

Top 9 Financial Advisors in Kansas City, Leawood, and North Kansas City

2016 RANKING OF TOP WEALTH ADVISORS

Finding the Top Financial Advisor in Kansas City, Leawood, Overland Park (KS), and other Cities in MO

The economy has been aptly described in the past as a roller coaster. You are guaranteed to hit the lows as well as the highs. There's no getting around it, which is why it pays to look for a top financial advisor in Kansas City and the surrounding area.

The financial advisors in and around Kansas City (MO) may be nearly 1,200 miles removed from Wall Street, but that doesn't mean Wall Street's influence doesn't reach the Heartland. To the contrary, market fluctuations are now felt globally, with investors on the other side of the world reeling from the repercussions simultaneously.

Without a good wealth manager in Kansas City, your assets will be increasingly vulnerable to an often chaotic market. Securing your wealth, planning for the future, and optimizing your investments are only a few of the necessary steps you'll need to take to weather the inevitable financial storms.

The good news is that there's hope, and it comes in the form of a solid, reputable wealth manager. In Kansas City and other areas, including Overland Park (15 minutes from Kansas City), Leawood, and North Kansas City, Missouri, we have pinpointed the ten best financial advisors.

If you value your hard-earned money and want to make sure your family, your loved ones, and your legacy are provided for, look over our

list of the best financial advisors in Missouri below. It has something for every serious investor.



AdvisoryHQ's List of the Best Financial Advisors in Kansas City, Leawood, North Kansas City, and Overland Park

- [Atwood & Palmer, Inc.](#)
- [Buttonwood Financial Group](#)
- [Frontier Wealth Management, LLC](#)
- [Mariner Wealth Advisors](#)
- [Nicholson Capital Management](#)
- [Sound Stewardship, LLC](#)
- [Sterneck Capital Management](#)
- [Sunrise Advisors, Inc.](#)
- [Windward Private Wealth Management Inc.](#)

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

Top 9 Financial Advisors in Kansas City, Leawood, and North Kansas City

Firm	Location
Atwood & Palmer, Inc.	Kansas City
Buttonwood Financial Group	Kansas City
Frontier Wealth Management, LLC	Kansas City
Mariner Wealth Advisors	Leawood
Nicholson Capital Management	Kansas City
Sound Stewardship, LLC	Overland Park
Sterneck Capital Management	Kansas City
Sunrise Advisors, Inc.	Leawood
Windward Private Wealth Management, Inc.	North Kansas City

Methodology: Finding the Best-Rated Financial Advisors in Kansas City, Overland Park (KS), and other Missouri Cities

What methodology did we use in selecting this list of best Kansas City financial advisors and top wealth managers in Kansas City, Leawood, Overland Park (KS), and other Missouri cities?

Using publicly available sources, AdvisoryHQ identified a wide range of financial advisors, asset and wealth managers, and financial planners that provide services in Kansas City 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 Kansas City, Missouri.



Detailed Review – Top Ranking Financial Advisors in Kansas City, Missouri

Below, please find the detailed review of each firm on our list of top advisors and financial planners in Kansas City. We have highlighted some of the factors that allowed these Kansas City financial advisory firms to score so high in our selection ranking.

Atwood & Palmer, Inc. Review

[Atwood & Palmer, Inc.](#) is a relatively small financial advisory firm in Kansas City, Missouri. The company was founded in 1990 by Bill Atwood and Steven N. Palmer. The firm's core ethics revolve around trust and respect for their clients and getting to know them before initiating any investment advice.

Since that time, the firm has relished its role as a boutique wealth manager in Kansas City whose staff remains small and personable to clients. Bill Atwood is no longer active in the day-to-day operations of Atwood & Palmer, but he continues to serve in a mentorship capacity to all of the firm's Investment Counselors.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Listed below are some of the features of Atwood & Palmer that merited the firm's inclusion on our list of 2016's top financial advisory firms in Kansas City.

Wealth of Services:

Atwood & Palmer is a financial advisor in Kansas City that has something for everybody.

They offer standard wealth management services that you would expect from a top Kansas City wealth management firm. If you're looking for an advisor to help with your retirement planning, then Atwood & Palmer can help you there, too.

They also give investment advice based around your needs and goals. Going beyond wealth management, Atwood helps you manage your estate and taxes, too, with the aim of developing a tax-efficient strategy that will lighten your tax burdens.

For those investors who are seeking to invest outside of themselves, Atwood & Palmer can help you plan your children's college funding as well as your philanthropic giving.

Small & Powerful:

Are you looking for a financial advisory firm in Kansas City that boasts low client-to-advisor ratios? Then Atwood & Palmer meets that need.

They are a boutique Kansas City financial advisor who gives you their full attention from day one. Atwood does not extend beyond the five Investment Counselors on staff. Counselors are not overloaded with clients, and as a result their time and availability do not become strained.

