Top 8 Best Financial Advisors in Portland, OR | 2017 Ranking | Portland Wealth Management Firms

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2017 RANKING & REVIEWS
TOP RANKING FINANCIAL ADVISORS IN PORTLAND, OREGON

Finding the Best Financial Advisors in Portland, Oregon

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.

Financial advisors in Portland offer a wide range of services. One top Portland wealth management firm alone may offer financial planning, retirement advice, investing strategy, and more. Parsing through all of these firms and services to find the best company for you can feel overwhelming.

And one simple questions like, “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? What services do they provide, and what can they do for you?

And overall, what criteria should you apply to finding a top advisor in Portland, Oregon that’s just right for you?

This review 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.

Award Emblem: Top 8 Financial Advisors in Portland, Oregon

AdvisoryHQ's List of the Top 8 Best Financial Advisors in Portland

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

- **Beacon Rock Partners**
- **Cedar Financial Advisors**
- **Columbia Financial Advisors**
- **Confluence Wealth Management**
- **Hausman Advisors**
- **Interactive Wealth Advisors**

- **New Outlook Financial, LLC**
- **Springwater Wealth Management**

Top 8 Financial Advisors in Portland, Oregon | Brief Comparison

Top Wealth Management Firms in Portland	Highlighted Features
Beacon Rock Partners	Complimentary consultation
Cedar Financial Advisors	Risk-centric retirement planning
Columbia Financial Advisors	ESOP valuation
Confluence Wealth Management	Wealth Lifecycle Planning
Hausman Advisors	Evidence-based investing
Interactive Wealth Advisors	Transition planning
New Outlook Financial, LLC	Socially responsible investing
Springwater Wealth Management	Divorce financial analysis

Table: Top 8 Best Financial Advisors in Portland, Oregon | Above list is sorted alphabetically

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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 Portland, Oregon

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

See Also: Top Financial Advisors in Dallas, TX | Ranking | Dallas Area Wealth Managers

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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 in Portland with a unique set of insights from a variety of cross-disciplinary backgrounds.

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

Free Consultation

Before you hand over your finances to any old wealth management firm in Portland, you want to get to know the people that will be working for you. Beacon Rock Partners offers a complimentary introductory meeting. This allows prospective clients to get a feel for these Portland financial advisors before signing anything.

During your introductory meeting, you'll discuss your financial and life goals and get a detailed overview of the various services that this Portland wealth management firm can provide to help you reach your financial goals. They'll help you make plans related to retirement, investing, saving, and insurance.

Client-Centric Financial Planning Services

The team of Portland financial planners at Beacon Rock Partners ensures that while handling the "complicated" stuff of your finances, they are communicating what is happening with your money in a clear and straightforward way. This balance between "hard" technical skills and "soft" people skills is vital for keeping clients comfortable and in the loop.

During your complimentary introductory meeting, a financial planner at this wealth management firm in Portland will discuss whether financial advisory services are right for you. That being said, there is no minimum amount of investible assets needed to work with these financial planners in Portland. Financial planning is done on a fixed, fee-only basis.

Specialized Consultations

Sometimes, your financial concerns don't fit neatly into a box or a category. This wealth management firm in Portland can help customers address unique financial challenges and answer specific questions. Some clients may simply need a second opinion while others may be interested in specific advice and guidance related to real estate transactions and stock option exercise.

Cedar Financial Advisors Review

Cedar Financial Advisors is an independent, fee-only wealth management firm in Portland. They provide the kind of personal attention that only an independent, locally-owned company can provide.

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 company, their financial planners in Portland are 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.

