

Top 9 Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee

2016 RANKING OF TOP WEALTH ADVISORS

Finding the Top Financial Advisor in Nashville and Memphis, Tennessee

Whether you live in the grandiose Tennessee capital of Nashville or call the equally famous corner of the state (Memphis) your home, you are living in an area of rich culture, history, music, and food. You've truly found a worthwhile state to call home. As such, on your journey to finding the best financial advisor or wealth management firm in Nashville and Memphis, Tennessee, you are taking the right steps to setting yourself up for success by reading this report.

As a successful professional seeking out the services of a financial advisor or wealth management firm in Nashville or Memphis, you know that the sheer size of where you live makes finding the right financial advisor in Tennessee even harder. There are thousands of choices, and, while many strive to meet your needs through honesty, experience, and hard work, there are even more advisors who, whether intentionally or not, tend to just stuff your hard-earned money into whichever financial planning model seems to be popular at the time.

That's not how you want to do business! At AdvisoryHQ, we have tirelessly poured through every bit of information about each financial advisor and wealth manager in Nashville and Memphis. We've analyzed all critical information and applied our very own top-down selection methodology which helps the best of these firms' shine, and we've compiled them all here into our list of the top 9 financial advisors and wealth managers in Nashville and Memphis, Tennessee.



AdvisoryHQ's List of the Best Financial Advisors and Wealth Managers in and Around Nashville and Memphis, Tennessee

- [CapWealth Advisors, LLC](#)
- [Family Wealth Management, LLC](#)
- [Legacy Wealth Management](#)
- [Prium Investment Management, Inc.](#)
- [Reliant Investment Management, LLC](#)
- [Silverleaf Capital Partners, LLC](#) • [Summit Asset Management](#) • [Waddell & Associates, Inc.](#)
- [Woodmont Investment Counsel, LLC](#)

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 & Wealth Managers in Nashville & Memphis, TN

Firm	Location
CapWealth Advisors, LLC	Franklin
Family Wealth Management, LLC	Nashville
Legacy Wealth Management	Memphis
Prium Wealth Management, Inc.	Franklin
Reliant Investment Management, LLC	Memphis
Silverleafe Capital Partners, LLC	Memphis
Summit Asset Management	Memphis
Waddell & Associates	Memphis & Nashville
Woodmont Investment Counsel, LLC	Nashville

Methodology for Selecting Financial Advisors and Wealth Management Firms in Nashville and Memphis, Tennessee

What methodology did we use in selecting this list of best financial advisors in Nashville and Memphis, Tennessee?

Using publicly available sources, AdvisoryHQ identified a wide range of financial advisors and wealth management firms that provide services in Nashville and Memphis, Tennessee and the surrounding areas.

We then applied AdvisoryHQ's "Breakthrough Selection Methodology" to identify the final list of top advisory firms that provide services to communities in and around Nashville and Memphis, Tennessee.

Click here for a detailed review of our methodology: [AdvisoryHQ's Ranking Methodology for U.S. & U.K. Financial Advisors.](#)

Detailed Review – Top Ranking Financial Advisors in Nashville and Memphis, Tennessee

Below, please find a detailed review of each firm on our list of the top financial advisors and wealth managers in Nashville and Memphis, Tennessee. We have highlighted some of the factors that allowed these financial advisors and wealth management firms to score so high in our selection ranking.

CapWealth Advisors, LLC Review

[CapWealth Advisors, LLC](#) is a wealth advisory and financial planning firm located just 15 minutes south of Nashville in Franklin, Tennessee. It offers a variety of services to individuals, families, institutions, and foundations, including portfolio management, retirement planning, and tax consultation.

With clients in 32 states and 4 countries worldwide, CapWealth works with over [\\$1 billion](#) in assets under management and still growing!

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

The following is a listing of key factors that allowed CapWealth Advisors, LLC to rank as one of 2016's top 9 wealth management firms in Nashville and Memphis, Tennessee.