What does this mean for you? It means that when you hire an Atwood & Palmer to manage your wealth, you're hiring someone who will be there for you whenever you need. You will not be assigned to an assistant Investment Counselor or speak to your primary account manager once or twice a year.

Regular, Open Communication:

When you hire a Kansas City wealth management firm, you want to make sure of two things:

- They reach out consistently and regularly to discuss your portfolio.
- They are more than willing to hear from you when you have questions or concerns.

Atwood & Palmer joined our list of the best financial advisors in Kansas City because they are committed to both of these principles. Not only do they take the lead on contacting their clients, but they are always available when their clients want to initiate contact, too.

Top-Notch Website:

While you may have been told not to judge a book by its cover, a company's website speaks volumes about their business. With this in mind, one of the things that impressed us about Atwood & Palmer is their professional, top-notch website.

Many financial advisors burden their sites with complicated navigation menus or overly-long explanations of services. Other advisor sites are so bare-bones that they provide little to no feel for how they operate or their level of professionalism.

Not so with Atwood. Their site is clean, crisp, pleasing to the eye and extremely intuitive all at the same time. Their home page introduces you to the company with a bang by way of a short, 30-second video. From there, navigating the site couldn't get any easier.

Atwood & Palmer goes to great lengths to make sure your online experience with them is first-rate. It says a lot about how they want to make a great first impression as a top wealth manager in Kansas City.

Work on Fees, Not on Commission:

When you're searching for the best Kansas City wealth management firms, you want a company that is not predisposed to certain products or services based on potential revenue for themselves.

Instead, you want someone who only earns money based off the fees they charge you. No commission, no answering to a parent company, no quotas. Just a focus on you and your financial needs.

This is what Atwood & Palmer does, giving them the versatility to recommend any product or service to you from an objective, conflict-free perspective.

Customized To Fit You:

The Investment Counselors at Atwood & Palmer know their stuff. They know how to spot worthwhile opportunities and how to structure your portfolio around low-risk investments.

But this doesn't mean they default to certain assets or fall back on a stock portfolio. Rather, they collect all the pertinent info about your current financial situation. Then they factor in your needs and your goals for the future.

From there, they build a financial plan that takes into consideration where you are and where you want to be. You don't have to worry about being squeezed into someone else's plan, following market fads, or chasing short-term trends.

Atwood & Palmer gives you the individual attention necessary to craft a customized plan—one with a conservative approach that minimizes taxes and prioritizes your risk tolerance.

Credentialed & Experienced:

The Investment Counselors on the Atwood & Palmer team have over 100 years of combined experience. Combined with founder Bill Atwood's experience of almost 60 years, this makes Atwood & Palmer one of the most experienced financial advisors in Kansas City, Missouri.

That experience is strengthened by their education and credentials. Currently on staff are counselors who have earned their Masters of Business Administration as well as Chartered Financial Analyst designations. With Atwood & Palmer, you get counselors who have both the tenure and the know-how to effectively manage your wealth.

Buttonwood Financial Group Review

[Buttonwood Financial Group](#) is a Kansas City financial advisor that was founded almost a decade ago by Jon McGraw. McGraw started Buttonwood after witnessing firsthand his clients' displeasure when his employer was purchased by a large bank conglomerate. Since then, Buttonwood has grown to include several advisors, becoming one of the best Kansas City wealth managers.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Listed below are some of the features of Buttonwood Financial Group that merited the firm's inclusion on our list of 2016's top financial advisory firms in Kansas City.

Real Life Stories:

One of the standout features of Buttonwood's website is their focus on personal stories of financial success from real life clients.

The stories address popular concerns among most wealth management clients. One story, for instance, tells of a couple with divergent investment philosophies who managed to find common ground under Buttonwood's direction.

Another story tells of a family who had come into a great amount of wealth in a short amount of time. Unsure of what to do with their money, Buttonwood advised them on optimal investment strategies that preserved and grew their wealth.

These stories on Buttonwood's site speak to the firm's success in wealth management and financial consultation. It is one of the things that put them on our list of the top wealth management firms in Kansas City for 2016.

No Biased Advice:

Buttonwood's advisors are not obligated to push products on behalf of affiliates, outside organizations, or parent companies. They are 100% independent and conflict-free, two traits that guarantee you will receive unbiased advice. If they suggest additional products or services, you can rest assured they are doing so without ulterior motives.

Tailored Plans Across Several Services:

Buttonwood gets high marks as a wealth manager in Kansas City because of the array of services they offer.

Whether you're interested in getting your taxes in order or creating a plan for your estate, Buttonwood has you covered. The same is true if you need advice on maximizing your insurance, investments, or overall financial planning.

But no matter what service you choose, Buttonwood Financial Group tailors a plan to your needs. Each plan is customized and personal, giving you and your money the careful, individualized attention you're looking for.

Community Involvement:

Giving back to the community is a big part of Buttonwood's identity. They support local charitable organizations through both financial donations and volunteerism.

