Top 7 Financial Advisors in Portland, Oregon

2016 RANKING OF TOP WEALTH ADVISORS

Top 7 Best Financial Advisors – Portland, Oregon | Ranking

Finding a top financial advisor in a city as diverse and broad-based as Portland can be a daunting undertaking – especially if you are unfamiliar with the financial and wealth management advisory landscape.

And when you are looking through databases of Portland-based financial advisory firms that offer a wide range of services, such as wealth management, financial planning, retirement advice, etc., it can add considerably to your challenge of finding the best Portland, Oregon financial advisor or wealth manager that is right for you.

The question "Who is the best financial advisor in Portland?" raises several other follow-up questions: Which Portland advisor should one choose? Where do you find a top wealth management firm in Portland? What do Portland financial planners charge (fees)? What services do they provide, and what can they do for you? And what criteria should you apply to finding a top advisor in Portland, Oregon that's just right for you?

Answering Your Questions – Finding the Best Portland, Oregon Advisors

AdvisoryHQ is committed to simplifying the research analysis that consumers conduct before choosing a top-notch advisor. We concentrate on conducting detailed comparison reviews and publishing these for free for anyone seeking a top performing advisor.

This review publication has been carefully developed to aid you in your search for a top financial advisor in Portland, Oregon.

So, while we cannot recommend “THE” advisor for you, we’ve provided you with enough information so that you can commence your search for the right one.

AdvisoryHQ's List of the Best Financial Advisors in Portland

1. **Beacon Rock Partners**
2. **Cedar Financial Advisors**
3. **Columbia Financial Advisors**
4. **Confluence Wealth Management**
5. **Interactive Wealth Advisors**
6. **Pacific Capital Works**

7. **Springwater Wealth Management**

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

Top 7 Financial Advisors in Portland, Oregon

(List is sorted alphabetically)

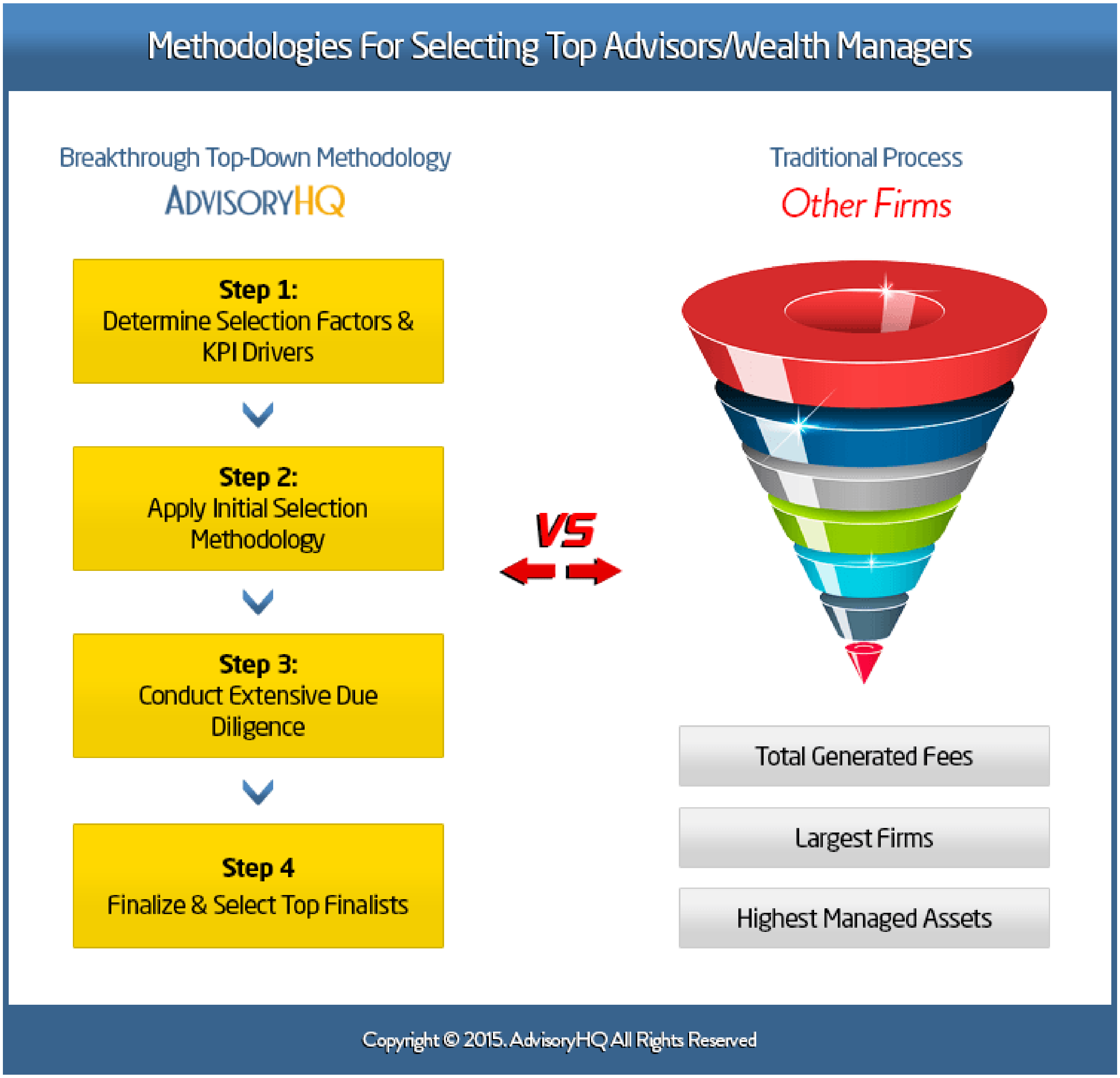
No.	Firm	Location
1	Beacon Rock Partners	Portland
2	Cedar Financial Advisors	Portland
3	Columbia Financial Advisors	Portland
4	Confluence Wealth Management	Portland
5	Interactive Wealth Advisors	Portland
6	Pacific Capital Works	Portland
7	Springwater Wealth Management	Portland

