

# Top 8 Best Financial Advisors in Seattle, Bellevue, & Kirkland WA | 2017 Ranking | Seattle Area Wealth Management Firms

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## 2017 RANKING & REVIEWS TOP FINANCIAL ADVISORS IN WASHINGTON STATE

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### Finding Top Financial Advisors and Wealth Managers in Seattle, Bellevue, and Kirkland (Washington)

Whether you have already entered retirement or are just starting out in your financial planning and wealth management journey, having a good financial advisor by your side can be the difference between financial success and financial hardship.

The questions then become: Who are the best financial advisors in Seattle? Who are the top ranking wealth management firms in Bellevue, Kirkland, and other areas in Washington?

The sheer number of financial advisors in Seattle and its surrounding areas makes choosing just one advisor a difficult task. However, by developing a clear idea of the services you are looking for and doing proper research, the answers to the following questions will soon become clear:

- Should I go with a fee-only fiduciary financial planner? How does a Washington-based (Seattle, Bellevue, Kirkland, etc.), independent advisor benefit me?
- Where can I find the best financial planning, wealth management, and asset management services in Seattle, Bellevue, Kirkland or across Washington state?
- Where should I go if I am looking for additional services like estate planning, tax management, and risk management?
- What types of fees do financial planners in Seattle charge?

While the final decision rests in your hands, we have compiled a list of the top financial advisors in Seattle, Bellevue, and Kirkland to help give you a jump-start on your way to financial success if you reside in Washington.



*Award Emblem: Top 8 Best Financial Advisors in Seattle, Bellevue, Kirkland (Washington State)*

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## **AdvisoryHQ's List of the Top 8 Best Financial Advisors in Seattle, Bellevue, and Kirkland**

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

- [Avier Wealth Advisors](#)
- [Boone Wealth Advisors](#)
- [Conlon Dart Wealth Management](#)
- [Goddard Financial Planning](#)
- [Laird Norton Wealth Management](#)

- [Merriman](#)
- [Robinswood Financial, LLC](#)
- [Sovereign Wealth Advisors](#)

## Top 8 Financial Advisors in Seattle, Bellevue, and Kirkland, Washington | Brief Comparison

Top Wealth Management Firms in Washington State	Highlighted Features
Avier Wealth Advisors	Research driven strategy
Boone Wealth Advisors	Risk mitigating asset allocation
Conlon Dart Wealth Management	Specialized Services
Goddard Financial Planning	Hourly fee system
Laird Norton Wealth Management	Wealth Regeneration <sup>(R)</sup>
Merriman	Five step process
Robinswood Financial, LLC	Small, exclusive client base
Sovereign Wealth Advisors	Wealth building strategies

*Table: Top 8 Best Financial Advisors in Washington State | 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 Seattle, Bellevue, and Kirkland

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

***See Also: [Best Financial Advisors in Des Moines, Ames & Davenport, IA | Ranking | Des Moines Area Wealth Managers](#)***

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## **Avier Wealth Advisors Review**

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[Avier Wealth Advisors](#) offers investment advisory and financial planning services on a [fee-only](#) basis to families, businesses, and individuals.

As one of the top financial advisors in Bellevue, Avier Wealth Advisors provides clients with research-based wisdom and a wide range of investment options.

This Washington wealth management firm's partnership with Dimensional Fund Advisors gives clients access to exclusive, low-cost mutual funds that are based upon comprehensive research on long-term market drivers.

### **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Washington State**

#### **Teamwork**

Each client of Avier Wealth Advisors is supported by a three-member team comprising a lead advisor, associate advisor, and client services associate. This team of Washington financial advisors works together with the client to create a highly customized investment advisory experience.

This structure, together with Avier's commitment to a low advisor-client ratio, better ensures that clients receive the care and attention that they deserve.

#### **Comprehensive, Long-Term View**

Avier Wealth Advisors uses an integrated approach which places investment management within the context of its clients' life goals.

With its clients' risk profiles in mind, Avier diversifies portfolios across multiple investment styles and asset classes with an investment strategy designed to thrive over time.