Donations are made via The Buttonwood Foundation, a private foundation which allocates a portion of Buttonwood Financial Group Revenue for charitable giving purposes.

Some areas of interest to The Buttonwood Foundation include:

- Arts
- Childhood abuse and recovery
- Disability services
- Environmental impact
- Education

Plentiful Resources:

Visiting Buttonwood Financial Group's website reveals how highly they regard client education. The *Resources* section of their site boasts a wealth of links for any investor with an interest in furthering their own knowledge.

The site features a *Monthly Focus* section that highlights an important topic that is close to investors' hearts, such as retirement planning, life insurance, and more. They also make available a wealth management blog with articles published regularly by Jon McGraw, Buttonwood's founder and president.

The *Resource Library* section features a link to helpful articles published outside Buttonwood's website. The link entitled *Education Center* takes visitors to a collection of informative articles on such topics as personal finance, investment planning, and insurance planning, among others.

Deliberate Planning with Ongoing Communication:

Buttonwood's financial planning process begins when you sit down with your advisor. They listen to your concerns and your goals, answer your questions, and explain their services.

After you decide that Buttonwood is right for you, your advisor draws up a plan for you to consider. This plan includes choice assets and strategies for maximizing your investments.

Based on your feedback, Buttonwood either revises your plan or implements it. However, Buttonwood is committed to getting the process right, which means confirming that you're fully comfortable with the plan that is drawn up for you. Then, and only then, will Buttonwood proceed with putting your plan into action.

After that, you meet with your advisor at a minimum either semi-annually or quarterly. Because of Buttonwood's commitment to client satisfaction and doing what's best for you, however, they will meet with you on a more frequent basis if you wish.

Frontier Wealth Management, LLC Review

[Frontier Wealth Management, LLC](#) is a family-owned Registered Investment Advisor in Kansas City, Missouri, that was founded in 2007. It has four main offices throughout the Midwest along with satellite offices in the Midwest and Southwest.

Noteworthy among Frontier's many excellent features is its division of labor. Advisors work one-on-one with clients while being supported by a team of Specialists.

Specialists are experts in their given field, helping to optimize and refine the plans that Frontier crafts for its clients. This two-pronged system makes Frontier unique among Kansas City Registered Investment Advisory firms.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Listed below are some of the features of Frontier Wealth Management that merited the firm's inclusion on our list of 2016's top financial advisory firms in Kansas City.

No Hidden Interests:

Frontier Wealth does not have any hidden interests when it comes to helping you manage your wealth. They are an independent Registered Investment Advisory firm in Kansas City whose complete focus is on you, the client. They do not push products or services on you to fatten their bottom line.

Work as a Team:

Frontier employs Specialists who support their Financial Advisors to assist you in every facet of your financial plan.

From estate planning to tax planning, and from investment strategies to insurance planning, Frontier's team puts their collective knowledge to work in rounding out your plan.

Because of Frontier's team-oriented approach, they can provide a suite of comprehensive, harmonized services. Moreover, each Specialist will drill down further into their specific concentration, giving you a more profound level of expert advice than what you'll find at most financial advisory firms.

As a result, your plan will be a precise reflection of your needs while better serving you in reaching your goals.

The Utmost in Transparency:

Frontier holds themselves to a higher standard than what you'll find in run-of-the-mill Kansas City financial advisors. They are dedicated to being accountable to you, the client, in everything they do.

Whether fee structure, the recommendations they make, or the plan they devise for you, Frontier commits to staying out in the open with nothing to hide. You don't have to fret about hidden fees or surprise moves. Frontier fosters real relationships built on honesty and trust.

Open & Engaged:

In keeping with Frontier's willingness to be fully accountable to clients, they answer the call to stay engaged with them, as well.

Frontier wants to know what's on your mind. For this reason, they are open to hearing from you whenever you have a question or concern regarding your financial plan.

Frontier does more, however, by staying engaged with you along the way. They are proactive in reaching out to you and listening to your needs.

Helping Children in the Community:

Frontier practices regular charitable giving to hospitals in communities across Kansas City. Their giving supports initiatives aimed at helping children, including improving their quality of life and health and assisting their families.

Suite of Services:

Frontier offers a range of services with the goal of providing a comprehensive wealth management plan to its clients.

If you're in the market for financial planning, Frontier provides you with a thorough, customized plan built around you. Frontier's tax planning takes stock of your investment strategies and determines how best to make your plan tax efficient. Frontier also offers corporate retirement planning for businesses.

The hallmark of Frontier's asset allocation strategy lies in their ability to advise on alternative investments. In addition to conventional assets, Frontier can help you diversify with private equity, hedge funds, venture capital, and real estate.

Mariner Wealth Advisors Review

[Mariner Wealth Advisors](#) is a Kansas City-area Registered Investment Advisor located in the suburb of Leawood. They primarily serve high net-worth individuals and their families, corporate executives, business owners, and foundations.

