning, and QPRTs.

A QPRT is a qualified personal residence trust, a tool that allows individuals to take advantage of their \$1 million lifetime gift tax exemptions. This can greatly increase the amount of wealth passed on to beneficiaries and can also provide a reduction in estate taxes.

### Fixed Index Annuities

The current market climate requires expertise in dealing with volatility. Heritage's answer to protecting assets in a difficult market environment is fixed index annuities.

The firm is familiar with a wide range of annuities that it chooses and customizes based on each client's needs and goals to better protect the wealth that clients have worked so hard to accumulate.

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## LifeTyme Financial Review

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An independent financial firm based in Phoenix, [LifeTyme Financial, LLC](#) works with individuals, families and small business owners to help them realize their financial goals.

The firm has a strong focus on financial education and is committed to building partnerships with their clients for the long-run. Its team holds over 41 years of combined experience in helping others achieve their lifestyle dreams through better investing.

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

Below are key factors that enabled LifeTyme Financial to be ranked a top-rated financial planning firm in Arizona.

### Wide Range of Services

LifeTyme Financial's services include asset management, life and long-term care insurance, retirement and supplemental programs, college funding plans, elder care protection, and estate and tax planning strategies.

The wide range of services the firm offers centers around the everyday needs that every financially responsible person faces.

- Asset Management – LifeTyme will create an investment portfolio based on the client's goals and risk tolerance.
- Life and Long-Term Care Insurance – The firm believes that proper coverage is essential to a healthy financial strategy.
- Retirement/Supplemental Programs – Whether the goal is to build a consistent income or to manage assets, LifeTyme can help clients get there.
- College Funding Plans and Elder Care Protection – The firm's advisors are well-versed in college savings plans as well as elder care funding and insurance options.
- Estate and Tax Planning Strategies – LifeTyme understands the importance of preserving assets during transfer and beyond through effective tax strategies.

### Experience with Corporate Solutions

In addition to working with individuals and families, LifeTyme has experience with the variety of financial situations that businesses must manage. The firm offers a suite of corporate solutions, including executive compensation programs such as deferred compensation, executive bonuses, split dollar, Section 79, and fully insured 412(e)(3)s.

Other services include tax planning strategies, business continuation programs, buy/sell strategies, and retirement plan solutions.

The firm's dual expertise with financial services geared toward businesses and individuals or families makes it an ideal choice for small business owners who would like to have all of their financial management needs cared for at a single location.

### Large Resource Pool

The LifeTyme Financial [website](#) contains a large variety of resources on every topic, from retirement to lifestyle financial management.

Additionally, the company hosts educational events across the country as well as interactive webinars to keep its clients updated on the latest financial news and regulations. LifeTyme believes that knowledge is key to a successful financial future and is dedicated to helping its clients achieve just that.

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## Miller Russell Associates Review

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One of the top registered investment advisors in Phoenix, [Miller Russell Associates](#) provides investment, wealth management, and tax compliance and consulting services to corporations, endowments, foundations, sovereign nations, individuals, and families throughout the U.S.

Founded in 1991, the firm has since grown to employ over 40 professionals and support staff. It has over \$2 billion in assets under management and has received CEFEX certification, an independent assessment recognizing its adherence to the industry's highest fiduciary standards.

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

Below are key factors that enabled Miller Russell Associates to be rated as one of 2016's top registered investment advisors in Phoenix, Arizona.

#### Defined Wealth Management Process

Miller Russell Associates' defined wealth management process places client interests at the forefront and ensures that financial decisions are made only when all of the facts are at hand.



Miller Russell Associates aims to do the following throughout the wealth management process.

- Develop a holistic view of the client's overall financial picture.
- Place the client's interests above all others.
- Provide clients with a unique company structure that allows clients to work with a full team of experts.

### Emphasis on Communication

Miller Russell Associates place a strong emphasis on ongoing communication. They believe that one of the key aspects of successful relationships is understanding their clients' goals and take the time to do so. After an understanding is reached, Miller Russell's experienced team comes together to help clients clarify their objectives, establish a plan, and execute that plan.

This is all done as a partnership between the firm and its clients.

### Experience with Institutional Clients

Miller Russell Associates has the experience and expertise to serve the specialized needs of institutional clients.