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

Financial Planning

These Portland financial planners help clients figure out where they want to go so that they can take the path that will get them there quickly and safely. Cedar Financial Advisors can help clients identify their goals and their aspirations in order to build a financial plan that is the most effective for their needs. When creating your comprehensive financial plan, the Cedar advisors will consider the following factors:

- Risk management
- Insurance
- Retirement planning
- Income tax planning
- Estate planning

Risk-Centric Retirement Planning

People often think that simply planning for retirement addresses the biggest risk (i.e. having no money in retirement). But there are often many challenges that can arise during the planning process. You may put together a plan for retirement, only to realize that it doesn't work when it's too late. Cedar's financial planners in Portland take these six risks into consideration when helping clients with retirement planning:

- Longevity: Outliving assets
- Health care expenses: The rising cost of healthcare and the need for more medical care in older age

- Inflation: Potential erosion of the value of the assets that you put away for retirement
- Asset allocation: A highly conservative portfolio puts a retiree at risk of outliving their assets
- Withdrawal rate: Ensuring the money is not depleted too quickly in retirement
- Sequence of returns: Withdrawing investments strategically by taking into consideration the sequence of returns

When you work with one of these Portland financial planners at Cedar, you will have a conversation about your dreams for life as a retiree and how to protect your assets as aggressively as possible from those six risks.

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

Don't Miss: Best Financial Advisors in New York, NY | Ranking | New York Wealth Management Firms

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Columbia Financial Advisors Review

Columbia Financial Advisors is a financial advisory firm in Portland that primarily serves privately held companies and their shareholders. This Portland wealth management firm was established in 1992 by a group of seasoned financial professionals and wealth managers.

It is unclear whether this wealth management firm in Portland is fee-only or fee-based.

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

ESOP Valuation

Columbia Financial Advisors' principals are nationally recognized professionals in Employee Stock Ownership Plan (ESOP) advisory and appraisal services. They have assisted several companies with ESOP transactions. Businesses that wish to acquire the services of this financial advisory firm in Portland can receive help with:

- Multi-investor transactions
- ESOP buying (or selling) a minority or controlling interest
- Corporate stock redemption or insurance
- Buyout of existing shareholder(s)
- Sub chapter S conversions
- Purchase or sale of an entire company

Tax Related Valuation

Taxes are no picnic for everyday individuals - that's why we have accountants. So it's only natural that a private company will need the expertise of a wealth management firm in Portland to sort through the legal and financial implications of their tax obligations. Columbia Financial Advisors provides valuations for the following tax purposes:

- Gifting
- Estate tax
- Charitable donations
- Recapitalizations
- S Corporation conversions
- Family limited partnerships

This Portland wealth management firm can also help companies deal with potential IRS audits or reviews.

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. This Portland wealth management firm's fees are based on a fee-only structure.

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

Wealth Lifecycle Planning

Confluence's wealth planning process is based on what is known as "the wealth lifecycle." A client's wealth lifecycle is divided into three stages: acquiring wealth, growing wealth, and securing wealth. These Portland financial planners help individuals protect their wealth lifecycle.

Once you've acquired wealth, either through an inheritance or through your business endeavors, it's a huge mistake to think that it means you will be wealthy forever. There is serious work involved in protecting and securing your wealth, which is why most high net worth individuals secure the services of a wealth managemnet firm in Portland or elsewhere.

Areas where this Portland wealth management firm can help you include:

- Financial planning
- Investment management
- Tax planning
- Risk management
- Retirement planning
- Estate planning
- Charitable gifting

Wealth Management

A Portland financial advisor at Confluence can help clients set up a robust wealth management strategy. This strategy will depend on your goals for your money and where you stand in the wealth lifecycle. Since this wealth management firm offers a number of diverse services, your advisor will help you determine what combination of services will best suit your needs and goals.

The great thing about this wealth management firm in Portland is that they are happy to work alongside any professionals that are currently advising you. They are committed to ensuring all elements of your wealth management strategy can work together smoothly.

