

Top 11 Financial Advisors in Phoenix & Scottsdale, AZ | 2017 Ranking | Phoenix & Scottsdale Wealth Managers

2017 RANKING & REVIEWS TOP RANKING FINANCIAL ADVISORS IN PHOENIX AND SCOTTSDALE

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 Arizona?

The large number of financial advisors in the Phoenix and Scottsdale area 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.



Award Emblem: Top 11 Financial Advisors in Phoenix & Scottsdale, AZ

AdvisoryHQ's List of the Top 11 Best Financial Advisors in Phoenix and Scottsdale, Arizona

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

- [**Alpha Fiduciary**](#)
- [**Bledsoe Asset Management, LLC**](#)
- [**LifeTyme Financial, LLC**](#)
- [**MRA Associates**](#)
- [**Perspective Financial Services**](#)
- [**Ronald Blue & Co.**](#)
- [**Sensible Money**](#)
- [**Silverhawk Wealth Management**](#)
- [**Surevest Wealth Management**](#)

- [Versant Capital Management, Inc.](#)
- [WealthTrust Arizona](#)

Top 11 Financial Advisors in Phoenix and Scottsdale, Arizona | Brief Comparison

Financial Advisors in Phoenix & Scottsdale	Highlighted Features
Alpha Fiduciary	Integrated wealth management
Bledsoe Asset Management, LLC	Public Safety Personnel Retirement Planning
LifeTyme Financial, LLC	Corporate solutions
MRA Associates	Defined wealth management process
Perspective Financial Services	Investing with Modern Portfolio Theory
Ronald Blue & Co.	Christian financial advising
Sensible Money	Juicing ^(R) and Juicing Plus ^(R)
Silverhawk Wealth Management	Realty Services
Surevest Wealth Management	Tiered Services
Versant Capital Management	Community services
WealthTrust Arizona	Five Pronged Approach

Table: Top 11 Best Financial Advisors in Pheonix and Scottsdale | Above list is sorted alphabetically

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services, and products that are ranked on its various top rated lists?

Please click here “[AdvisoryHQ's Ranking Methodologies](#)” for a detailed review of AdvisoryHQ’s selection methodologies for ranking top rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Top Ranking Best Wealth Management Firms in Phoenix and Scottsdale

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

See Also: [Best Financial Advisors in Chicago, IL | Ranking | Chicago Wealth Management Firms](#)

Alpha Fiduciary Review

As one of the top registered investment advisors in Phoenix, [Alpha Fiduciary](#) maintains a strong focus on its duty to its clients. This Phoenix wealth management 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.

They do not clearly state whether they are a fee-only or fee-based investment firm on their website, but we have included them on this list for their integrated wealth management services and clearly defined investment strategies.



Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Phoenix

Below are key factors that enabled Alpha Fiduciary to rank as a top wealth management firm in Phoenix.

Integrated Wealth Management

Alpha Fiduciary believes that wealth management encompasses a spectrum of services, including investment consulting, advanced planning and relationship management. This top wealth management firm in Phoenix 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 – This Phoenix financial advisory 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. Their team of

Phoenix financial advisors seek to be readily available to its clients at all times.

Alpha's wealth management process is as follows:

- Discovery meeting
- Defining 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. This wealth management firm in Phoenix 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.

Bledsoe Asset Management Review

Based out of Phoenix, Arizona, [Bledsoe Asset Management](#) has been helping its clients achieve their financial goals since 2008.

As a Registered Investment Advisor, this Phoenix wealth management firm is bound by law to offer unbiased advice and put its clients' interests above its own. Bledsoe's mission is to help its clients live the lives they desire through the preservation and growth of their wealth.

This Phoenix financial advisory 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.

They do not clearly say whether they are a fee-only or fee-based wealth management firm in Phoenix, but we have included them on our list for the range of services that they offer.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Phoenix

Below are key factors that enabled Bledsoe Asset Management to rank as one of the top wealth management firms in Phoenix.

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 - This Phoenix financial advisory 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. This Phoenix wealth management 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.

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.

This Phoenix financial advisory firm's [experience](#) can help individuals with questions about DROP rollovers, government pensions, deferred

compensation, and investment accounts clarify their retirement outlooks and situations.