Selection Methodology – Financial Planners in Portland, OR

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

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



Detailed Review – Top Portland, Oregon Wealth Managers and Financial Planners

Below, we present a more detailed overview of the best financial advisors in Portland, including the many factors that allowed each firm to score so high in our selection ranking of the top ranking advisors in Portland.

Beacon Rock Partners Review

Beacon Rock Partners, a top rated wealth management firm in Portland, Oregon, specializes in personal financial planning, investment advisory, consultations, and investment counseling services.

Beacon Rock Partners is an independent, fee-only financial advisory firm with a unique set of insights from a variety of cross-disciplinary backgrounds.

Your relationship with Beacon Rock Partners begins with an invitation to you to visit the firm's office for a complimentary introductory meeting. During your introductory meeting, you'll discuss your financial and life goals and also get a detailed overview of the various services that the firm can provide to help you reach your financial goals.

The firm has a history of working with clients to create customized financial solutions tailored specifically to address their unique needs.

Cedar Financial Advisors Review

Cedar Financial Advisors is an independent, fee-only advisory firm – with the personal attention that only an independent, locally-owned company can provide. As a fee-only financial advisor, Cedar Financial Advisors does not accept commissions for financial planning products or referrals.

Since Cedar Financial Advisors is not affiliated with or a subsidiary of a large bank or insurance or broker-dealer deal, the firm is free to make recommendations from all possible sources and across all financial products. This allows it to recommend what is truly in your best interest.
Financial Planning Fees:

- On average, Cedar Financial Advisors' fee for a comprehensive financial plan is $5,000.
- Payment can be made in two installments, with one half due at the beginning of the engagement and the other half due upon completion of your financial plan.

