

Top 8 Best Financial Advisors in Orlando, FL | 2017 Ranking | Orlando Area Wealth Management Firms

2017 RANKING AND REVIEWS TOP RANKING FINANCIAL ADVISORS IN ORLANDO, FLORIDA

Finding the Top Financial Advisors in Orlando, Florida

Orlando is known for many things. It's a tourist hotspot and a favourite destination for retirees. It's also located in one of the states that was [hardest hit by foreclosures](#) following the 2008 subprime mortgage crisis.

One of the things you may notice about all of these examples is that they are related to money. Families save diligently to take their children on a trip to Disney World and workers wonder if they've saved up to enjoy retirement. Don't even get us started on the amount of thought and anxiety that goes into investing or buying a home - two factors that played a huge factors during the Great Recession.

If you live in the Orlando area, hiring a financial advisor may be one of the wisest decisions you make. Taking the time to assess your current financial situation and plan for the future is a worthy investment of your time and money.

Of course, there is a lot of hesitation when it comes to choosing an Orlando financial advisor. Where do I start? How can I learn more about their values as a wealth management firm in Orlando in addition to their years of experience?

This is where AdvisoryHQ steps in.

Our reviews are designed to help narrow down your search for the best financial advisors and planners in Orlando. This article of the top 10 best wealth management firms in Orlando will reduce the amount of options you have to look through before selecting your ideal firm.



Award Emblem: Top 8 Best Financial Advisors in Orlando

AdvisoryHQ's List of the Top 8 Best Financial Advisors in Orlando, Florida

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

- **Allgen Financial Services – Financial Advisors, Inc.**
 - **AndCo Consulting**
 - **Certified Financial Group, Inc.**
 - **FirsTrust Private Wealth Management Group**
 - **Moisand Fitzgerald Tamayo, LLC**
 - **[Nelson Financial Planning](#)**
 - **Resource Consulting Group**
 - **WaterOak Advisors**
-

Top 8 Financial Advisors in Orlando, Florida | Brief Comparison

Financial Advisors in Orlando	Highlighted Features
Allgen Financial Services	Firm's outlined path to success
AndCo Consulting	Endowment and foundation services
Certified Financial Group, Inc.	Social Security Planning
FirsTrust Private Wealth Management Group	Trust and estate planning
Moisand Fitzgerald Tamayo LLC	Retirement planning
Nelson Financial Planning	Tax preparation
Resource Consulting Group	Seven Investment Fundamentals
WaterOak Advisors	Client-based timelines

Table: Top 8 Best Financial Advisors in Orlando | 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 Financial Advisors in Orlando, Florida

Below, please find the detailed review of each firm on our list of the best financial planners in Orlando. We have highlighted some of the factors that

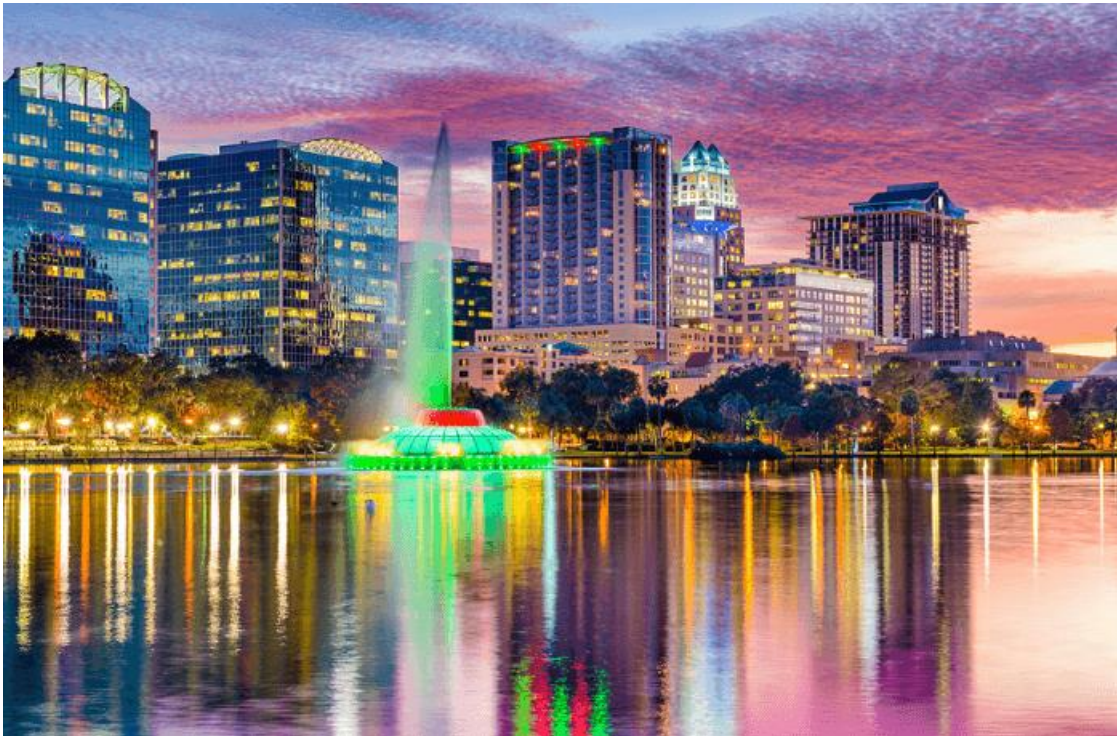
allowed these Orlando wealth management firms to score so high in our selection ranking.