Sophisticated Simplicity Approach:

CapWealth's Investment Committee oversees all asset management research. Through its expert analysis, it has created its own Sophisticated Simplicity model which incorporates macro-economic data and analysis into a wide range of exotic, alternative, and private investment landscapes. Independent discovery allows CapWealth to be a catalyst for:

- Change in competitive position
- Corporate restructuring
- Potential for earnings
- Hidden or unrealized value
- A theme-driven nature
- Exceptional management
- New product development and technology advancement

Lifestyle & Wealth Management:

Proactive investment management isn't just about stocks. As clients face inevitable changes through each stage of life, their needs change as well. CapWealth understands this and will be there to help through life's transitions. The following situations may require extra support:

- Divorce
- Marriage
- Estate planning
- Retirement planning
- Death in the family
- College planning
- Job change
- Disability and health planning
- Birth of a child or adoption
- Major inheritance

Wealth of Independence:

CapWealth is an SEC-registered advisor. This means that it is bound by both SEC regulations and its own morals to provide clients with honest,

unbiased advice that is not reliant upon the commissioned sale of a service or product.

Breakdown of Services:

Here, we will take a brief look at the variety of services offered through CapWealth. Each group of services is backed by the knowledge and expertise of the firm and its team:

- **Tax Planning:** Tax planning services include an annual review of your taxes as well as the generation of tax-efficient portfolios. CapWealth also offers notifications in regard to changes in laws which may affect your tax situation and complete record keeping and archiving.
 - **Family Wealth Planning:** A comprehensive family wealth plan begins with a review of your family's assets and estate. Through consultations with CPAs and attorneys, you'll benefit from expert guidance with asset allocation, future estate planning entities, appropriate steps in the event of a death, educational planning, and more.
 - **Investment Services:** As you enter CapWealth's vast world of investments, you'll have the opportunity to work with your advisor in order to establish investment objectives, rebalance your portfolio, coordinate with other professionals, plan for insurance, and more.
 - **Retirement Income & Distribution Planning:** It's never too early to plan for your retirement. A retirement plan through CapWealth covers all aspects of retirement, including an analysis of your current and future situation, ongoing reviews of IRA beneficiaries, tax planning and asset management, and more.
 - **Client Services & Communication:** Good communication is essential to financial success. Not only will you have access to cutting-edge information on the market, economics, and laws, you will also have the option to be included in seminars on tax planning, estate planning, and other financial topics.
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Family Wealth Management, LLC Review

Family Wealth Management first began operating with one goal in mind – to serve the complex financial needs of Ambassador Joe M. Rogers and his family. In 1998, the firm formally became Family Wealth Management and began extending the same great legacy of service to individual clients, families, and non-profit organizations.

Today, Family Wealth Management is a boutique-sized, independent, and fee-only firm located right in Nashville, Tennessee, offering a full suite of financial services, including portfolio management, financial planning, and retirement planning.

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

What follows is a listing of the key factors that allowed Family Wealth Management, LLC. to rank as one of 2016's top 9 wealth management firms across Nashville and Memphis, Tennessee.

Solid Philosophy:

In all it does, Family Wealth centers itself around a set of simple yet important driving philosophies which it incorporates at the forefront of all its business practices. These philosophies are:

- **Independent:** You never need to worry that your success is being compromised due to a conflict of interest.
- **Integrated:** Total wealth management through a comprehensive, expertly curated approach.
- **Teamwork:** A richly diverse team with longstanding ties to the firm and its community.

Custom Tailored Experience:

Each service offered by Family Wealth Management is a starting tool to a completely customized experience.

The needs of each and every client coming through the door vary and, as such, the firm recognizes the need for a unique approach.

It utilizes multi-disciplinary tools and a comprehensive review process to customize some of the following services:

- Portfolio management
- Income tax planning and compliance
- Wealth succession planning
- Family philanthropy
- Risk management
- Accounting and record keeping
- Ancillary management services

An Expert Edge:

Whether the focus is on Managing Director [Steve Thorne](#) or Certified Financial Planner [Kimbrelly Eades](#), it is evident that the firm stands strong with a mix of professional experience and personal history that creates a richly diverse setting for important work to be done.