The firm's institutional services include:

- Discovery for objectives and goals
- Discretionary asset management
- Quarterly investment review meetings
- Monte Carlo modeling
- Manager search, selection, and retention
- Portfolio construction
- Risk tolerance evaluation
- Sensitivity analysis
- Investment, endowment, and spending policy development
- Fiduciary education

### Community Involvement

One of the markers of a great firm is whether or not it gives back to its community. The firm is involved with a variety of community organizations, including the Arcadia Little League, Arizona Commission on the Arts Arizona Community, Foundation Arizona Hispanic Chamber of Commerce, Arizona

State University, Big Brothers Big Sisters, Boys and Girls Clubs of Metropolitan Phoenix, and the CFA Institute.

It supports these organizations through membership on the organizations' boards and regular volunteering.

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## Perspective Financial Services Review

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An independent, fee-only Registered Investment Advisory firm in Phoenix, [Perspective Financial Services](#) provides established investment strategies and communication-based relationships for its clients.

The firm's focus on research and strategy is designed to give clients a sense of control and peace of mind when it comes to their financial situations.

The firm compares working with a financial planner to working with a qualified health care professional. It is dedicated to providing its clients with caring financial planners so that clients can identify goals and maintain healthy portfolios in spite of turbulent economic times.

This dedication is what puts Perspective on this list of top financial planning and wealth management firms in Phoenix.

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

Below are key factors that enabled Perspective Financial Services to be ranked a top-rated Registered Investment Advisory firm in Phoenix.

#### Fact-Based Investing

Perspective Financial Services' investment approach is based on Modern Portfolio Theory, a school of thought first documented by Nobel Prize winner Harry Markowitz.

The theory quantifies risk and leads to the widely accepted concept that diversification is key to reducing portfolio risk. Perspective believes in the importance of maintaining a diversified portfolio. Its strategy is based in the maintenance of a portfolio well-diversified across investment classes and industries.

Additionally, the firm believes that facts are key to a sound financial plan. Answers to questions like “What is your target retirement age?” and “What level of lifestyle are you currently living in terms of monthly expenditures?” can help create financial plans that give clients the ability to live the retirement lifestyles they desire.

### Variety of Financial Solutions and Investment Management Services

Perspective Financial Services offers a variety of financial solutions, including:

- Retirement planning
- College savings
- Business enhancement and continuation
- Estate preservation and transfer
- Employee benefits
- Insurance analysis
- Tax strategies

It also offers personalized investment management services, such as:

- Goal-specific investment plan
- Continual portfolio management and oversight
- Timely communication
- Independent institutional money management

### Online Tools

In this technological age, easy access to services through the Internet has become an important factor in client satisfaction. Perspective’s easy-to-use online portal allows clients to communicate with the firm, gauge their financial progress, and view investments and actions with a few clicks.

The portal includes a secure document vault, portfolio reporting, and personal financial planning tools which provide access to clients’ financial plans, reports, and goals online. The convenience of this is another reason why Perspective is on our list of top financial planners in Phoenix and surrounding areas.

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## **Silverhawk Wealth Management Review**



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One of the top wealth management firms in Phoenix, [Silverhawk Wealth Management's](#) mission is to help its clients plan, grow, and protect their wealth. The firm's expertise in asset protection and allocation allow it to manage its clients' assets with a continuous focus on reducing tax liabilities whenever possible.

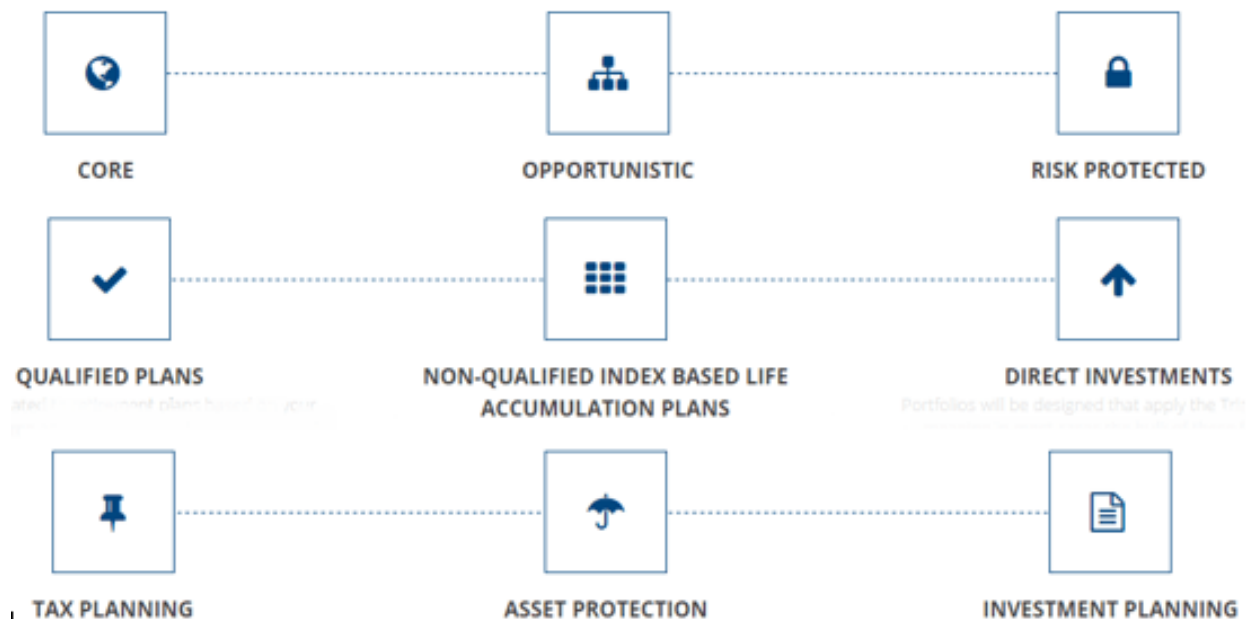
Over 50 years of combined experience in advising individuals, physicians, corporations, professional athletes, tax attorneys, celebrities, and CPAs makes Silverhawk a great choice if you are looking for experience and consistency of service.