[Don't Miss: Best Financial Advisors in Des Moines, Ames & Davenport, IA | Ranking | Des Moines Area Wealth Managers](#)

LifeTyme Financial Review

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.

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

LifeTyme Financial, LLC is a fee-based financial advisory firm in Phoenix, but we have included them on our list for the range of services they provide.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Phoenix

Below are key factors that enabled LifeTyme Financial to be ranked as a top wealth management firm in Phoenix.

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](#) this financial planning firm in Phoenix 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 businesses manage. This wealth management firm in Phoenix 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 business-related services offered by this Phoenix financial advisory firm include tax planning strategies, business continuation programs, buy/sell strategies, and retirement plan solutions.

This top wealth management firm in Phoenix'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, this Phoenix financial advisory firm 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.

MRA Associates Review

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

Founded in 1991, MRA has since grown to become a premier management wealth management firm in Phoenix. It has received [CEFEX certification](#), an independent assessment recognizing its adherence to the industry's highest fiduciary standards.

As a fee-only wealth management firm, MRA Associates is an [independent fiduciary](#) that offers widely sought financial advisory services.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Phoenix

Below are key factors that enabled MRA Associates to be rated as one of the top financial advisory firms in Phoenix.

Defined Wealth Management Process

MRA's 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.

MRA 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

MRA place a strong emphasis on ongoing communication. Their financial advisors in Phoenix believe that one of the key aspects of successful relationships is understanding their clients' goals and taking the time to do so.

After an understanding is reached, this Phoenix wealth management firm'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

MRA has the experience and expertise to serve the specialized needs of institutional clients.

This Phoenix wealth management 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 firm is whether or not it gives back to its community.

This wealth management firm in Phoenix 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.

[Related: Best Financial Advisors in Wisconsin | Ranking | Top Wisconsin Wealth Managers](#)

Perspective Financial Services Review

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

This Phoenix wealth management 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. This Phoenix financial advisory firm is dedicated to providing clients with caring financial planners so that they 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 Wealth Management Firm in Phoenix

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

Investing with Modern Portfolio Theory

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. This Phoenix wealth management firm believes in the importance of maintaining a diversified portfolio. Its strategy is based on the maintenance of a portfolio well-diversified across investment classes and industries.

Additionally, this Phoenix financial advisory 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 plans
- 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 this wealth management firm in Phoenix, 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.

Ronald Blue & Co. Review

[Ronald Blue & Co.](#) is a wealth management firm in Tempe, Arizona. In fact, there are 13 offices spread around the country that provide the firm's four divisions of service: Everyday Steward, Private Wealth, Family Office, and Professional Management.

Ronald Blue & Co stands out from the other Arizona wealth management firms on this list because it offers something different. This financial advisory firm provides Christian financial advice and planning for individuals who want to grow and preserve their wealth in a manner that is in line with biblical principles.

Ronald Blue & Co. is a [fee-only](#) wealth management firm in Tempe, Arizona.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Tempe

Below are key factors that enabled Ronald Blue & Co. to be ranked a top-rated Registered Investment Advisory firm in Tempe.

Financial and Spiritual Enrichment

Financial planning is not just about growing wealth. It's about setting up your money so that it helps you do what you want to do with your life. For a Christian, this may involve living in line with biblical principles, serving their community, and giving to the less fortunate. Ronald Blue & Co is a wealth management firm in Arizona that can help individuals do all of these things.

These Arizona financial advisors work with clients to guarantee they are, as they put it, living their "[life well spent](#)."

Overall Financial Planning

Good financial planning covers your entire life and all of its accompanying events and transitions so that you don't have to worry about your money too much. Ronald Blue & Co. can help individuals engage in effective financial planning.

Their Arizona financial planners can turn your life's dreams and aspirations into reality. They can help you minimize your debt, plan for your child's college tuition, understand the tax implications of different financial choices, and more.

This financial planning process is assisted by BluePrint, the company's proprietary tool. It helps these Tempe financial planners understand and consider the different factors that have to be included in a client's financial plan. This ensures comprehensive and thorough strategizing and decision-making.

Philanthropic Counsel

One of the core values of Ronald Blue & Co is giving back. In fact, this is central to the story of this Tempe wealth management firm. They make the assumption that this is an important part of the financial planning process for their clients.