Mariner's specialty is wealth management, but they also enjoy conflict-free partnerships with outside asset managers.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Listed below are some of the features of Mariner Wealth Advisors that merited the firm's inclusion on our list of 2016's top financial advisory firms in Kansas City.

A Partner in Planning:

As a fiduciary and Registered Investment Advisor, Mariner is legally obliged to provide you financial advice that serves your interests and only your interests. At no time are they allowed to provide biased financial advice designed to profit their firm. Mariner can only succeed when your goals are met.

Advice That Is Conflict-Free:

In keeping with their status as an RIA that is solely committed to your bottom line, Mariner Wealth Advisors operates conflict-free.

When you hire Mariner, they won't advise you on products or services that aren't necessary or that don't benefit you first and foremost. Additionally, Mariner and its advisors cannot earn commission or bonuses from the sale of any extra service. This ensures that you receive objective, unbiased advice.

Comprehensive Wealth Management:

Whereas most financial advisors offer a handful of services, Mariner Wealth Advisors opens up an array of options for its clients.

A list of Mariner services includes:

- Financial planning
- Tax planning & accounting
- Family services for high net-worth families, such as concierge services and lifestyle management
- Trust planning
- Insurance planning for individuals, families, and businesses
- Investment planning
- Philanthropic giving

The Mariner Foundation:

The employees of Mariner Wealth Advisors fund a charity called The Mariner Foundation. The Foundation is overseen by a seven-member board that organizes its charitable giving.

The Mariner Foundation's mission is to assist underprivileged families across the Kansas City area, suburbs, and the communities of its partners across the country. To that end, Mariner employees donate

money to the Foundation while Mariner Wealth Advisors matches each donation amount.

In addition to financial giving, Mariner employees also volunteer their time to local organizations. Some of these organizations include Boys & Girls Club, Habitat for Humanity, Ronald McDonald House, Big Brothers and Big Sisters, and more.

Nicholson Capital Management Review

[Nicholson Capital Management](#) is a Kansas City financial advisory firm established in 1988, making it one of the oldest wealth management firms in Kansas City.

The Nicholson team combines more than 60 years of experience in the financial advisory and wealth management arenas. Nicholson's specialty is wealth management, retirement plan sponsors, legacy services, and financial consulting for both individuals and institutions.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Listed below are some of the features of Nicholson Capital Management that merited the firm's inclusion on our list of 2016's top financial advisory firms in Kansas City.

A Pioneering Founder:

In 1988, Jennifer D. Nicholson became one of the first women in Kansas City history to establish an independent financial advisory firm. Ten years later, she took over as owner and renamed the firm Nicholson Capital Management.

Prior to founding her firm, Jennifer Nicholson entered the financial services industry in 1972 as the first female management trainee for the First National Bank of Kansas City. She later blazed more trails when she was promoted to Vice President and Group Leader in the bank's Trust Division.

Custom Plans with Specific Investments:

Nicholson likes to think of their advisory services as “transformational, not transactional.” This simply means that they “sit on the same side of the table” as you to create a plan that fits your goals and risk tolerance. They don’t help just clients to increase their own bottom line but to increase your rate of return.

To that end, Nicholson invests in ETFs (Exchange Traded Funds), individual securities, and no-load mutual funds.

Fee-Based, No Selling:

Unlike many other financial advisors, the team at Nicholson Capital Management does not sell you products. They earn only an annual fee that they disclose to you upfront before services are rendered. In this way, you can trust Nicholson to be working for you rather than waiting to upsell you down the road.

Consistent, Two-Way Contact:

One of the things that helped Nicholson make our list of top financial advisors in Kansas City was their open door policy.

Not only will Nicholson regularly keep in touch with you, but they encourage you to contact them any time you need. You won’t get shuffled around to assistants or leave multiple unreturned voicemails. Their boutique size and low client-to-advisor numbers ensure that the advisors at Nicholson will be available to address your concerns in a timely manner.

In addition, Nicholson sends monthly statements to keep you abreast of your investment performance. They also submit reports, educational articles, newsletters, and market analysis to clients on a consistent basis.