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

Below are some key factors that enabled Silverhawk Wealth Management to rank as a top 2016 wealth advisory firm in Arizona.

#### Tria Formula™

Silverhawk's Tria Formula™ is a process that helps identify the ideal asset allocation for each client on a personalized basis.



The formula is comprised of three sets of three, as seen above: core, opportunistic, and risk protected; qualified plans, non-qualified index based

life accumulation plans, and direct investments; tax planning, asset protection and investment planning.

These nine elements come together to form a client's integrative wealth management strategy.

### Realty Services

One of the most unique aspects of Silverhawk is the existence of Silverhawk Realty. The firm is experienced in dealing with traditional sales, creative financing strategies, short sales and strategic defaults and has served a variety of clients' real estate needs.

Silverhawk's network of reliable title companies, lenders, inspectors and contractors is able to handle all aspects of real estate transactions, ensuring a smooth experience long after transactions are completed.

The benefit of having in-house realty services is that clients who have more extensive real estate needs or who have a variety of assets tied up in realty can benefit from Silverhawk's multi-faceted expertise.

### Employee Benefits Management

Silverhawk Wealth Management's employee benefits management capabilities are another attractive feature about the firm.

Silverhawk seeks to help business owners increase profits by reducing the cost of providing employee benefits by identifying a variety of cost-effective methods to provide coverage, including direct purchase, association health plans, Professional Employer Organizations, or employee leasing.

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## **Surevest Wealth Management Review**

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[Surevest Wealth Management](#) is an Independent Registered Investment Advisor based in Phoenix. Its designation means that the firm provides unbiased advisory services, with no proprietary or in-house products.

The firm's small but experienced team is dedicated to keeping their knowledge and skills sharp and up-to-date. Robert J. Luna, CEO, has over 16 years of experience in asset management for institutions, small business owners,

wealthy investors, and professional athletes. Jeremy A. Kisner, the firm's senior wealth advisor, is a Certified Financial Planner™, Chartered Retirement Plans Specialist, and Certified Estate Planner.

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

Below are key factors that enabled Surevest Wealth Management to be rated a top 2016 Arizona wealth management firm.

### Multi-Level Services

While many firms focus only on the wealthiest of clients, Surevest Wealth Management has organized its services into a simple, tiered structure.

- **Family Office Services** – These services include integrated tax, financial, and estate planning. The firm may act as a CFO screener of outside investment proposals and provide CEO relationship oversight. Clients in this tier also receive customized investment portfolios, consolidated reporting of assets and SV Prosperity concierge services if they so choose. Minimum investment for membership in this category starts at \$5 million.
- **Private Wealth Management** – This category includes clients who had \$1 to \$5 million in assets under management. Its services include coordinated tax, financial and estate planning, portfolio management, access to SV Prosperity concierge services at a discounted hourly rate, and a senior relationship manager.
- **Planning & Asset Management** – Services include financial planning, portfolio management, and a designated client-firm relationship manager. The minimum investment is \$250,000.

### Small Size

Surevest's small size ensures that all of its client relationships are cultivated through personalized attention and trust.

All relationships start with at least one complimentary consultation which runs from one to two hours. If all goes well during this meeting, a second meeting is set up to address more detailed aspects of the client's expectations and desires. During this meeting, Surevest presents the client with a thorough

analysis of their current investment portfolio and recommendations on how to improve their financial situation.