Each member of the Family Wealth Management team contributes to the overall success of not only the firm but its clients as well.

Legacy Wealth Management Review

With over [25 years](#) in the business, [Legacy Wealth Management](#) combines unparalleled financial planning services with expertly lead portfolio management to offer a completely seamless

experience to each client. Located in Nashville, Tennessee, it serves clients in states all over the northern United States.

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

What follows is an overview of key factors that allowed Legacy Wealth Management to rank as one of 2016's top 9 wealth management firms in Nashville and Memphis, Tennessee.

Independence on Display:

Legacy Wealth proudly serves as an employee-owned, SEC-registered, independent wealth management firm. It offers commission-free services on a fee-only basis, meaning you know your costs up front, and there is never a hidden fee or agenda.

Specialized Services:

Legacy Wealth caters custom services to a variety of clients. These services reach across the country through many states and offer to add value to the following types of specialized clients:

- Physicians
- Attorneys
- Widowers/heirs
- Retirees
- FedEx pilots
- Entrepreneurs
- Executives
- Other professionals

Financial Plan:

Legacy Wealth works through a multitude of facets to create a comprehensive financial plan for each client. Expert knowledge, combined with practical and effective solutions, allow the firm to extend the following services:

- Tax planning
- Estate planning
- Retirement planning
- Insurance planning
- Other planning

Portfolio Management:

An appropriately managed investment portfolio contains inner workings which are closely tied to your financial plan. By identifying your investment objectives and creating a clear plan to develop those objectives into tangible success, Legacy Wealth is able to offer:

- Institutional quality investments
- Rigorous investment selection
- Asset allocation strategies
- Tax-efficient portfolio construction
- Monitoring and reporting

Employer Retirement Plan:

Legacy Wealth has long been a "go-to" firm when it comes to best practices in a variety of employer retirement plan situations. A successful plan requires consistency, effective risk management, and expert advice. Legacy Wealth approaches this success with the following system:



Prium Investment Management, Inc. Review

[Prium Investment Management, Inc.](#) is an investment management firm located in Franklin, Tennessee. Its goal is "making the world safe for ordinary investors." This is important because, oftentimes, minimum asset requirements tend to hover in the half-million-dollar range, and where does that leave everyone else?

Prium believes that everyone should have access to top-notch investment services and, for this reason, Prium accepts clients with almost any minimum they want to invest, as long as the starting point is at a couple thousand dollars.

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

What follows is a listing of the key factors that allowed Prium Investment Management, Inc. to rank as one of 2016's top 9 wealth management firms in and around Nashville and Memphis, Tennessee.