[See Also: Top Financial Advisors in Dallas, TX | Ranking | Dallas Area Wealth Managers](#)

Allgen Financial Services Review

Headquartered right near Lake Lucerne in Orlando, Florida, [Allgen Financial Services](#) serves clients throughout the United States and abroad. This wealth management firm in Orlando provides highly-customized financial planning and management services to a variety of clients.

Allegen Financial Services is a [fee-based](#) wealth management firm in Orlando. We have included them on this list for the range of services they provide.



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

Listed below are key factors that allowed Allgen Financial Services to rank as one of this year's top financial advisory firms in Orlando, Florida.

The Path

Allgen Financial wants to help you design a path to success. No matter where you are on that path currently, this Orlando financial advisory firm has a roadmap to get you to the next stage. Here's a look at what it has outlined as the [three fundamental stages](#) of life:

- **Foundation**: If you find that you currently have no financial plan, no emergency fund, and a whole lot of debt, you may want to start here.
- **Formation**: Do you have your current finances under control but find the need to start looking into investments, retirement, or education planning for your children? This step allows you to maximize on what you already have.
- **Freedom**: Do you feel that you are already financially free? Allgen Financial can show you how to maximize your investments and minimize your tax liabilities to truly allow you to soar worry-free.

Comprehensive Financial Planning

How would you like to experience complete financial freedom? Perhaps you'd travel more, live more or have the opportunity to pay for your child's education. With a solid financial plan, you can. Allgen Financial seeks to replace your worry with joy. The following is this Orlando wealth management firm's approach:

- **Identify your goals**: Getting to know you and identifying your goals set a tone for the future and allows for a comprehensive plan.
- **Personalize a plan**: A personalized plan will be created for you to help you take charge of your money and reach your goals.
- **Monitor progress**: Your accounts are continuously reviewed and updated as needed.

Investment Management

Wealth is rarely built overnight. Through thoughtful investing, however, wealth can accumulate and set you up for a secure future. Allgen Financial has

a team of highly experienced financial advisors in Orlando who know how to invest on your behalf based on your specific needs and your tolerance to risk. To get started, your advisor will cover the [following](#):

- Profile, goals, timeframe, etc.: Just like with a financial plan, the first step is to understand who you are, what you want, and how you want to get there.
- Investments: Allgen Financial evaluates all investment options to find the best fit for you.
- Risk assessment: Prioritizing risk tolerance is essential to a successful portfolio.
- Screening: Allgen Financial routinely looks for investing opportunities that have the highest long-term returns and the lowest amount of risk.
- Your portfolio: After all considerations have been made, you will have a customized portfolio that is designed to outperform your risk profile and yield a high rate of return.

An Independent Firm

Allgen Financial is an independent firm, which means it is not beholden to external entities or parent companies. It is a Registered Investment Advisor (RIA) in Orlando which means it has a fiduciary duty to its clients.

[Don't Miss: Best Financial Advisors in New York, NY | Ranking | New York Wealth Management Firms](#)

AndCo Consulting Review

Some financial advisory firms operate independently while others foster an affiliation with a third party or a parent firm. [AndCo Consulting](#) is a wealth management firm in Orlando that believes all financial advisory firms should be independent in order to properly put their clients first.