Some of the services this wealth management firm in Portland offers includes:

- Asset allocation/investment strategy
- Cash flow management
- Charitable gifting
- Education planning
- Estate planning
- Income distribution
- Investment management
- Retirement planning
- Risk management
- Tax planning

Community Involvement

This Portland financial advisory firm is also invested in supporting and improving communities in the area. Some of the organizations they support include:

- Asian Health & Service Center
- Beaverton High School Fundraising Committee
- Boy Scouts of America
- OSU Alumni Association
- Legacy Health Foundation
- William Temple House

They are also involved in a number of business, sports, and arts organizations and initiatives.

Related: Best Financial Advisors in Austin, TX | Ranking | Top Austin Wealth Managers & Planners

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Hausman Advisors Review

Hausman Advisors is a wealth management firm in Portland that is dedicated to bringing financial clarity to clients' lives. Their mandate is to reduce financial stress, help their clients build confidence about their finances, and make financial decision making clearer and easier to understand.

Hausman Advisors is only a team of two, but we have included them on our list for the range of services they provide and the fact that they are a fee-only wealth management firm in Portland.

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

Wealth Management

Hausman Advisors calls itself your "Personal Wealth Engineer." It's a fitting name, since these financial advisors in Portland are responsible for puzzling out how to support your wealth and secure it so that it is preserved for both yourself and your family.

Their Portland financial advisors take the time to get to know you and your family, and come up with a detailed financial plan that can help you work towards your goals as well as:

- Enhance your wealth through strategic investments
- Protect your wealth through targeted risk management
- Transfer wealth through legacy planning
- Donate wealth through tax-favored charitable giving

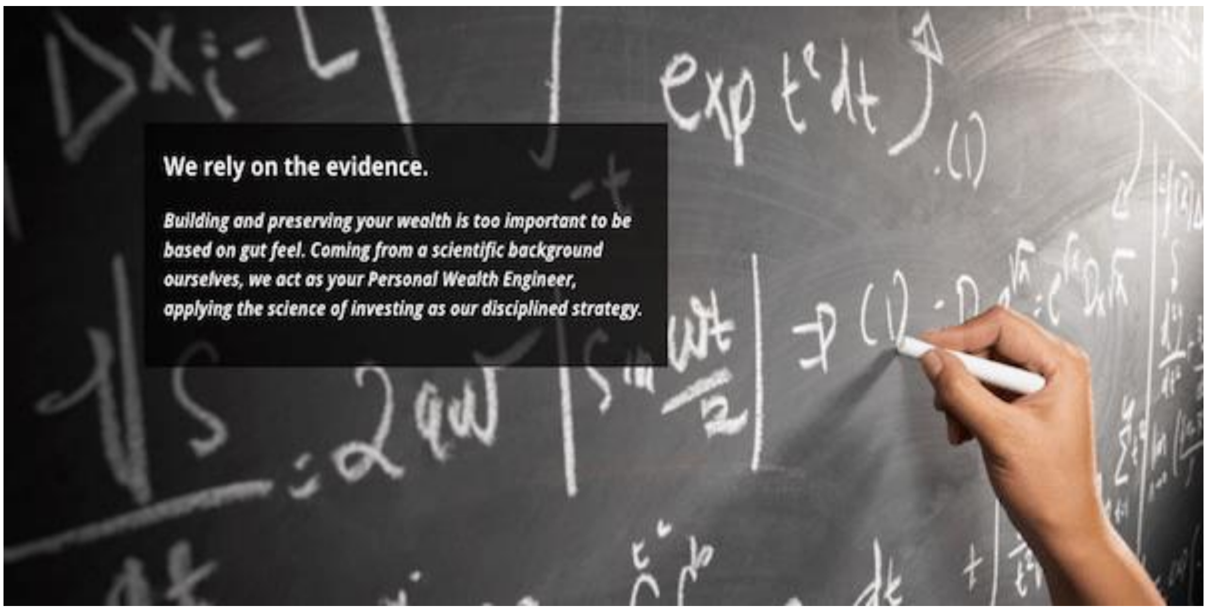
These financial planners in Portland also work together with other experts and even your own financial consultants, including accountants and attorneys, to make decisions that work in you and your family's best interests.