Wealth Management Fees:

- The annual AUM fee is 1.0% for the first $1M, 0.75% for assets of $1,000,001 to $3M, and 0.5% for assets over $3M.
- Cedar Financial Advisors does not impose an account minimum for starting or maintaining an account, but it does have a minimum annual fee of $5,000 for wealth management services.
- Clients can also opt to get wealth management services under a retainer fee arrangement. The client will be charged an annual retainer fee that is agreed on by both parties.

Cedar Financial Advisors provides three key types of services: financial planning, retirement planning, and wealth management.

Note: Cedar Financial Advisors **is not currently** accepting new clients.

We are not accepting new clients at this time

Due to our desire to provide our existing clients with the highest level of service we have decided to stop accepting new clients at this time. We appreciate your patience and understanding. If you have other questions, send us your contact information and we'll get back to you.

Columbia Financial Advisors Review

Columbia Financial Advisors is unique in that it focuses on providing financial services to privately-held companies and their shareholders.

The firm was established in 1992 by a group of seasoned financial professionals and wealth managers.








As a company-focused (vs. individual-focused) advisory firm, Columbia Financial Advisors provides business valuation, tax-related, litigation support, and other business-related financial advisory services to business owners and shareholders, attorneys, accountants, ESOP Trustees, and others.

Although based in Portland, Oregon, Columbia Financial Advisors provides services to businesses and entities across the United States. Over the years, the firm has supported clients in executing hundreds of transactions across a wide range of industries including those below:

Columbia Financial Advisors is well-known across the industry for having a reputation of rigorous analysis, conclusions, and recommendations.

Confluence Wealth Management Review

Similar to other top ranking independent financial planners on our list of top Portland, Oregon financial advisors, Confluence Wealth Management does not sell products or accept commissions. The firm's fees are based on a fee-only structure.

Confluence Wealth is unique in that it is open to working with any professional financial, accounting or tax advisors you may already have to ensure that you are provided with a holistic and coordinated financial plan.

The firm is also invested in supporting and improving communities in and around Portland. See below for some of the organizations supported by Confluence Wealth:

PROFESSIONAL

- Estate Planning Council of Portland
- Chartered Financial Analysts Institute
- Financial Planning Association
- National Association of Personal Financial Advisors (NAPFA)
- Perkins & Co. Legacy Planning Group

COMMUNITY

- Cedar Hills United Church of Christ
- Friends of the Children
- Good Samaritan Hospital Foundation
- International Women's Forum Oregon (IWF)
- Loaves and Fishes
- Portland Business Alliance
- University Club Foundation Committee
- William Temple House

SPORTS, ARTS AND CULTURE

- Mazamas
- Multnomah Athletic Club
- Multnomah Athletic Foundation
- OSU Alumni Association
- Pacific Crest Trail Association
- Portland Civic Theatre
- Wildlife Safari

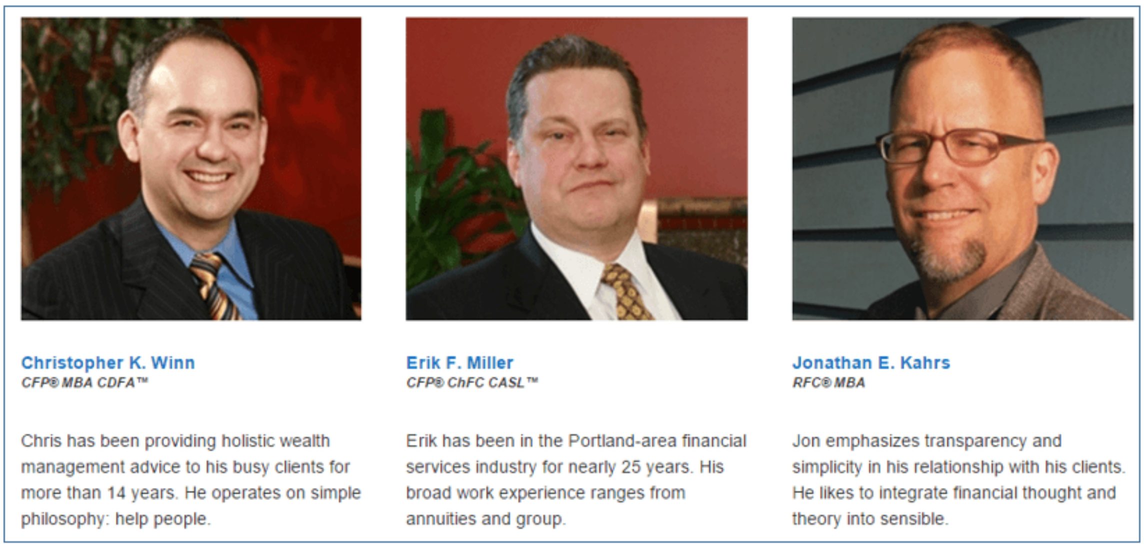
With decades of experience in the financial advisory and wealth management industry, Confluence Wealth Management professionals bring a wide range of expertise and passion to each client situation.