This is why they strive to position themselves as an extension of their client's team. These financial advisors in Orlando want to be the first people current

and former clients choose to contact if there is ever a financial problem that needs to be solved or situation that needs to be addressed.

AndCo Consulting does not explicitly say that they are a fee-only or fee-based wealth management firm in Orlando. They write that they provide a “[hard dollar fee](#)” for their consulting services. As always, we advise readers to verify a firm’s compensation structure before starting a working relationship.

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

Listed below are key factors that allowed AndCo Consulting to rank as one of this year's top financial advisory firms in Orlando, Florida.

Investment Consulting

If you know what you’re doing, investing in the stock market can be an effective way to grow your wealth and protect it from inflation. If you don’t know what you’re doing and you’re the jittery type, it becomes a glorified game of gambling.

This wealth management firm in Orlando offers [investment consulting](#) for clients who want level headed advice and guidance about how to preserve their wealth for the long haul. These Orlando financial advisors supply “definitive recommendations and customized solutions” for their clients.

Additionally, they hold themselves accountable to the results, which is why they go the extra mile to ensure their financial advice is lined up with the financial goals of their clients.

These financial advisors in Orlando will help clients with the following:

- Governance
- Monitoring and risk oversight
- Education
- Strategic implementation
- Finding high quality investment options

Endowment and Foundation Services

This wealth management firm in Orlando does not restrict its financial advisory services to private individuals. They also help endowments meet their

budgetary requirements and ensure their longevity by putting together customized investment portfolios.

This financial advisory firm in Orlando counts colleges, universities, hospitals, and more among its institutional clients. Specific [endowment and foundation services](#) they provide include:

- Investment policy development and review
- Spending policy development and review
- Strategic asset allocation and portfolio structure
- Investment manager/strategy identification, evaluation, and recommendation
- Customized monthly, quarterly, and special request investment reports
- Quarterly economic summary
- Board/investment committee education
- Ongoing investment manager due diligence
- Professional service provider evaluation
- Special project coordination and execution

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

Certified Financial Group, Inc. Review

Florida is a perfect example of how you can enjoy financial success and financial turmoil. [Certified Financial Group, Inc.](#) is wealth management firm that understands you need advisors who can serve as guiding lights through the good times and the bad.

Certified Financial Group is located just outside of Orlando, in Altamonte Springs, Florida. This Orlando area wealth management firm offers financial planning and investment management services to a variety of families, individuals, athletes, and other affluent clients.

Certified Financial Group is a [fee-only](#) wealth management firm in the Orlando area.

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

Below are key factors that enabled Certified Financial Group, Inc. to be rated as one of this year's top financial advisory firms in and around Orlando, Florida.

Social Security Planning

Remember what we said about Florida being a popular destination for retirees? Well, if you are close to retirement social security is likely on your mind. A common myth about social security is that it is a straightforward process that can only be dealt with one way: You receive it, you spend it, and that's all she wrote.

Well, that *isn't* all she wrote. There are specific strategies retirees can use to properly allocate their social security so that they are not condemned to an uncomfortable retirement where they always have to glumly reply, "I can't. I'm on a fixed income."

Social Security is a unique retirement asset because it is annually adjusted for inflation, tax-advantaged, and pays out as long as you live. This wealth management firm in the Orlando area can help you maximize your Social Security income with their [Social Security Planning](#).

Creating a Financial Plan

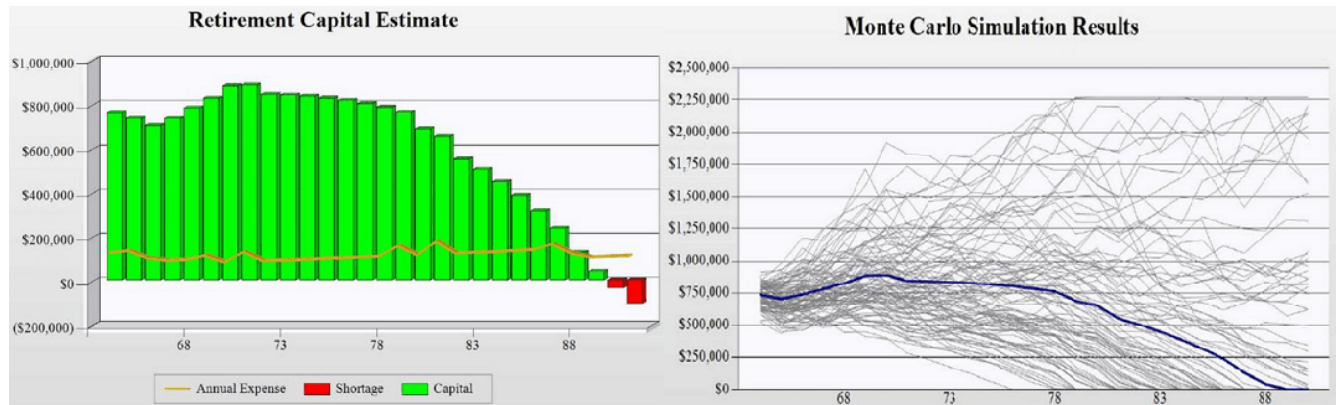
When working with one of Certified Financial's CFPs, you will have a clearer view of your current financial status. These Orlando-area financial planners will take well-defined action to help you meet all of your financial goals. The following is a list of the specific services they offer as part of their [financial planning](#) for clients:

- Retirement planning
- Investment management
- Social Security planning
- Risk management
- Tax and estate planning
- Cash flow and budgeting

An Eye on the Details

Once your successful plan is working hard for you, Certified Financial uses a cash flow planning platform that allows you a comprehensive overview of your money coming in versus your money going out. Next, it factors in existing assets, projected assets, taxes, and inflation to create a projection of what your money will do next.

There are many variables that can be applied with the use of this tool, and it's a neat way to stay on top of potential changes.



The Process

A comprehensive financial plan usually follows a predefined process to get you to where you need to be. These Orlando-area financial planners guide you through the [following steps](#):

- **Discovery:** A comprehensive study of your current financial situation starts things off.
- **Education:** You'll be presented with sound financial concepts and learn what they mean for you.
- **Planning:** Based on your personal choices, your plan becomes a blueprint for the future.
- **Implementation:** Once everyone is satisfied, an exciting plan is put into place.
- **Review:** A regular review of your finances allows you to stay on track.

Popular Article: [Best Financial Advisors in Seattle, Bellevue, & Kirkland WA | Ranking | Seattle Area Wealth Management Firms](#)

FirsTrust Private Wealth Management Group Review

[FirsTrust Private Wealth Management Group](#) is a proud provider of non-pushy financial advice. This wealth management firm in Orlando also has offices in Daytona Beach, Tampa, and Boca Raton as well as in Atlanta, Georgia. They offer financial planning services, investment management, tax management, trust and estate planning, and more.

FirsTrust is a [fee-only](#) wealth management firm in Orlando.

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

The following is a listing of key factors that allowed FirsTrust Private Wealth Management Group to rank as one of this year's top financial advisory firms in Orlando, Florida.

Fee-Only Service

Perhaps the biggest driving force behind FirsTrust is that it has a rock-solid commitment to serving your best interests regardless of what is trending in the industry. It does this by utilizing a fee-only structure that allows it the freedom to shop and compare multiple resources instead of worrying about pushing a specific product for a commission.

The FirsTrust Way

The following is an overview of FirsTrust's philosophy and what principles it stands by everyday:

- Avoid conflicts of interest
- A reputation of trust
- Consumer advocacy
- True independence
- A team of specialists
- Fee-only services

Appropriately Managed Investments

The first step is making sure the firm you work with has a compensation structure that does not lead to bias. The second step is ensuring the Orlando wealth management firm you select does not use a cookie cutter approach to investing. When structuring a client's investment portfolio, FirsTrust knows that no two clients are alike, therefore, no two portfolios can be built the same. With an initial focus on minimizing taxes, FirsTrust utilizes the widest selection of high-performing investments from across the globe.

Trust and Estate Planning

There are many factors that contribute to trust and estate planning. This wealth management firm in Orlando is equipped to deal with all facets of this area of financial planning including the [following](#):

- **Recent death**: During a difficult time, knowing what to do and what not to do are crucial. FirsTrust will sensitively streamline the administration of an estate.
- **Trust planning**: Considering that different states have different laws pertaining to trusts, FirsTrust's independent fiduciary advisors will assist you in selecting the best state (or country) in which to curate your plan.
- **Serving as a trustee**: Outsourcing the administrative duties of a trust can be wise. FirsTrust serves as your trustee and will handle all legal requirements.
- **Reducing taxes**: Prudent planning allows for a reduction in taxes, ones that can needlessly take a big chunk out of your estate. FirsTrust has saved its clients millions of dollars in unnecessary taxes.
- **Saving money**: A court-supervised probate becomes unnecessary with basic estate planning, which allows you to save greatly on fees and court costs.
- **Protecting assets**: There's no need to get an offshore trust to protect your family's assets. FirsTrust protects your money from being chipped away by creditors, lawyers, and divorcing spouses alike.