These financial planners in Tempe can help clients figure out how they can give back some of the wealth they have been fortunate enough to accumulate. Over the years, their clients have [donated a combined hundreds of millions of dollars](#) to charitable causes and initiatives.

This focus on giving back helps clients live up to the Christian teaching that "Giving is key to becoming free from the power of money over our lives."

[Popular Articles: Top Financial Advisors in Greensboro, Chapel Hill, & Winston-Salem, NC | Ranking | Greensboro, Chapel Hill, & Winston-Salem Wealth Managers](#)

Sensible Money Review

[Sensible Money](#)'s choice of name tells you a lot about this Scottsdale financial advisory firm's approach to wealth management. Their goal is to help clients understand the outcome and consequences of the financial choices they make through education and advice.

This financial advisory firm in Scottsdale takes enormous pride in its ability to explain complex and intersecting financial topics related to taxes, investments, and retirement and explain them in a way that is understandable and accessible for clients.

Sensible Money is a [fee-only](#) wealth management firm in Scottsdale, Arizona.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Scottsdale

Below are key factors that enabled Sensible Money to be ranked a top wealth management firm in Scottsdale.

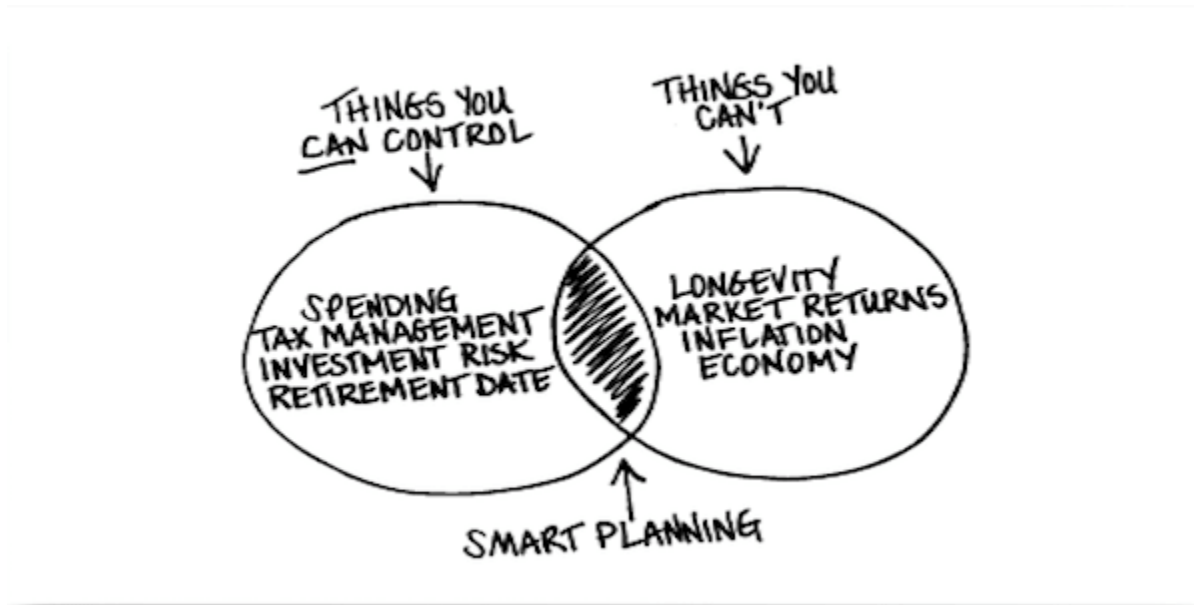
Smart Planning Approach

The work that goes into financial planning requires a step-by-step process that will make your money work as hard as you do. This wealth management firm in Scottsdale helps you identify what matters and focus your planning efforts on these priorities.

Oftentimes, we make poor choices because we haven't taken the time to determine exactly what it is we want. The Scottsdale financial advisors at Sensible Money have a "[Smart Planning](#)" conversation with their clients so that they understand the different variables that are at play.

Sensible Money's financial planners in Scottsdale show you what you can control (i.e. spending, tax management, investment risk, retirement date) and what you can't control (i.e. longevity, market returns, inflation, the economy).

Smart Planning is how these two things overlap. Strategic investment choices and proactive planning can help grow and protect your money in spite of the factors that are outside an investor's control.