The firm is built on a strategy of providing a customized investment and financial planning approach to each and every client.

Interactive Wealth Advisors Review

Interactive Wealth Advisors is another top ranking wealth manager in Portland, Oregon. The firm provides financial advisory and planning services to communities in and around Portland.

As a fee-only Registered Investment Advisor (RIA), Interactive Wealth Advisors is legally required to always act in its clients' best interests.



Being a fee-only RIA, Interactive Wealth Advisors does not get compensated by the products it offers; rather it is paid by you, the client. Most importantly, you'll always know upfront exactly what you're paying the firm and don't have to worry about hidden fees.

The firm uses a multi-prong investment approach:

- It is a low-cost approach that seeks the lowest-cost investment solutions to help you meet your financial goals.
- It is an optimized and scenario-based approach that is structured using Modern Portfolio Theory (MPT) and market efficiency/equilibrium research. Using this approach allows Interactive Wealth Advisors to create well-balanced and optimized portfolios for its clients.

- It is a defensive strategy that uses options and derivatives to attempt to glean insight into future market direction. While the firm does not directly invest in these derivative products, using such a defensive strategy overlay allows it to preserve and grow more of your capital.

Pacific Capital Works Review

Pacific Capital Works is another top advisor on our list of top rated financial advisors in Portland. The firm works to provide holistic solutions to entrepreneurs, executives, key employees, and institutions.

Pacific Capital Works concentrates on the industries presented in the image below, and on clients who have concentrated equity stakes.

Pacific Capital Works, a registered investment adviser in Oregon was founded by Todd Brundage. Todd is also a contributor on the "Your Money" radio show – hosted by The Wharton School of Business and Sirius XM.

Wharton
University *of* Pennsylvania
BUSINESS RADIO ON SIRIUS XM

According to Todd, “We have stopped taking clients in 2015, but are setting up appointments with potential clients in 2016. We limit the size of that list and look for potential clients that are a good fit for our firm. That list typically fills during the year and we stop taking clients until the next year.”

Prior to establishing Pacific Capital Works, Todd was Vice President of Institutional Sales at D.A. Davidson. He founded Pacific Capital Works based on the idea that financial investment firms were out of balance and too focused on profits. He set out to create a holistic strategy that would provide a balance and help clients maximize their investments.

Todd began his post collegiate career as a US Army officer and was recognized for his distinguished service in the Gulf War.

Due to Pacific Capital Works’ independent structure, you won’t have to worry about conflicting or dependent relationships with other banking, insurance or global financial firms that would interfere with its ability to put your best interest first.

When it comes to its investing strategy, Pacific Capital Works *does not favor generic* levels of passive investing. Rather the firm subscribes to engineering portfolios with the concepts of modern portfolio theory.

When creating portfolios in public markets Pacific Capital Works applies a focused strategy using pre-defined managed investments (mutual funds, indexes, exchange traded funds (ETF) and bonds). Securities that follow a focused passive investment philosophy generally have low holdings turnover. As such, the fund expenses are generally lower than fees and expenses charged by other types of funds.