Help During Personal Crisis:

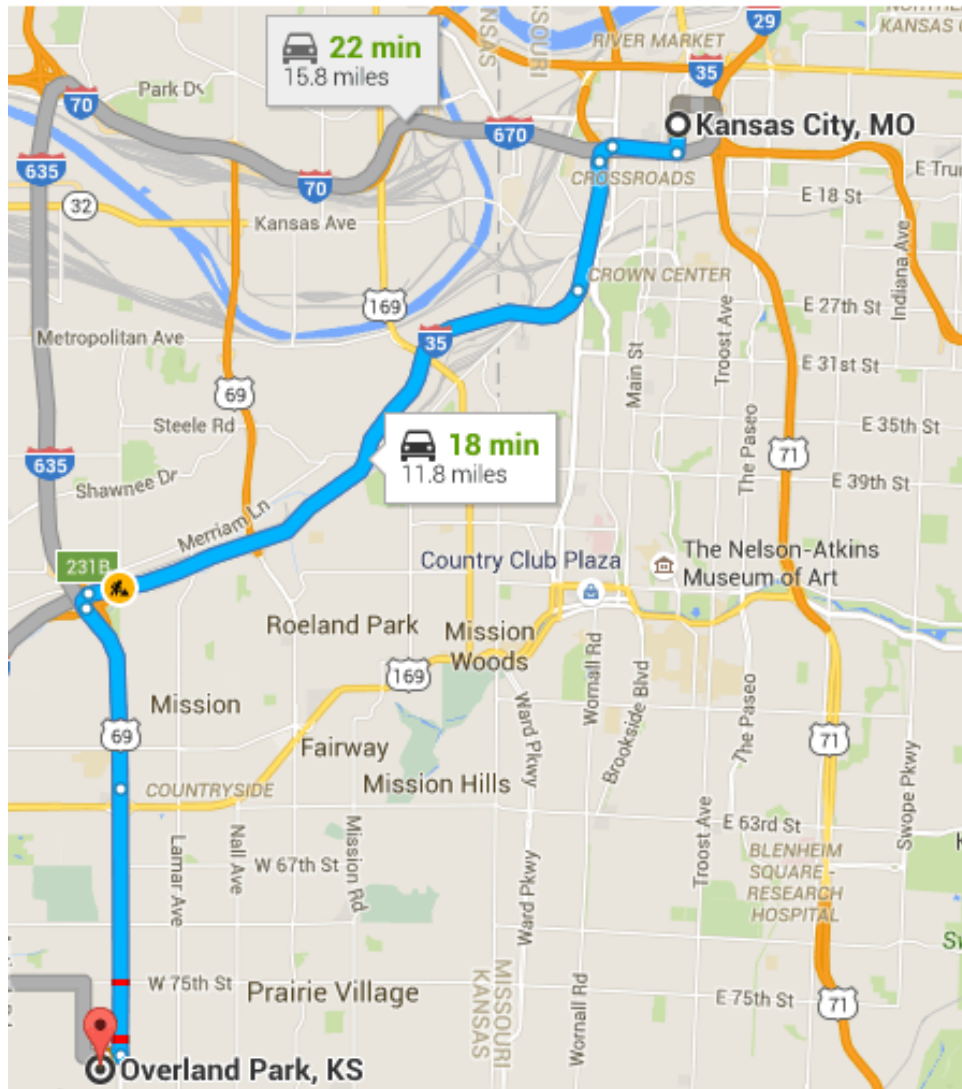
Nicholson Capital Management made our list of the best financial advisors in Kansas City for many reasons: Fee-based structure, open-door policy, resource availability, and more. But one of the firm’s emphases that we particularly appreciated came in the form of their Legacy Services division.

With Legacy Services, Nicholson assists spouses and children who have lost a loved one. This includes helping to resolve bills, handle finances, minimize surprise expenses, distribute trusts, transfer privately-owned businesses, and more.

Nicholson understands that the tragedy of losing a family member can make life chaotic and confusing. They vow to stand beside you to help make the hard times a little easier.

Sound Stewardship, LLC Review

[Sound Stewardship, LLC](#) is a suburban Kansas City wealth management firm in Overland Park, Kansas. Although located in the state of Kansas, the firm was included in this review of top Missouri advisors based on its close proximity to Kansas City (~20 minutes' drive).



Sound Stewardship’s motto is “Financial planning for purposeful livingSM.”

Their objective is to help clients make their dreams a reality while positively impacting the world around them at the same time. This stems in part from their focus on biblical values, as seen in their portfolio classification between Socially Responsible portfolios and Biblically Responsible portfolios.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Listed below are some of the features of Sound Stewardship that merited the firm's inclusion on our list of 2016's top financial advisory firms in Kansas City.

Staying in Touch:

Some financial advisors take your money, build and implement your financial plan, and then leave you twisting in the wind until your semi-annual meeting. When you call for an update on your account, you have to settle for speaking with an associate who isn't as familiar with your financials.

But fortunately for you, Sound Stewardship doesn't work that way. They reach out to you regularly with updates about your account. Not only that, but as your circumstances change, Sound Stewardship wants to help you adjust your investment strategies and financial planning accordingly. With Sound Stewardship, communication flows freely in both directions.

Independent, Fee-Based Company:

Sound Stewardship is an independent financial advisor. They make their own policy and decisions void of conflict-of-interest.

As such, their employees do not accept incentives or commissions when it comes to instituting any client plan. At other financial advisory firms, you might have reason to worry if you're being coaxed into a product or service that you really don't need.