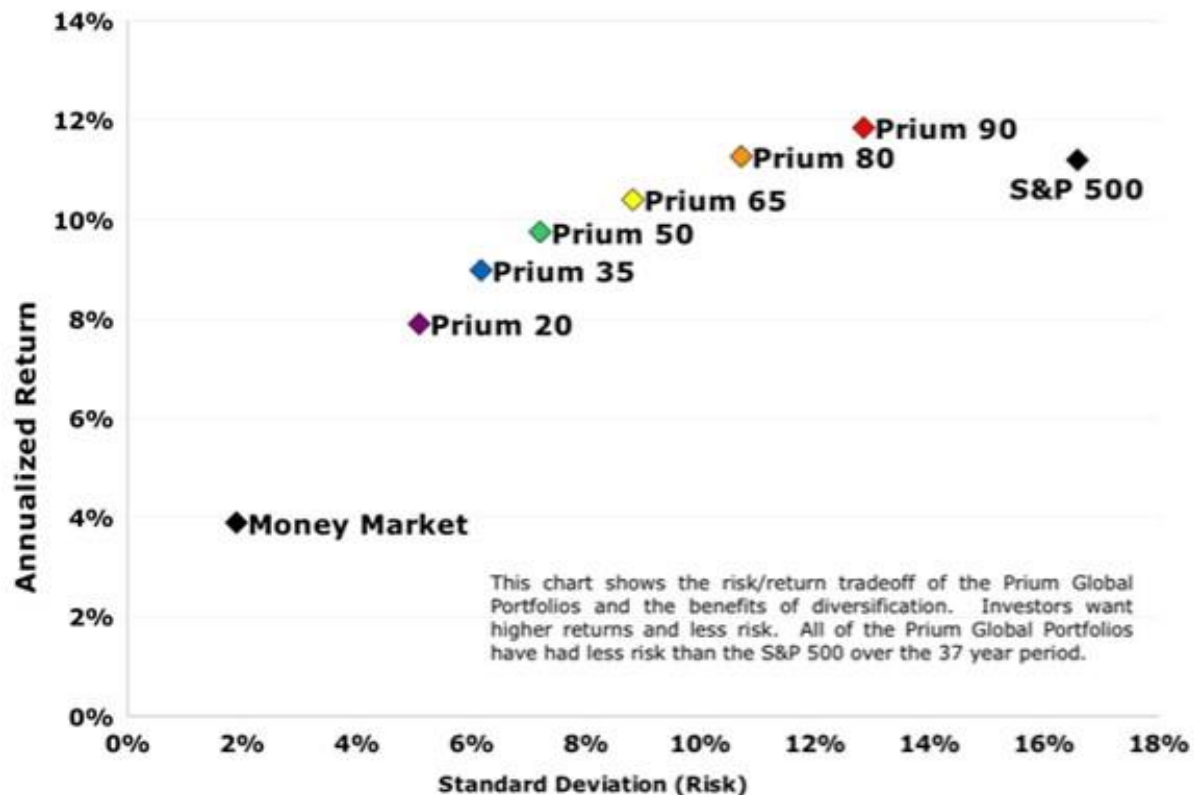
A Dedicated RIA:

Prium Investment is an advisor, not a broker, and it wants to make sure you note this difference. As an RIA (Registered Investment Advisor), it wants to be your primary fiduciary, working to serve your best interest above all else. Prium also offers clients a transparent, fee-only schedule.

Six Global Portfolios:

Doing business on a global scale is a smart way to broaden your access beyond traditional markets. Prium offers a high level of global experience and, in order to reach the needs of all of its clients, it has created six different global portfolios, each one tailored around the level of risk tolerated by the client. Portfolios are globally diversified and include a variety of asset classes in order to mitigate the negative effects of too much risk exposure.

Prium Global Portfolios 1970-2007



Prium Investment Philosophy:

Through the application of global, diversified asset class investing, Prium offers increased success between risk and return. Its tailored investment philosophy aids it in this process and is as follows:

- Managers do not beat the market: Over time, the market always wins. Therefore, Prium doesn't waste time trying to "beat the market" as many managers do.
- Invest to capture market returns: Prium believes in holding investments that track the index in order to capture returns.
- Globally diversify: Predicting markets is extremely difficult. For this reason, Prium believes in globally diversified portfolios which include EFTs.
- Reduce cost and risk: Through a broad mix of asset classes, longterm results are amplified, minimizing cost and risk association.
- Build portfolios for the long term: Each asset class comes with its own built-in risk and return characteristics. These classes are carefully combined to achieve long-term results and higher-than-expected returns.

A Breakdown of Services:

Comprehensive portfolio management services follow a series of steps which range from planning to continuous monitoring. Here, we've outlined the process to give you an idea of how Prium approaches each client's needs:

- Investment planning
- Portfolio planning
- Portfolio implementation
- Portfolio monitoring
- Portfolio rebalancing

Reliant Investment Management, LLC Review

With offices in Memphis, Tennessee and Shreveport, Louisiana, [Reliant Investment Management, LLC](#) offers portfolio management and advisory services to both individual and institutional clients. It currently holds over [\\$700 million](#) in assets under management through about [100](#) client relationships.