Juicing^(R) and Juicing^(R) Plus

[Juicing^{\(R\)}](#) is the brand name for Sensible Money's financial planning offering. This "product" offered by this wealth management firm in Scottsdale is a process that incorporates your financial planning needs with your personal values. The pricing for your Juicing^(R) Plan is based on the number of hours it takes for Sensible Money's financial planners in Scottsdale to put together your plan.

Juicing^(R) Plus is an all-inclusive financial planning service that is available to clients with investible assets of more than \$1 million. They can provide a full range of wealth management services and are available to coordinate with other professionals who may assist your with your finances including CPAs, attorneys, mortgage brokers, and more.

Complimentary Introductory Meeting

You do not have to decide whether you want to work with Sensible Money right off the bat. They offer a [complimentary introductory session](#) where they will have a conversation about whether financial planning is right for you. This is also where a Scottsdale financial planner will provide an estimate of how much financial planning for your specific situation will cost.

Sensible Money has another standout feature as a wealth management firm in Arizona. While many financial planners offer complimentary sessions, not much is done to help prospective clients think about the content of the meeting beforehand. Sensible Money asks interested individuals to fill out

[Pre-Meeting Questions](#) before coming in for their introductory meeting. This gives individuals a better understanding of what they'll be discussing, and it helps the meeting move more efficiently.

Silverhawk Wealth Management Review

One of the top wealth management firms in Scottsdale, [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 allows it to manage its clients' assets with a continuous focus on reducing tax liabilities whenever possible.

Over [40 years of 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.

We cannot confirm whether Silverhawk is a fee-only or fee-based wealth management firm in Scottsdale. That said, we have included them on this list for their unique Tria Formula™ and the realty services that they offer.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Scottsdale

Below are key factors that enabled Silverhawk Private Wealth to be ranked a top wealth management firm in Scottsdale.

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 participates in your portfolio in the following ways:

- **Core:** This part of your portfolio accesses the world's bond and equity markets. This area is broadly diversified in a way that meets your financial objectives while managing potential risks.
- **Opportunistic:** Investments in non-correlated asset categories protects clients from downturns in the bond and equity markets.

- Risk Protected: Prioritization on asset allocation to protect from potential losses

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.

This Arizona wealth management firm'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 this Scottsdale financial advisory firm'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. This Scottsdale financial advisory firm does this by identifying a variety of cost-effective methods to provide coverage, including direct purchase, association health plans, Professional Employer Organizations, or employee leasing.

[Read More: Best Financial Advisors in Atlanta, GA | Ranking | Atlanta Area Wealth Managers](#)

Surevest Wealth Management Review

[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 18 years of experience in asset management for institutions, small business owners, wealthy investors, and professionals athletes. Jeremy A. Kisner, the firm's senior wealth advisor, is a Certified Financial Planner™, Chartered Retirement Plans Specialist, and Certified Estate Planner.

We could not confirm whether Surevest is a fee-only or fee-based wealth management firm in Phoenix, but we have included them on our list for the range of services they provide including Family Office and Private Wealth Management.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Phoenix

Below are key factors that enabled Surevest to be ranked a top wealth management firm in Phoenix.

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. This Phoenix wealth management 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 have \$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. There is no minimum asset level for these services.

Small Size

Surevest's small size as a Phoenix financial advisory firm 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, a Surevest financial advisor in Phoenix presents the client with a thorough analysis of their current investment portfolio and recommendations on how to improve their financial situation.

This Phoenix wealth management 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.

Versant Capital Management, Inc. Review

[Versant Capital Management, Inc.](#) is an independent, [fee-only](#) investment and wealth management firm in Phoenix, Arizona, 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, this wealth management firm in Phoenix 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 Phoenix financial advisory 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 Wealth Management Firm in Phoenix

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 management firm 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.

Invested in the Communities They Serve

As premier financial advisors 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 and 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 added value beyond its core services to its clients. It does so by collaborating and coordinating the services of its Phoenix wealth management firm 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.

[Related: Best Financial Advisors in Pittsburgh, PA | Ranking | Pittsburgh Wealth Management Firms](#)

WealthTrust Arizona Review

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

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

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.

This Scottsdale wealth management 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. This Scottsdale wealth management firm'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 of Scottsdale financial advisors at WealthTrust Arizona has years of combined experience 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.

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 and Scottsdale” 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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