But with Sound Stewardship, the only thing you'll receive is objective, unbiased advice you can trust. This puts them squarely on our list of the top financial advisors in Kansas City and suburbs.

Comprehensive, Customized Financial Planning:

Sound Stewardship offers services under two primary categories: financial planning and wealth management.

While these are staples among most financial advisors in Kansas City and the surrounding area, Sound Stewardship steps their game up a notch when it comes to their comprehensive financial planning service.

There's a reason that Sound Stewardship calls their process *comprehensive* financial planning. They meet with you and evaluate your financials in no less than 14 different areas. The 14 items that Sound Stewardship analyzes include:

- Cash flow & emergency reserves
- Net worth
- Major purchases & liquidations
- Retirement planning
- Tax planning
- Investment strategy, analysis, and management
- Insurance analysis
- Education planning
- Estate planning, including survivor support & wealth transfer
- Special needs planning for loved ones who have disabilities
- Philanthropic giving
- Credit review, including identity theft considerations
- Business planning, including succession
- Disaster preparedness

Such a thorough review warrants the name “comprehensive,” and it is one of the most comprehensive you’ll find of any investment strategy firm.

Purposeful Living Process:

Sound Stewardship’s *Purposeful Living Process* is a five-part timeline designed to help both you and the firm gain a firm grip on your financial needs and goals.



The steps included in this process, in order, are as follows:

- **Life Impact Discovery**
- **Stewardship Accounting**

- **Meaningful Transformation**
- **Impact Alignment**
- **Lasting Significance**

Each phase of the process has a different objective. For instance:

- The **Life Impact** phase is meant to help you organize your thoughts regarding the kind of impact you wish to leave. Of special emphasis in this phase is how your wealth and financial resources contribute to that legacy.
- During **Stewardship Accounting**, your advisor at Sound Stewardship assists you in drawing an accurate “big picture” of your financial health. Sound Stewardship also analyzes weak spots in your finances as well as what has been successful.
- The **Meaningful Transformation** phase uses the first two phases as a springboard in creating your financial plan. In this way, your plan is informed by a realistic, fact-based understanding of where you stand financially and what needs to change for you to reach your impact goals.
- Once you have your personal affairs in order, the **Impact Alignment** phase involves taking the next step to how you’ll use your wealth to benefit others. Ideally, these benefits will start in your lifetime while also extending beyond you.
- **Lasting Significance** is the fifth and final phase of the process. This is essentially the maintenance stage of your investment strategy. It involves both you and your Sound Stewardship advisor reviewing your account on a regular, consistent basis to evaluate your investment performance and make necessary changes.

Sound Stewardship Principles:

By now, it seems everyone should know the basics of sound money management. Don’t spend more than you have, for instance, and save up some money for emergency situations.

But at Sound Stewardship, they do more than give lip service to these ideas. Instead, they formed their entire philosophy around them, and each client financial plan is crafted according to the same ideas.

Sound Stewardship calls these ideas *Sound Stewardship Principles*. They include:

- Live within your means
- Avoid going into debt
- Save for emergencies
- Think long-term
- Diversify
- Keep others in mind
- Be generous

Sterneck Capital Management Review

[Sterneck Capital Management](#) is a Registered Investment Advisor in Kansas City, Missouri. The firm first formed in New York City, founded by Frank M. Sterneck. Sterneck relocated the company to Kansas City in 2001.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Listed below are some of the features of Sterneck Capital Management that merited the firm's inclusion on our list of 2016's top financial advisory firms in Kansas City.

Hold to Fiduciary Standard:

Sterneck Capital holds itself to the fiduciary standard when managing your money. They submit themselves to your best interests, working together with you to achieve your success.

As a result, they are completely open and transparent, and they will not recommend products, services, or affiliates based on commissions or incentives. Additionally, they will not invest your money in a way incongruent with your risk tolerance.

Experienced & Established:

When you invest your money, you want to entrust someone who knows what they're doing. Preferably, an advisor or firm that has years under their belt and an expansive knowledge of wealth management.

You'll get just that with Sterneck Capital. Their advisors boast more than 120 years of combined experience, putting them vastly ahead of most Kansas City financial advisors in terms of years in the industry.

What's more, Sterneck itself has been in business for more than 25 years. Not only do you get experienced advisors with Sterneck, but you get a stable, established firm that you can trust.

Personalized Process:

Each investor's needs are different, as are their individual financial standings. Because of this, the advice given to one client will not necessarily work for another.

Sterneck understands this, which is why their financial plans are personalized and tailored to each client. To guarantee that each plan addresses each relevant area of a client's life, Sterneck helps them through a discovery process.

The discovery process is made up of five parts:

- Sterneck **evaluates** your financial posture, analyzing your needs, assets, and portfolio.
- The firm then **assesses** your risk tolerance.
- They **balance** your risk tolerance with the appropriate amount of risk needed to meet your goals.
- Next comes **crafting** your personalized portfolio along with your implementation plan. Sterneck focuses on undervalued securities while identifying proper entry/exit points.
- Sterneck then **monitors** your portfolio. This includes actively managing your accounts and initiating regular comprehensive reviews.