### **Focus on Women**

In addition to its team-based services and comprehensive approach, Avier Wealth Advisors is dedicated to helping women succeed. This Washington wealth management firm's strategies aim to serve women at every stage of life by facilitating financial education and independence.

This team of Bellevue financial advisors is particularly committed to dispelling the myth that women are too busy to manage their own finances and instead, pass along the financial decisions to their significant others.

They are committed to [giving women the opportunity](#) to identify their goals and understand the strategies that will help them meet their financial objectives.

### **Commitment to Client Knowledge**

The most successful investors tend to be the most knowledgeable investors. Avier Wealth Advisors offers its clients a steady stream of opportunities to broaden their investment knowledge through regular client meetings, workshops, webinars, and reports.

Unlike many wealth management firms in Washington, which focus on high-net-worth clients who already have an expert understanding of investments, Avier endeavors to help clients, who are still in the beginning or middle stages of wealth accumulation, gain the know-how that they need to succeed.

### **Research-Driven Strategy**

Finally, Avier Wealth Advisor's investment approach is one of maximizing stability and growth while minimizing emotion and risk. The portfolio management strategies this Washington wealth management firm offers include globally diversified asset classes and stretches across a spectrum of risk tolerances to match the goals and needs of each individual client.

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## **Goddard Financial Planning Review**

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Formerly known as Blue Canoe Financial Planning, [Goddard Financial Planning](#) is a [fee-only](#) wealth management firm in Seattle. It offers its clients an investment philosophy that emphasizes flexibility and a business structure that puts emphasis on simplicity.

It is one of the companies on this list of top financial advisors in Seattle that operates solely on an hourly-fee basis.

Although their name has changed, Goddard Financial Planning continues to value the "[metaphor of canoeing as it applies to financial planning](#)." For them, financial success comes from balancing wants and needs while using expert guidance to get through choppy waters from unexpected currents or storms.



## **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Washington State**

### **Works with a Wide Range of Clients**

While most asset management companies only work with high-net-worth individuals, Goddard Financial Planning specifically states that it welcomes all levels of investors, from those who are just starting out in building their assets

to those who are simply seeking to protect or pass on what they have already built.

### **Simple Fee System**

The pricing is the most straightforward and simple system we have seen. It is hourly, and that's all. The hourly rate is charged only for the time taken to create, update, or adjust the financial plan.

Goddard Financial Planning has no fees for assets under management, does not charge for commissions, and does not do product sales.

### **Long-Term Relationships**

Goddard Financial Planning seeks to form long-term, ongoing relationships with its clients.

After the initial financial plan has been drafted and approved, clients of this top management firm in Washington can meet with advisors as often as they desire.

Annual meetings to make adjustments and track progress are available to clients who want them. Some of the things that occur during these annual meetings include updating current financial assets and rebalancing portfolios.

Also available to clients of this Washington financial advisory firm are “as-needed” meetings to deal with major and often unexpected life changes such as divorce, marriage, new children or inheritance.

***[Don't Miss: Best Financial Advisors in Chicago, IL | Ranking | Chicago Wealth Management Firms](#)***

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## **Boone Wealth Advisors Review**

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[Boone Wealth Advisors](#) founder Michael Boone envisioned a wealth management firm in Washington that would serve clients instead of simply looking out for sales quotas. He wished to create a financial advisory environment that was focused on providing personalized and client-centric service.

Boone Wealth Advisors is a [fee-only](#) wealth management firm in Bellevue, Washington.

## **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Washington**

### **Risk Mitigating Asset Allocation**

Protecting your wealth involves a sober assessment of where you can safely park your money while protecting it against inflation. The Bellevue financial advisors at Boone Wealth Advisors can help clients invest their money in a way that protects them against the twin threats of taxes and inflation.

These financial advisors in Bellevue help clients spread their assets across multiple areas so that they are in different stocks, bonds, and cash equivalents. These professionals are not about trying to beat the market. Instead, they are committed to using their knowledge of the markets to protect your money from market fluctuations while also ensuring sustainable growth.