[Read More: Best Financial Advisors in Portland, OR | Ranking | Portland Wealth Management Firms](#)

Moisand Fitzgerald Tamayo, LLC Review

[Moisand Fitzgerald Tamayo, LLC](#) offers steady financial guidance through both calm and tumultuous economic periods. It offers financial planning and wealth management services to a variety of clients, from retirees and pre-retirees to trusts and those who have found themselves with sudden wealth.

Moisand Fitzgerald Tamayo is a [fee-only](#) wealth management firm in Orlando.

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

Below are key factors that enabled Moisand Fitzgerald Tamayo, LLC to rank as one of this year's top financial advisory firms in and around Orlando, Florida.

The Moisand Fitzgerald Tamayo Difference

The team at Moisand Fitzgerald Tamayo knows that no one can predict the future, but being prepared with a sound financial plan can alleviate the impact of negative economic conditions and reap the rewards of a positive financial climate.

The following is a [sampling](#) of what this wealth management firm in Orlando believes sets it apart from the rest of the noise:

- Independent fiduciaries: Moisand Fitzgerald Tamayo work for you and no one else. It is morally and legally obligated to provide you with honest advice that is in your best interest. No middleman or hidden agenda here.
- Disciplined: Your financial advisor evaluates all financial products, strategies, and investment opportunities with a skeptical eye. This has oftentimes proven to help a client avoid previously unnoticed risk and unnecessary loss.
- Investors, not speculators: Moisand Fitzgerald Tamayo doesn't play the market and doesn't gamble with your money. All decisions are soundly made and backed up with research.

- Well-qualified: With [six Certified Financial Planners \(CFPs\)](#) on staff, you stand to have a good bit of expert knowledge on your side.

Financial Planning

A sound financial plan includes recommendations in areas of interest to you. Success doesn't just come from chance or luck, but rather from a well-developed and appropriately implemented plan. These are some of the specific [financial planning services](#) that are offered:

- Cash flow management
- Risk management
- Tax planning
- Charitable giving
- Employee benefits and stock options
- Educational expense funding
- Estate planning

Your Retirement Plan

This wealth management firm in Orlando can help individuals prepare for retirement and answer some of the stress and confusion [questions related to retirement](#) like:

- How much money will I need to retire?
- Am I on track to retire when I want?
- What do I do if I am forced out of the workforce early?
- Will I live in this house for the rest of my life?
- What if the tax code changes adversely?
- How do I account for a possible inheritance?
- How much can I afford to give to charity?

Investment Goals

Through careful analysis, Moisand Fitzgerald Tamayo will create a detailed investment policy statement (ISP) that, among other things, will focus on the [following](#):

- The responsibility of your advisor and yours
- The types of investments to include or exclude
- The expected behavior of your portfolio
- Your investment goals
- What reports you should expect along the way

Your portfolio will be continuously monitored and, depending on the current economic environment, action will be taken as needed.

[Related: Top Financial Advisors in Ohio | Ranking | Ohio Wealth Management Firms](#)

Nelson Financial Planning Review

[Nelson Financial Planning](#) is a wealth management firm in Winter Park, Florida (right outside of Orlando) that specializes in retirement planning. They offer a holistic solution that brings together investments, tax management, and more to set clients up for a comfortable life in retirement. This financial advisory firm in Orlando was founded by Jack Nelson [in 1984](#).

Nelson Financial Planning does not refer to itself as a fee-only or a fee-based wealth management firm in the Orlando area. As always, we advise readers to verify a financial advisor's compensation structure before starting a working relationship.

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

Below you will find some of the key factors that enabled Nelson Financial Planning to rank as one of this year's top financial advisory firms in Orlando, Florida.

Holistic Financial and Retirement Planning

Nelson Financial Planning offers a holistic, client-centric approach to financial planning. It's all about the client's goals and dreams, and this Orlando area wealth management firm understands that.

Their goal is to make sure that every client has the information and guidance they need to feel in control of their finances and feel comfortable making decisions about their wealth management.