Sunrise Advisors, Inc. Review

[Sunrise Advisors, Inc.](#) is a Kansas City Registered Investment Advisor (RIA). They were established in 1993 and have been family-owned through multiple generations.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Listed below are some of the features of Sunrise Advisors, Inc. that merited the firm's inclusion on our list of 2016's top financial advisory firms in Kansas City.

Fee-Only & Fiduciary:

Sunrise Advisors pride themselves on doing what's best for you. They operate according to the fiduciary standard and operate accordingly under a fee-only structure.

When you hire Sunrise, you hire a firm that works above-the-board and in full transparency. Their legal obligation is to benefit you, not to line their own pockets at your expense. To that end, they'll be honest and upfront with you every step of the way.

Independent Structure:

Sunrise works alone, not under the auspices of a parent company. Nor are they contracted to market the services or products of a sister or founding institution.

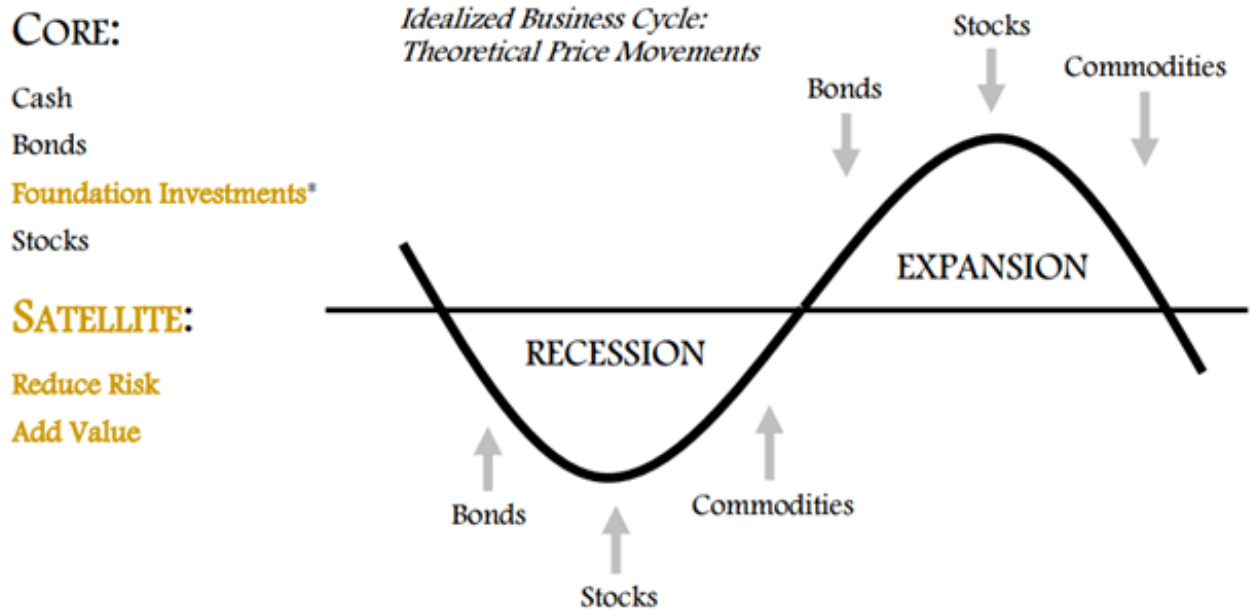
Because of this, they guarantee that no outside influence will be exerted on their recommendations at any time. The advice you receive from Sunrise advisors will be unbiased and centered around your needs.

Two-Tiered Investment Approach:

Most investment management firms focus on the same stable of assets, such as bonds, stocks, and commodities. Thus, as the market contracts or expands, these assets fall or rise with them.

At Sunrise Advisors, however, they minimize the inherent risks in a changing market by also investing in what they call satellite assets. Satellite assets supplement the core assets in two ways:

- By avoiding investments in overvalued sectors and applying Modern Portfolio theory, hedge fund management techniques, behavioral economics, and more. This minimizes your overall risk.
- Pursuing investments in select sectors that are priced reasonably in light of the current economic atmosphere. This adds value to your portfolio.



Range of Financial Planning Services:

Sunrise offers a comprehensive suite of financial planning services. The range of assistance offered makes Sunrise a “one-stop shop” of financial advisory.

Some of the specific services that Sunrise offers under this umbrella, among others, include:

- Investment management
- Retirement planning
- Pension maximization
- Social Security optimization
- Estate planning
- Tax planning
- Education planning
- Health care & Medicare

- Insurance

Varied Clientele:

Sunrise Advisors mainly focus on assisting high-net worth individuals and their families. Nevertheless, they can also work with families, individuals, and business owners classified as “emerging affluent.”