The firm is dedicated to cultivating long-term personalized relationships that provide clients with peace-of-mind concerning their finances.

### Client-Based Portfolio Targets

Surevest designs its portfolios to maintain the purchasing power and meet the goals of its clients throughout their lives. Each client's portfolio has a target rate of return of inflation plus 2-6% based on the client's personal needs. This inflation-sensitive approach ensures that clients will not lose purchasing power due to rising inflation.

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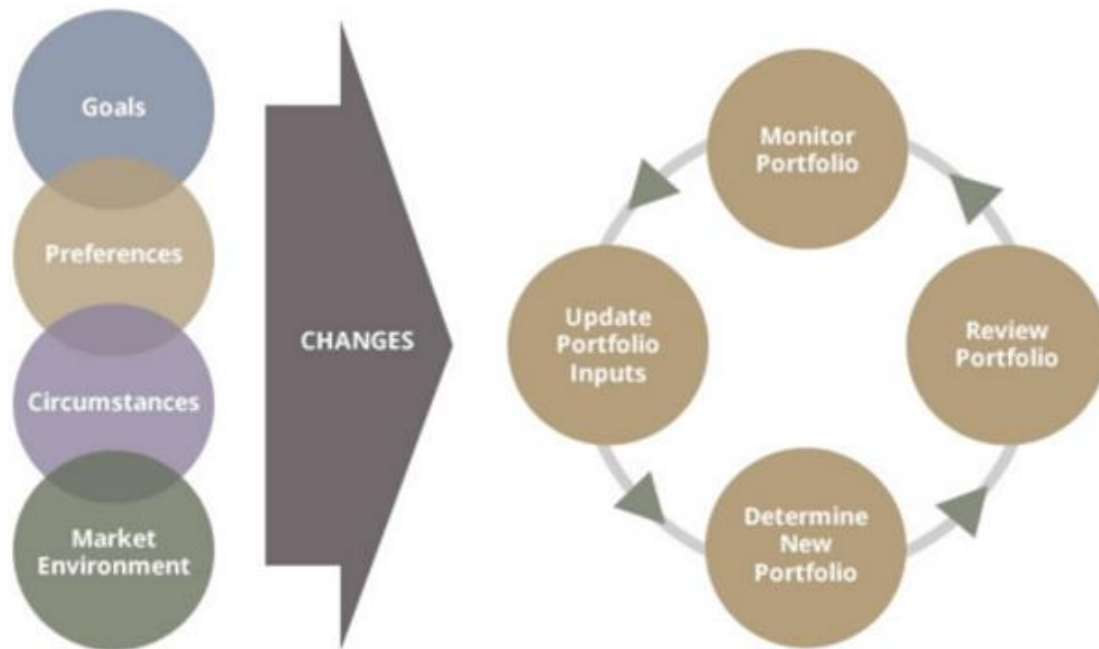
## **Versant Capital Management, Inc. Review**

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[Versant Capital Management, Inc.](#) is an independent, fee-only investment and wealth management firm in Phoenix, AZ, that believes in the quality of service, as opposed to quantity, as a core company value.

Established in 2004 by Tom Connelly, a trained geologist and 30-year financial industry veteran, the company prides itself on being industry leaders in embracing best practices to enhance the efficacy of its business.

The company's genesis for delivering unbiased, conflict of interest-free advice dates back to 1990, when Tom Connelly worked for a firm of fee-only advisors. This business model, of receiving no soft dollars, sales commissions or markups on investment products, forms part of Versant's DNA even today.



The company works in partnership with its clients (and client families) to understand their current financial position, investment goals, risk tolerance, and investment preferences. Based on these inputs, the firm’s advisors will customize unique portfolios, review and monitor them on an ongoing basis, and apply changes to the overall portfolio in continuous consultation with clients.

Investment Management Services include:

- Investment needs assessment
- Portfolio construction
- Portfolio review
- Portfolio monitoring
- Updates to portfolios

Wealth Management Services include:

- Capital sufficiency analysis
- Family financial resources
- Investment performance reporting & coordination
- Family governance

A firm of highly experienced Phoenix wealth managers, Versant takes its name from a time-honored word for “experienced” or “practiced,” highlighting the

firm's primary objective, which is to act as skilled, well-versed, and highly knowledgeable financial and wealth advisory partners to their clients.

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

Below are key factors that enabled Versant Capital Management, Inc. to be ranked a top-rated financial planning firm in Arizona.