This Orlando area wealth management firm provides financial advice in the [following areas](#):

- Retirement income: Putting clients in a position where they can live comfortably in retirement
- Planning for retirement: Helping clients make the best planning and investing decisions today so that they can be secure tomorrow
- Investments: Assistance with selecting good investments that are aligned with a client's goals and objectives
- Taxes: Expert guidance through the complex tax system and advice minimizing one's tax burden
- Florida Retirement System: Discuss the benefits of enrolling in this system, how it affect your retirement options, and how to painlessly enroll if one chooses to

Tax Preparation

After investing anxiety, tax preparation and tax strategies cause a lot of stress for those who are actively trying to manage their wealth. Navigating the complex tax system, changing regulations, and multiple income streams can make tax time a nightmare. This wealth management firm in the Orlando area offers tax preparation services to ensure clients don't wind up paying more than they have to.

Nelson Financial Planning's tax preparation team has more than 30 years of experience helping people in the Orlando area. They can also help clients with their investment strategy while preparing their taxes. They offer quick, efficient services to minimize the stress and costs of tax time.

“Dollars and Sense” Radio Show

This wealth management firm in the Orlando area produces a radio show on a number of financial topics. Called Dollars and Sense, it is the longest running radio show in Central Florida with [more than 1,400 episodes](#). They cover everything from education savings to retirement planning, mortgages to taxes. The show even invites listeners to call in with questions.

Resource Consulting Group Review

[Resource Consulting Group](#) is a wealth management firm in Orlando that has brought together the key disciplines of risk management, philanthropic planning, taxes, estate planning, and investments to offer a fully integrated wealth management system to a variety of high-net-worth individuals and families.

It currently manages [\\$1.4 billion in assets](#) and proudly operates as an independent, [fee-only](#) firm.

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

Below you will find some of the key factors that enabled Resource Consulting Group to rank as one of this year's top financial advisory firms in Orlando, Florida.

Core Values

Resource Consulting stands behind a set of core values which it believes is essential in creating a lasting, positive client relationship. The [core values](#) outlined by this team of Orlando financial planners are:

- **Integrity**: Treating a client with honesty, integrity, and respect goes above all else. Resource Consulting works hard to gain and keep your trust, and it remains consistent in what it does.
- **Quality**: Resource Consulting's academic-based investment strategy, combined with its sound financial process, allows it to deliver superior quality at every angle.
- **Compassion**: Not only does the team believe in giving back to the community, it makes every attempt to reduce waste and conserve the earth's resources during work. It encourages its employees and clients to incorporate compassion into what they do as well.
- **Work/Life Balance**: Resource Consulting believes in fostering a client's peace of mind. By setting a high standard, it strives to provide the same life balance for its employees as it does for its clients.

The Seven Investment Fundamentals

In order to encompass a range of services, Resource Consulting has taken the most relevant investment objectives and created [The Seven Investment Fundamentals](#) to help clients avoid the dangers of the market.

- Have an appropriate allocation to equities: Properly allocated assets are the single strongest determinant of yielding high returns over the long term. In simple terms, don't put all your eggs in one basket.
- Stay fully invested: Timing your investments properly is key. Market timing can add uncertainty and reduce efficiency, both of which should be avoided.
- Keep costs down: Resource Consulting believes that the annual portfolio cost should be no more than 1%.
- Use only short-term bonds: These bonds offer less risk. Exposure to risk from long-term bonds only offers a small return.
- Include small cap stocks: Over time, small cap stocks garner higher returns than large cap stocks.
- Include value stocks: Value stocks also produce higher returns and allow for significant growth.
- Have broad diversification: No single investment strategy works all of the time. Reduce risk through the use of asset diversification.

The Systematic Financial Solution

Over the years, Resource Consulting has developed a number of unique planning methods. It has combined the best of these methods to create The Systematic Financial Solution, an integrated approach to setting goals, analyzing options, and implementing designs to maximize the probability of reaching your goals.



Retirement Planning Services

Retirement does not need to be complicated. In fact, simplicity is key. Resource Consulting offers transparent [retirement planning](#) for individuals and employees based on the following principles:

- **Simplicity**: Leave the complicated jargon at the door; simplicity is the way to go.
- **Plan wellness**: Increasing employee participation and encouraging employees to adequately fund their retirements ensure a steady income during retirement years.
- **Fiduciary assistance**: Resource Consulting can serve as your plan's ERISA, and it is the first firm in Florida to hold the CEFEX certification for fiduciary excellence.
- **Investment strategies**: Custom investment portfolios allow practical investing and the application of solid research.
- **Broad resources**: The Resource Consulting team is accredited and includes CPAs, MBAs, CFPs, and two attorneys to be on your side.