### **Independent Financial Planning**

A financial advisor in Washington can help you go from rich to wealthy. Properly managing your money can help ensure your future financial security. One of the Bellevue financial planners at Boone Wealth Advisors can help you organize your finances and apply a strategy that can help you work towards you financial goals. Some things a financial planner can help you with [include](#):

- Drawing up a complete financial statement and setting up goals
- Analyzing relevant aspects of your current financial picture
- Identifying weaknesses and recommending improvements
- Coordinating and implementing your plan

Planning for your financial freedom and security in retirement is one of the best things you can do with your current wealth, and one of these financial advisors in Bellevue can help you do that.

### **Private Wealth Management Services**

Individuals interested in private wealth management can visit this financial advisory firm in Bellevue. Boone Wealth Advisors offers a wide selection of funds and provides its clients with special access to unique share classes.



These Bellevue financial planners can also minimize the amount of transaction fees that they wind up paying.

Boone Wealth Advisors is also independent of banks and insurance companies. This means that when they are providing wealth management services to their clients, they can recommend the best investments and products without being beholden to a specific company's proprietary offerings.

These Bellevue financial advisors work with clients who have at least \$250,000 in assets under management. They are also [offer fee reductions](#) for

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## Conlon Dart Wealth Management Review

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[Conlon Dart Wealth Management](#) is a [fee-only](#) financial advisory firm in Seattle, Washington that is dedicated to creating highly customized financial planning and asset management solutions for its clients.

This Seattle wealth management firm's experienced team exercises a holistic approach to financial planning. As one of the top financial advisors in Seattle, Conlon Dart identifies its true value to clients as its ability to help create integrated solutions within the framework of clients' complex lives.

### **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Washington State**

#### **Transparency**

Conlon Dart's fee schedule is outlined on its website. This wealth management firm in Washington works on a fee-only basis, not accepting commissions, 12(b)1 fees or compensation from third-party vendors. Additionally, Conlon Dart offers complimentary "get acquainted" meetings so that potential clients can meet the team and clear up any questions or concerns before making a commitment.

This Seattle financial advisory firm's website clearly states the types of clients that it generally works with. They typically work with those who are preparing for or transitioning towards retirement, as well as mid-career professionals.

## **Philosophy of Discipline**

Conlon Dart believes that investment management and financial planning services are not mutually exclusive. For this reason, their Seattle financial planners integrate both services into one core offering.

Conlon Dart's investment philosophy is one of common sense and discipline. It does not believe market timing works with any degree of consistency and forms its strategies accordingly. Most, if not all, of its portfolios are composed of the following: no-load and institutional class mutual funds, exchange-traded mutual funds (ETFs), index funds, and individual bonds.

## **Individualized Process**

In order to form financial solutions suited to each clients' individual needs, Conlon Dart's Seattle financial advisors will work together with other financial professionals, such as clients' tax counsel and insurance brokers, to get to know clients on a more in-depth level.

This wealth management firm in Seattle's process is designed to be highly individualized, detail-driven, and comprehensive.

After developing a comprehensive view, Conlon Dart works with clients to create individual investment policy statements. These statements summarize each client's goals and expectations according to his or her personal set of income requirements, time constraints, tax considerations, and risk tolerance.

## **Specialized Services**

As stated above, Conlon Dart generally helps clients preparing for or already in retirement, as well as mid-career professionals among others. This Seattle financial advisory firm also offers plan-level investment consulting for 401(k) plan sponsors.

This top Seattle wealth management firm's experience and expertise in the above areas makes Conlon Dart Wealth Management an ideal choice for clients in those specific situations.

**[Related: Top Financial Advisors in Denver, Colorado Springs, & Boulder, CO | Ranking | Denver, Colorado Springs, & Boulder Wealth Managers](#)**

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# Laird Norton Wealth Management Review

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One of the top Seattle-based, [fee-only](#) wealth management firms, [Laird Norton Wealth Management](#) has grown, since its beginnings in 1967, into a firm with more than [\\$4 billion](#) in assets under management. Its clients are primarily high-net-worth families, individuals, endowments, and foundations whose assets range up to hundreds of millions of dollars.