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

Below, please find a list of key factors that allowed Reliant Investment Management, LLC to rank as one of 2016's top 9 wealth management firms in Nashville and Memphis, Tennessee.

Experienced Team:

The team at Reliant Investments boasts [over 125 years of conservative](#) yet expert portfolio management. Principals of the firm hold several

community affiliations as well, whether it pertains to public speaking or holding seats on a variety of committees. It's easy to see the level of expertise that awaits you.

Independently Owned:

Reliant Investments is not only owned and managed by its founding principals, but it remains unaffiliated with any other brokerage firms or financial institutions. Furthermore, Reliant Investments is an SECregulated RIA (Registered Investment Advisor). It prides itself on providing commission-free services on a fee-only basis.

Discretionary Portfolio Management:

Reliant Investments chooses to focus its efforts on core asset classes which utilize individual securities and tried-and-true investment strategies to yield high-performing returns. Let's take a look at some of Reliant Investment's fixed income and equity strategies:

- High-quality, tax-exempt fixed income
- Large and mid-cap core equity
- Cash and liquidity management
- Custom equity strategies
- High-quality taxable fixed income
- Balanced allocations

Services for Client Sectors:

Reliant Investments offers services to a variety of client sectors. Each one comes with a set of custom-tailored management and investment strategies which have proven to be the best for that particular situation. Let's take a look at just some of these services:

- Discretionary Portfolio Management
- Administrative Services
- Portfolio Consulting Services
- Retirement Plan Advisory Services
- Transitional Portfolio Management

Each identified client sector is specially targeted to meet the needs of a specific set of clients and, while this list is not all-inclusive, is as follows:

Public Clients:

- Development authorities
- Local municipal governments
- Special districts
- Housing authorities
- Development authorities
- School districts
- County/parish governments
- Transit authorities

Institutional Clients:

- Educational institutions
- Health care entities
- Corporations
- Trusts, foundations, and endowments
- Banks and depositories
- Non-profit and religious entities

Private Clients:

- Investment consultants
- Individual and family clients
- Trusts/estates/foundations
- Retirement assets and retirement plans
- Other financial advisors
- Donor-advised funds

Silverleaf Capital Partners, LLC Review

Silverleaf Capital Partners, LLC is a Memphis-based boutique investment management and financial planning firm operating on a fee-only basis. It is an RIA (Registered Investment Advisor) and stands firmly behind its fiduciary duty to clients.

With a low client-to-advisor ratio, it is able to offer dedicated personal services, with over 60 years of expert industry experience.

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

The following is a list of the key factors that allowed Silverleaf Capital Partners, LLC to rank as one of 2016's top 9 wealth management firms in Nashville and Memphis, Tennessee.

Superior Investment Management:

The balance between market volatility and risk is a delicate one. The team at Silverleaf Capital knows this very well. As economic downturns, recessionary trends, and other negative market conditions begin to threaten the prosperity of its clients, Silverleaf watches carefully, ready to liquidate assets and make important investment decisions in order to safeguard its client's assets. Silverleaf believes this sets it apart from most other firms.

Family Office Approach:

Silverleaf Capital has created a partnership with Fidelity Family Office Services. This partnership allows the firm to offer comprehensive financial planning services and access to the firm's infrastructure, giving clients total control and visibility of their wealth.

Additionally, Silverleaf is experienced in the integration and coordination of a family's variedly deployed assets and will work with your financial custodians (CPAs, attorneys, and brokers) to consolidate your holdings and information for optimal performance.

A Strategic Lifestyle Plan:

Silverleaf Capital offers a unique lifestyle planning service which is designed to preserve your wealth over the long term and pays special attention to the complexity of your assets both now and in the future.

Just as the name implies, strategic lifestyle planning is meant to last throughout your lifetime and accounts for unavoidable environmental effects. These may include economical changes, taxation, and variable regulations and investment climates.

The Benefit Plan Consultation:

If you are a retirement plan sponsor, Silverleaf Capital offers highly expert solutions. It offers consulting on all levels of creating and carrying out the role of a benefit plan. Its goal is to structure a benefit plan which remains simple, transparent, and full of good value. It does so through continuous monitoring and strategic partnerships with plan sponsors.