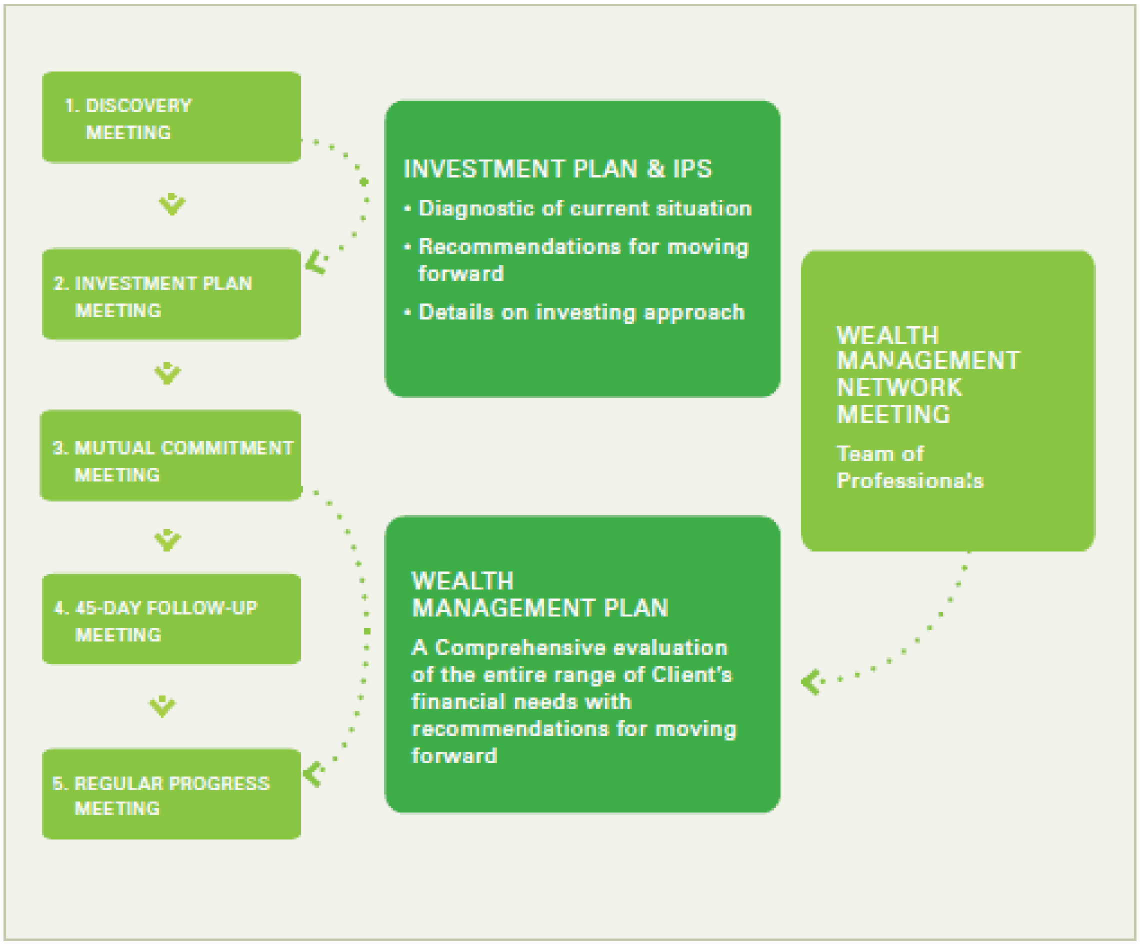
Another key factor that allowed Pacific Capital Works to be included in our top “Portland, Oregon wealth managers” list has to do with its fee and transparency structure.

Pacific Capital Works is a fee-only wealth management firm that only gets paid by its clients, and that fee is disclosed. The firm also utilizes a completely transparent approach to its business practices and investments.

With Pacific Capital Works, you don’t have to worry about confusing jargons or undisclosed concentrated positions. The firm puts you in complete control and works closely with you to help you achieve your financial goals.