Evidence-Based Investing

An investor's worst enemy is often themselves. Emotion-based investing decisions often lead to catastrophic results. Trying to time and beat the market may work once in a blue moon if you are lucky, but it is not a sustainable long-term strategy if you are trying to grow and preserve your wealth. Scientific investing is what this wealth management firm in Portland emphasizes when helping their clients.

This wealth management firm in Portland concentrates on [evidence-based planning] that helps clients work steadily towards their long-term goals while minimizing the amount of risk involved. The fundamental tenets of this approach to smart investing are:

- Sound portfolio theory
- Sound portfolio construction
- Sound investment management



Specialized Planning

Like most wealth management firms in Portland, Hausman offers comprehensive wealth management services that provide each client with the core services they need to build and preserve their wealth. While this approach works for most situations, they are aware that sometimes there are unique circumstances.

Hausman is a wealth management firm in Portland that can work with clients to provide individualized solutions to unique problems. Sometimes, this unique circumstance is more unexpected than it is complicated like the death of a spouse or a career change. Whatever the case may be, these financial advisors in Portland come equipped with the expertise needed to help adjust a financial plan.

Some specialized services this Portland financial advisory firm provides includes:

- Imminent Issues: A pressing financial concern that has to be addressed before moving on to traditional financial planning and wealth management
- Family Steward Support: Certain family members may require more concentrated financial planning and support
- Exploratory Due Diligence

Interactive Wealth Advisors Review

Interactive Wealth Advisors is another top ranking wealth management firm 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 through the products it offers. Rather this wealth management firm in Portland 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.

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

Investment Management

Just because you have the money to invest, doesn't mean you're 100% certain about what you're doing. If you feel overwhelmed by investment decisions, your next investment should be to hire a Portland wealth management firm.

A financial advisor in Portland can help you answer nagging questions related to your investing strategy like:

- Is now the time when I should be buying or selling?

- Should I just sit tight and keep my investments in place despite what's happening in the markets?
- Is my current asset allocation in line with my short- and long-term goals?

A Portland financial advisor at Interactive Wealth can help you get the answers you need and secure your financial future with evidence-based investing advice.

Retirement Planning

People often think that retirement planning is all about putting away enough money for when they finish working. While this is a large part of the picture, it is by no means the entire picture. Exclusively focusing on this aspect can lead to difficulties in retirement.

The other important factor is how you will be *spending* this money in retirement. Figuring this out is easier said than done, because there are so many factors that are difficult to plan for. How will your investments perform? What kind of health care costs will you face? Will you need to go into a longterm care facility? How drastically will your assets be affected by inflation? And perhaps the most difficult question: Will I outlive my retirement funds?

The team of Portland financial planners at Interactive Wealth Advisors can help you answer all of these questions and prepare for a variety of retirement scenarios. They can also help you in the following areas:

- Tax-smart investing
- Establishing sources of retirement income (i.e. retirement plans, pension plans, Social Security)
- Spending plan that takes into consideration the standard of living you desire and potential market conditions
- Estate planning needs

Transition Planning

Some of the best financial plans are derailed due to dramatic life changes. When your personal life is thrown into turmoil, alerting your Portland financial advisor to your life changes as quickly as possible can ensure your financial life isn't thrown into chaos as well. The expert advice of a wealth management firm in Portland can help you make a sober assessment of your situation before making any catastrophic financial choices.

Interactive Advisors can help you financially navigate personal life events. Their Portland wealth managers can help you deal with:

- Sudden changes in wealth (for better or for worse)
- Marriage or divorce
- Birth or loss of a loved one
- Career changes
- Other instances of personal, financial, or professional upheaval

Popular Article: Best Financial Advisors in Seattle, Bellevue, & Kirkland WA | Ranking | Seattle Area Wealth Management Firms

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New Outlook Financial Review

New Outlook Financial is a wealth management firm in Portland that works with individuals, families, and small organizations to craft financial plans in order to meet their personal or business goals.