### Independent Advisors:

Versant is an independent wealth manager in Phoenix that operates autonomously, with no affiliations or associations to large financial corporations, investment bankers, or financial product sellers. This independence allows the company's advisors the freedom to provide unbiased advice to its clients.

### Fee-only Fiduciaries:

As a fee-only Phoenix wealth management firm, the company is compensated only by its clients, accepting no other commissions or referral charges for product sales. The company acts as fiduciaries to their clients, which mandates that all advice offered is done to keep the client's interest above all others.

### Vested in the Communities They Serve:

As premier wealth managers in Phoenix, Versant Capital's management and staff choose to give back—in time, effort, and philanthropic giving—to the communities they serve. The Versant team gives generously through their professional skills, volunteerism, sponsorships, and board leadership in partnership with various city/state institutions.

### Accessible Senior Management:

Unlike many of the company's peer investment and wealth management firms in Phoenix, Versant Capital clients have direct access to the firm's Chief Investment Officer, who oversees the managing of client portfolios and helps clients understand and interpret the firm's investment philosophy.

### Focus on Long-term Relationships:

The Versant Capital advisory team places strong emphasis on building multi-generational relationships with its clients. Company professionals will engage, educate, and work closely with clients, their kids, and grandkids to ensure the entire family is involved throughout the advisory process.

#### Beyond Wealth Advisory:

As a leading wealth manager in Phoenix, Versant Capital provides value-add beyond its core services to its clients. It does so by collaborating and coordinating its own services with those of other professionals, such as bankers, lawyers, brokerage firms, and insurance agents with whom the client may have dealings. This ensures the implementation of a highly integrated financial, investment, and wealth management strategy.

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## **WealthTrust Arizona Review**

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[WealthTrust Arizona](#) offers fee-only financial planning services to Arizona and 35 other states from its offices in Scottsdale and Chandler.

The firm works with a select group of high-net worth clients, ensuring that each and every client receives personalized attention through a long-term relationship with his or her financial advisor.

A unique aspect of the firm is that it is committee-based, meaning WealthTrust's financial planners serve on committees that track economic trends and market climates. This ensures that clients receive advice that is based on the most up-to-date information which has been vetted by multiple professionals.

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

Below are key factors that enabled WealthTrust Arizona to be ranked a top-rated financial planning firm in Arizona.

#### Five-Pronged Approach

WealthTrust Arizona's professionals provide clients with wealth management solutions in five essential areas: financial planning, portfolio management, retirement planning, estate planning, and risk management.

The firm believes that integration of portfolio and estate is important to the creation of an effective wealth management strategy. In order to accomplish this, WealthTrust's planners and advisors focus on the following activities:

- Development of strategic financial plans which evaluate clients' current situations and determines how best to achieve future goals
- Analysis of existing insurance and estate policies to anticipate upcoming challenges
- Monitoring of tax laws and political and macro-economic situations
- Review of estate plans to ensure maximum tax benefits
- Maintenance of relationships with client CPAs and estate planning attorneys to ensure that clients' assets are accurately titled

### Large Size

WealthTrust Arizona's large size provides clients with a variety of tools which may not be available at smaller firms. WealthTrust Arizona's affiliation with WealthTrust, LLC offers access to a large network of professionals as well as insight into a variety of complex financial tools and situations, including:

- Asset allocation
- Retirement planning
- Key person protection
- Educational planning
- Buy/sell agreements
- Hedging strategies
- Asset titling
- Business succession
- Charitable giving strategies

### Experience

When it comes to the management of your money, you want only the most experienced professionals at your side.

The team at WealthTrust Arizona has over one hundred years of combined experience in dealing with complicated wealth management and estate planning issues for individuals and families. The firm's certified financial advisors are highly educated, with a variety of certifications and advanced degrees, including Certified Financial Planner, Master of Business Administration, Certified Funds Specialist, Chartered Financial Analyst, and Chartered Financial Consultant.



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## **Conclusion – Top 11 Financial Advisors in Phoenix & Scottsdale, Arizona**

In reality, the answer to the question “which is the best financial advisor or wealth manager in Phoenix” is entirely subjective and will depend on your individual goals, needs, and desires.

The next step is to choose three to five firms from the list that seem to best suit your needs and set up an appointment to meet the advisors. After that, you will have all of the information you need to make an informed decision and take yet another step toward your financial target.

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If you have questions, comments, or tips about this "Top 11 Financial Advisors in Phoenix & Scottsdale, Arizona" article, send us an [email](#). Follow us on social media to be the first to hear about major economic news stories.

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Cheers,  
AdvisoryHQ Team

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