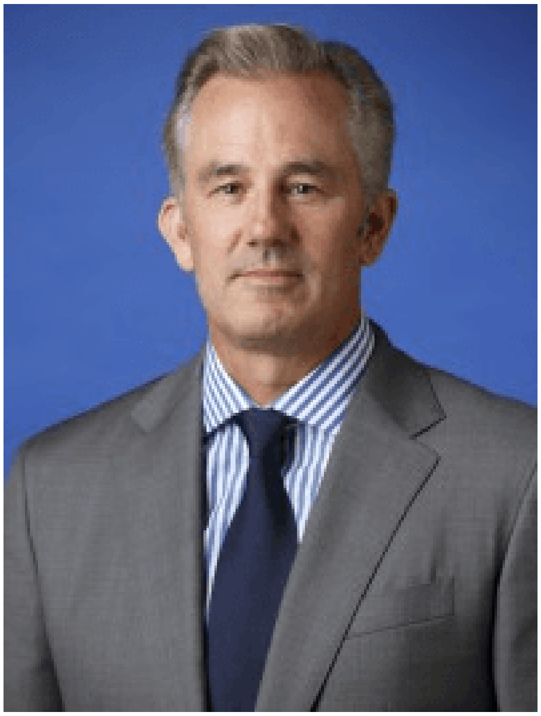
See below for additional information on the firm’s process:

In addition to managing clients' investment portfolios, Pacific Capital Works provides a thorough consultative process, utilizing a series of meetings to understand the client's needs and to design a portfolio and program that optimizes the client's goals. Following the initial consultative process, we continue to provide ongoing wealth management and relationship management services to clients through our team of experts incorporating the evolving and changing environment and goals. Such services may include retirement planning, charitable gift planning, college planning, risk management counsel, establishment of and counsel on retirement plans, and assistance with assets outside PCW's direct management.



Springwater Wealth Management Review

Springwater Wealth Management is a fiduciary financial advisory firm that was founded by Jim Corbeau (MBA and CFP®) and Terry Donahe (CFP®, CLU, and ChFC).



Jim Corbeau, MBA, CFP®
Principal and Co-Founder

Terry Donahe, CFP®, CLU, ChFC
Principal and Co-Founder

The firm only works with a limited and select number of clients. It provides financial education, advice, planning, and wealth management guidance to its client base and has a history of always putting clients' interests first – in a true fiduciary capacity.

Springwater's client relationships are mainly wealth management partnerships. This focus allows Springwater Wealth Management advisors to provide unlimited and as-needed financial planning, investment management, and retirement advice on an ongoing basis.

Springwater Wealth Management's Portland office building is conveniently located off Highway 217 in the Lincoln Center office complex.
The firm is also committed to supporting and improving communities in and around Portland by investing its time, resources, and talents.

Springwater Wealth Management is a true independent and fee-only wealth management firm and has offices in Portland, Oregon and Capitola, California.

Conclusion – Top 7 Financial Advisors in Portland, Oregon

Here are 6 tips on how you can leverage the information in this publication to find the Portland financial planner, wealth manager or financial advisory firm that is right for you:

1. First, you'll need to assess your financial goals and objectives. If you are part of an extended family seeking help from a qualified asset/financial advisor, you should conduct your self-assessment in consultation with other members of your family.
2. Review your list of financial goals and determine the top 3 services that you would like to see in your ideal financial advisor.
3. Next, review the list of top Portland financial advisors provided above and look for characteristics that might match the top 3 services/features on your list.
4. Drill down further by going over the information provided in the detailed advisor review sections of this article.
5. Once you have a short list of 1–3 financial advisors that meet your criteria, the next step would be to contact these advisors for an in-person consultation.

If you have questions, comments, or tips about this "Top 7 Financial Advisors in Portland, Oregon" 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

Image Sources:

- http://www.beaconrockpartners.com/
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- http://www.confluencewealth.com/our-company/our-senior-team/
- http://www.interactive-wealth.com/who-we-are/
- http://pacificcapitalworks.com/leadership/