Their flexibility in working with individuals and families who do not yet fit into the typical “high net-worth” classification is commendable. It speaks to the firm’s willingness to help those clients who have not yet maximized their investments.

In addition, Sunrise can help with company retirement plans as well as business succession and generational wealth transfer.

Windward Private Wealth Management, Inc. Review

[Windward Private Wealth Management, Inc.](#) is a Registered Investment Advisor in Kansas City and the surrounding area. They operate under fiduciary standards with a fee-only structure. Their offices are located in Overland Park, Kansas, and North Kansas City, Missouri.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Listed below are some of the features of Windward Private Wealth Management, Inc. that merited the firm’s inclusion on our list of 2016’s top financial advisory firms in Kansas City.

A Team of Advisors:

Not all financial advisors can advise you on every aspect of your investments or financial planning. But at Windward, your account is given attention by a team of professionals with a diverse background in financial planning and wealth management.



Your account is reviewed by several divisions within Windward. These include wealth managers, tax specialists, investment specialists, legal and insurance specialists, and client service associates.

This team approach maximizes the input you receive on your investments. It multiplies the perspectives that can better inform your decisions and help you reach your goals faster.

Fee-Only, Fiduciary System:

Windward is not fee-based, allowing for the possibility of additional fees based on extra services or products provided. Instead, they are fee-only, meaning they will charge you a fee for drawing up and implementing your financial plan.

Nothing else is charged. No incentives, no commission, and no extra fees based on the recommendations you receive from your financial advisor or other members of the Windward team.

This happens because of Windward's role as a fiduciary, which dictates that they provide you with unbiased advice. Their suggestions cannot be influenced by extra charges or fees that would influence their revenue. Instead, they must focus only on what's best for you.

Custom Investment Strategies:

Your Windward advisor, along with the Windward team, will review your current portfolio. They will evaluate it for improvements and make recommendations accordingly. Factoring in additional considerations like your risk tolerance and future goals, they will draft a customized investment strategy for you.

From there, Windward will stay on top of your portfolio with continuous monitoring. Additionally, they will update you regularly with news about your account. Windward will also make suggestions on opportunities you might want to take advantage of as well as assets you may need to reconsider.

The Windward Process:

Windward's process of crafting a financial plan for each client is the same. This ensures consistency in the firm's approach in working toward a detailed, comprehensive analysis. It also goes a long way to achieving client satisfaction.

But the uniformity of their approach doesn't mean that Windward applies the same plan to each client. To the contrary, each plan is customized around your financial posture, financial needs, and future goals.

To guarantee that each facet of your financial life is taken into consideration, Windward takes you through a 5-step process. Each step entails a meeting with your Windward financial advisor wherein specific points are discussed.

How It Works



The 5-step process includes:

- **Mutual Discovery Meeting.** During this meeting, your financial advisor gets to know you, your values, goals, assets, needs, and so on. This time is for you to get to know Windward, too. You ask questions of the firm that are most important to you, and together you decide whether Windward is a good fit.
- **Investment Planning Meeting.** This meeting takes place two weeks later. Windward takes you step-by-step through their investment management strategy, assesses your financials for risk tolerance, and reveals their recommended investment plan personalized to

your needs.

- **Mutual Commitment Meeting.** One week later, you sign your contract with Windward along with the necessary paperwork to open your account and transfer your investments.
- **45-Day Follow-up Meeting.** As the name implies, you'll meet with Windward again 45 days after your Mutual Commitment meeting. Here your advisor will produce your finalized investment plan. You'll also review the transfer of your assets, plan implementation, and brokerage statements.
- **Regular Progress Meeting.** This meeting occurs 90 days after your 45-day follow-up. In addition to reviewing the progress of your portfolio, your financial advisor will consult with you about additional financial planning and wealth management services. Some of these include wealth transfer, philanthropic giving, and wealth protection, among others.

From there, you will meet with your financial advisor at least once a year. However, your advisor can meet in-person with you whenever you need. Otherwise, they remain available by phone or email at all times.

Conclusion – Top 9 Financial Advisory Firms in Kansas City

Investors in Kansas City and the surrounding area have it pretty good. There's no shortage of qualified, experienced, fee-only, fiduciary financial advisors and Registered Investment Advisors in Kansas City and beyond.

As the list above demonstrates, when you entrust your money to one of these companies, you're putting your future and the future of your family and loved ones in good hands.

But don't take our word for it. Most of the financial advisors and wealth management firms in Kansas City on our list are more than happy to set up a free, initial consultation with you. They are eager and open to hear your story, to tell you theirs, and to earn your trust and your business.

Feel free to contact any one of these financial advisors in Kansas City today to get started on the path toward a secure future.

If you have questions, comments, or tips about this "Top 9 Financial Advisors in Kansas City, Leawood, and North Kansas City" 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