Over the years, Laird Norton has accumulated a level of experience and expertise which makes it one of the best wealth managers in Seattle and in the entire Pacific Northwest.

## **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firms in Washington State**

### **Full Range of Services**

A very attractive aspect of Laird Norton Wealth Management is that it provides a full range of services under one roof. Whether you need financial planning, investment management or trust services, these Seattle financial planners have you covered with your own three-person team (advisor, analyst, and associate).

Additionally, its larger size means that Laird Norton is able to offer some perks otherwise unavailable to investors, such as negotiated discounts on investments and preferred pricing. The fee structure gives clients unlimited access to advisors who are not paid hourly or by commission.

### **Accounting and Legal Expertise**

Everything done by Laird Norton on a client's behalf already includes tax planning, whether it's trust planning or minimizing taxes on investments. This top wealth management firm in Seattle provides clear tax reports at every quarter and year's end to both clients and the clients' accountants.

Additionally, this Seattle financial advisory firm has the knowledge needed to advise clients on the most suitable estate planning vehicles for their individual situations.

### **Wealth Regeneration**

[Wealth Regeneration®](#) is the name for this top Seattle wealth management firm's unique approach to wealth management. The approach brings together human capital and financial capital to create desired outcomes over the course of lifetimes and across generations.

The president and CEO of the firm, Robert Moser, has co-authored a book, titled *Wealth Regeneration at Retirement: Planning for a Lifetime of Leadership*, which is targeted towards wealthy baby boomers who find that traditional retirement may not be the path for them.

### **Expertise in Estate Transfers**

Laird Norton, through many years of experience working with high-net-worth clients, understands the ins and outs of maximizing wealth transfer between generations.

Their financial planners in Seattle can ensure that heirs have the resources they need, and help individuals leave philanthropic legacies through charitable annuities, foundations or charitable trusts.

Laird Norton happens to be the oldest independent trust company in Seattle and in the Pacific Northwest. This distinguished Seattle wealth management firm has helped hundreds of families find the best trust and estate planning options for their unique situations.

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## **Merriman Review**

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Founded in 1983, [Merriman](#) is a [fee-only](#) firm with a focus on long-term goals and smart investing.

This wealth management firm in Seattle seeks to bring its clients success and peace of mind by offering a comprehensive approach that involves not only investment planning but also tax planning, estate planning, insurance, risk management, and charitable donations.

### **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Washington State**

## Five-Step Process



Merriman's [five-step process](#) starts with a discovery meeting in which advisors get to know their clients' relationships, values, goals, resources, health, and interests.

After this in-depth introduction comes a strategy meeting where a custom investment plan is created with expert recommendations given by Merriman's experienced staff of financial planners in Seattle.

An implementation meeting follows. Here, final questions are answered by your Seattle financial advisors before the implementation of the plan begins. Advanced plan meeting and progress meetings follows afterwards to ensure that clients remain on track towards their financial goals.

Merriman's unique and clear multi-step program helps to give its clients peace of mind while simultaneously ensuring forward movement.

### Comprehensive Services

Like many larger firms, Merriman offers comprehensive services to its clients, including taxes, estate planning, insurance, risk management, and more. One of the biggest contributions that this Seattle wealth management firm makes to its clients is the ongoing assessment of each client's goals, needs, resources, and decisions.

Merriman seeks to evolve client portfolios in time with its clients' changing goals and plans.

### **Fact-Based Investing**

Merriman uses a fact-based investing approach which emphasizes three goals for long-term success:

1. Controlling risk
2. Careful choice of assets
3. A long-term approach

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

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## **Robinswood Financial Review**

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[Robinswood Financial, LLC](#) is a [fee-only](#), independent investment management and financial planning firm based out of Kirkland, Washington. The goal of this Washington financial advisory firm is to provide its clients with higher returns while ensuring maximum risk protection.