Popular Article: [Best Financial Advisors in Boston, MA | Ranking | Boston Area Wealth Management Firms](#)

WaterOak Advisors Review

[WaterOak Advisors](#) serves as an outsourced Chief Investment Officer for individuals, families, foundations, endowments, and institutions. This wealth management firm is located in Winter Park, right outside of Orlando, and holds over [\\$1.7 billion](#) in assets under management.

WaterOak Advisors is a [fee-only](#) wealth management firm in Orlando.

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

The following is a list of key factors that enabled WaterOak Advisors to rank as one of this year's top financial advisory firms in and around Orlando, Florida.

The Fee-Only Process

WaterOak Advisors operates independently as a [fee-only](#) firm. It takes its fiduciary responsibility to its clients very seriously, and it chooses investments that will work hard for you, not for its pockets.

Timelines for Private Clients

If you've never worked with financial advisor in Orlando or elsewhere before, it may feel overwhelming diving into the unfamiliar world of financial advisory services. This firm outlines the [experience](#) that both new and existing private clients will have while working with them.

New Client Experience

1. Initial meeting with portfolio consultant
2. Liquid asset analysis
3. Current portfolio analysis
4. Risk analysis
5. Investment plan

6. Implement portfolio
7. Client portal meeting
8. Wealth planning goal meeting
9. Tax analysis/projection
10. Wealth plan

Existing Client Experience

1. Portfolio review
2. Liquid asset analysis
3. Risk update
4. Review investment plan
5. Update balance sheet
6. Goals update/review
7. Tax analysis/projection
8. Wealth plan update

Timeline for Institutional Clients

Similar to the timelines for private clients, this wealth management firm in the Orlando area also offers a breakdown of the experience [institutional clients](#) can expect.

New Foundation Experience

1. Request for proposal
2. Review of existing Investment Policy Statement
3. Current portfolio analysis
4. Risk analysis
5. Investment plan
6. Publish updated Investment Policy Statement
7. Implement portfolio
8. Client portal meeting
9. Customized performance reporting

Existing Foundation Experience

1. Review/update Investment Policy Statement
2. Endowment landscape update
3. Quarterly performance reporting
4. Review investment plan
5. Strategic planning updates

6. Update committee membership
7. Review of spending policy

Essential Planning

This wealth management firm in the Orlando area offers what it calls "essential planning." Clients who want financial planning advice that cuts through the noise will appreciate this service that removes the complexity and integrates all the essential components of a client's life to come up with a suitable strategy. They use their trademarked Wealth Plus Consulting Process to provide comprehensive advice to clients of any asset size.

This Orlando-area financial advisory firm focuses on [three essential criteria](#):

- Goals planning
- Tax planning
- Estate planning

Conclusion – Top Financial Advisory Firms in Orlando, Florida

Now that you've had the opportunity to review our list of the top financial advisors and wealth managers in and around Orlando, Florida, you may have a good idea of which advisors will fit your needs the best, but there's still a bit of road left ahead.

Many financial advisors in Orlando offer free consultations to help you make sure that your potential advisor is indeed a good match. If the advisor you are leaning towards offers this, take advantage of it!

In the case that an advisor does not offer a consultation, you may still be able to get an answer or two, regarding your specific questions, by giving them a call. Most wealth management firms in Orlando should be happy to answer your questions. If they're not, perhaps that's a good indicator that you may want to take your business elsewhere.

Knowing what you want and aligning it with the services offered by each advisor on our list of the top financial advisors in Orlando will make your decision process much smoother. This is an exciting yet nerve-wracking time,

and we encourage you to exercise your confidence muscle as you get one step closer to financial freedom.

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.

Note: Firms and products, including the one(s) reviewed above, may be our affiliates. Click to view our [advertiser disclosures](#).

Image Sources:

- <https://www.resourceconsulting.com/services/financial-planning/>
- <http://financialgroup.com/the-financial-plan/>
- <https://www.bigstockphoto.com/image-123125195/stock-photo-orlando%2C-florida%2C-usa-downtown-city-skyline-from-eola-park>