As a fee-only wealth management firm in Portland, New Outlook provides objective, independent advice that puts your best interests above any sales quota.

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

Financial Planning & Investment Advisory Services

This top wealth management firm in Portland offers comprehensive personal finance guidance to individuals from all walks of life. Their approach helps clients identify their goals and create a financial plan that is in line with their personal values.

Oftentimes, there's a fear that successful wealth management has to be divorced from a person's values, but the right wealth manager in Portland can help you make sure these two things work in tandem.

A few of the services this wealth management firm in Portlands provides are:

- Retirement Planning Strategies
- Cash Flow/Spending Planning
- Debt Management Planning
- College Funding Advice
- Stock Option Advice
- Pension Distribution Advice
- Life and Disability Insurance Needs Analysis
- A second opinion of your current financial plan
- Financial seminars

Socially Responsible Investing

Remember that bit about helping you manage your wealth in a way that aligns with your values? That was not simply a talking point. New Outlook provides what they call socially responsible investing. This wealth management firm in Portland helps clients grow their wealth without profiting from the success of companies that they are ideologically opposed to.

On the other hand, a client's goals may be more about helping companies they believe are contributing positively to society, and less about avoiding companies they don't like. Whatever the case may be, the financial advisors at New Outlook can conduct research to ensure that clients grow and preserve their wealth in an ethical manner.

New Outlook helps clients engage in socially responsible investing by focusing on the following factors:

- Research & Screening
- Community Investing
- Shareholder Advocacy
- Social Venture Capital

Commitment to Sustainability

It's only natural that a firm committed to helping clients invest in socially and environmentally responsible companies would be those things as well. New Outlook is a wealth management firm in Portland that has provided a detailed outline of its commitment to sustainability. They have made details of their action plan available on their website, and it includes the following:

- Using 100% recycled or FSC paper

- Minimizing the use of paper
- Bicycling or using public transporation
- Using Energy Star rated office machines
- Encouraging digital document exchange when appropriate
- Choosing sustainable vendors and suppliers where possible

Springwater Wealth Management Review

Springwater Wealth Management is a fee-only wealth management firm in Portland. They provide wealth management and financial planning services to clients, and their specialty is helping clients who have gone through a recent transition that may affect their financial situation.

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

Financial Planning

Springwater Wealth Management has a specific process for determining a client's financial goals and building their financial plan. A Portland financial advisor at Springwater will take a new client through the following steps:

1. Discovery
2. Modelling
3. Scenarios
4. Stress Testing
5. Putting It All Into Action
6. Keeping It Current

Not only does this process keep things organized, it also ensures that clients know exactly what is going on at every stage of the financial planning process.

Divorce Financial Analysis

Going through a divorce is already an emotionally traumatic experience. It can also be financially chaotic, and that only adds additional turmoil to an already unpleasant situation. A Portland wealth management firm can help you pick up the pieces of your finances during and after your divorce.

Among this staff of Portland financial planners at Spingwater Wealth are professionals with the CDFA certification, which stands for Certified Divorce Financial Analyst. Each professional who receives this designation is required to have a background in law or finance. They can help individuals save time, money, and energy by providing guidance in the following areas:

- Settlement negotiations
- Retirement options
- Spousal support/child support
- Tax implications of different scenarios

Educational Resources

Springwater Wealth offers a great educational resources page on their website to help clients learn more about financial planning and wealth management when they have the time. This wealth management firm in Portland takes things a step further by including educational resources in a vareity of formats including blog posts and videos. Their videos page includes topics like, "Can You Predict When To Buy & Sell Stocks" and "The Power of Markets."

Conclusion - Top 8 Financial Advisors in Portland, Oregon

Here are 5 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 offered by your ideal financial advisor.

3. 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.

Read More: ***Top Financial Advisors in Denver, Colorado Springs, & Boulder, CO | Ranking | Denver, Colorado Springs, & Boulder Wealth Managers***

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