### **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Washington**

#### **Dedication to Clients**

Robinswood maintains a small client base because it believes that each client should be given the time and individual attention needed to devise a perfectly suited strategy. This Washington financial advisory firm is committed to building a personal relationship with each and every one of its clients through open communication and frequent updates on investments and portfolio performance.

The firm's strong dedication to its clients is made even clearer by [its pledge](#) to its clients.

## Pledge to Our Clients

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As your financial advisors, we pledge to:

- Adhere to the highest standards of ethical behavior and fiduciary responsibility.
- Employ a team of talented, hardworking, and friendly professionals.
- Communicate candidly with you regarding all aspects of your financial life.
- Help you set realistic financial goals and instill the discipline to achieve them.
- Always put your interests first.
- Accept no compensation that impairs our ability to give you unbiased advice.
- Continually educate ourselves regarding financial markets—both past and present.
- Remain vigilant about minimizing fund expenses, transaction costs, and taxes.
- Invest our personal assets in a manner consistent with your investments.
- Keep a long-term perspective.

### **Steady Hand**

The core of Robinswood's investment strategy is the use of institutional indexes and asset class mutual funds. While these are not get-rich-quick instruments, they minimize risk and produce better returns in the long run.

Robinswood is also one of the select fee-only advisors in Washington that are given [access to](#) Dimensional Fund Advisor's exclusive investment options.

### **Family- and Individual-Oriented**

This top wealth management firm in Washington State chooses to work with families and individuals rather than institutions because of its commitment to personalizing the investment management experience. It is one of the friendliest and most accessible firms on this list.

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## **Sovereign Wealth Advisors Review**

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[Sovereign Wealth Advisors](#) is an independent, fee-based advisor based in Bellevue. As one of the top financial advisors in Washington, it has been providing financial planning and wealth management services to the Pacific Northwest for over thirty years.

This Washington wealth management firm's clients come from a broad range of profiles and include everyone from young families to retirees, as well as corporate executives and small business owners, all of whom benefit from its comprehensive services.

## **Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Washington**

### **Comprehensive Services**

Sovereign Wealth Advisors targets broad financial goals, such as college funding, wealth accumulation, estate transfer retirement, and other life objectives. This wealth management firm in Seattle also has the expertise needed to deal with more specialized cases such as those involving the [following](#):

- Social Security and Medicare analysis
- Tax, estate, and legacy coordination
- Asset protection
- Stock option analysis for senior executives
- Business succession and continuation planning
- Analysis and coordination of illiquid assets
- Analysis of real estate holdings and transactions

### **Wealth Building**

Sovereign Wealth Advisors uses an overall investment strategy based on long-term returns and a minimization of risk. Its team of Washington financial advisors works with clients to identify their individual goals and tolerances to develop a fully-diversified portfolio suited to their needs.

The process of creating such a portfolio is highly personalized and designed to bring clients comfort and peace of mind that their assets are safe and in good hands.

### **Experience and Resources**

With over thirty years of experience, this financial advisory firm in Bellevue has the expertise needed to guide its clients through financial busts and booms using proven investment and financial planning principles.



This Washington wealth management firm's clients are given access to a variety of helpful tools:

- Leading financial planning methods for developing foolproof plans and strategies
- Expertise concerning all major financial areas, such as retirement planning, personal finances, tax planning, insurance planning, estate planning, and more
- Long-term financial counsel from advisors who make their clients a priority

***[Read More: Best Financial Advisors in New York, NY | Ranking | New York Wealth Management Firms](#)***

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## **Conclusion: Top Wealth Advisors and RIAs in Washington**

Now that you have read this list of the top Washington financial advisors in Seattle, Bellevue, and Kirkland, you should be better prepared to answer these questions:

- Where can I find the best financial planning, wealth management, and asset management services in Washington?
- Where should I go if I am looking for additional services like estate planning, tax management, and risk management?
- What types of fees do financial planners in Washington charge, and which financial advisor is best for me?

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

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

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## **AdvisoryHQ Disclaimer:**

Reasonable efforts have been made to present accurate information, however all info is presented without warranty. Review AdvisoryHQ's [Terms](#) for details.

Also review each firm's site for the most updated data, rates and info.

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