Summit Asset Management Review

Summit Asset Management is an investment management and financial planning firm who has just celebrate **25 years** of unparalleled service at its Memphis, Tennessee office. It serves individuals, families, trusts, retirement plans, and charitable endowments with a minimum of **\$100,000** of investable assets.

Key Factors That Enabled This Firm to Rank as a Top 2016 Accounting Firm

Below, you will find a listing of each key factor that allowed Summit Asset Management to rank as one of 2016's top 9 wealth management firms in Nashville and Memphis, Tennessee.

Clients at the Forefront:

Summit Asset is a mid-sized, fee-only, independent firm. It is **100% employee-owned** and, as such, it faces no pressures from outside entities to sell products or offer advice solely based on garnering a commission from the sale. The sole driving factor during all stages of planning and implementation is the success of you, the client.

Expert Insight:

Summit Asset offers regular market commentary that is both insightful and innovative. Published regularly on its website, anyone interested in market events can take advantage of the information curated by Summit Asset's team of experts on topics such as "Who's to Blame for the Emerging Market Crisis?" and "9 Questions About Syria."

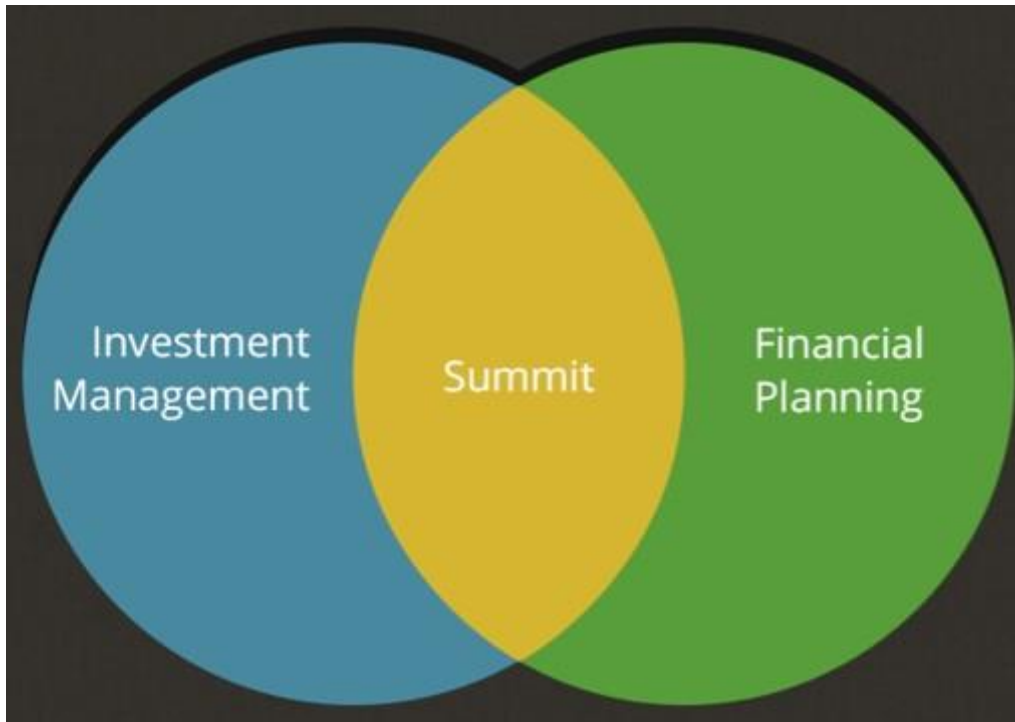
Investment Management at a Glance:

Investment portfolios are created based on a client's current financial situation and his/her future goals. Summit Asset then utilizes a teamdriven approach with an investment committee dedicated to complete oversight and adherence to company disciplines. After a completed portfolio is set into action, the investment committee monitors performance continuously and advises of changes when necessary. Each portfolio takes into account the following:

- Time horizons
- Taxes
- Risk tolerances
- Income
- Life goals

Furthermore, the following is a look at Summit's most often utilized asset classes:

- Individual securities (stocks, bonds, and CDs)
- Mutual funds
- Alternative hedge funds
- Private partnership options
- Exchange-traded funds (ETFs)



Comprehensive Financial Planning:

Creating a client-specific financial plan takes a lot of insight and dedication on the part of your financial advisor. Through a teamcentered approach, Summit Asset works together with the client to create a long-term plan for the family, business or non-profit sector. Typical areas of planning include:

- Education
 - Insurance
 - Retirement
 - Family partnerships
 - Business succession
 - Tax issues
 - Estate and trust
 - Charitable giving
-

Waddell & Associates, Inc. Review

Waddell & Associates, Inc. (W&A) is a firm with offices located in both Memphis and Nashville, Tennessee. Through these offices, it offers complete investment management and financial planning services to both institutional and individual clients. It does require a relationship minimum of at least \$500,000 in investable assets.

As an RIA (Registered Investment Advisor), it is bound by its fiduciary duty to always put the best interests of its clients first. It is an independent firm and remains conflict-free in its everyday business.

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

The following is a listing of key factors that allowed Waddell & Associates, Inc. to rank as one of 2016's top 9 wealth management firms in Nashville and Memphis, Tennessee.

Strength in Values:

W&A adheres to a set of self-regulated core values that propel it to offer only the best of itself to clients. As listed on its website, let's take a look at the firm's outline of core values:

- It cares for its clients and associates like family.
- It requires ethics, intelligence, and competence in its associates.
- It holds itself accountable by practicing the planning and investment advice it recommends to clients.
- It places equal emphasis on financial planning, investment management, and communication.
- It contributes its time, talent, and capital to improve the quality of life in its communities.

The Investment Compass:

W&A believes in compounding a client's returns by following a "compass," which utilizes a variety of investment opportunities. These opportunities include global macro-economic, geo-political, and macromarket sensibilities. This is best done by anticipating market movements before they happen and taking action quickly. Here's a look at a few compass directives that allow it to do so:

- It values simplicity
- It owns what its clients own
- It prioritizes liquidity
- It seeks transparency
- It balances asset management with risk management

Intellectual Capital:

The wealth strategists at W&A work continuously and tirelessly to remain at the top of their industry. The following is just a sampling of acknowledgements and certifications the team has earned:

- CPA (Certified Public Accountant)
- CFP (Certified Financial Planner)
- CFA (Chartered Financial Analyst)
- CDFA (Certified Divorce Financial Analyst)
- PFS (Personal Financial Specialist)
- FINRA Series 7, 8, 24, 27, and 63

Dedicated Client Services:

In order to offer a comprehensive suite of services to both individual and institutional-grade clients, W&A offers flexibility within the following services:

- Estate planning
- Asset management
- Executive benefit planning
- Charitable planning
- Retirement planning
- Concentrated stock positioning
- Education planning

- Tax strategy planning
- Insurance analysis
- Business succession planning
- Employee benefit planning

Additionally, W&A utilizes the following investment vehicles to diversify and safeguard each client's investment portfolio:

- Individual securities
- No-load mutual funds
- Municipal bonds
- Exchange-traded funds (ETFs)
- Money market funds and CDs
- Corporate bonds
- US treasury bonds

Woodmont Investment Counsel, LLC Review

By its own words, [Woodmont Investment Counsel, LLC](#) is a complete investment solution provider located right in Nashville, Tennessee. It serves high-net-worth individuals, families, institutions, endowments, foundations, and trusts.

Founded in 2000, Woodmont Investment is an independent, fee-based RIA (Registered Investment Advisor) and has built upon its success year after year. It also offers highly regarded referrals to outside professionals in order to provide clients with a holistic solution for every need.

**Key Factors That Enabled This Firm to Rank as a Top 2016
Wealth Advisory Firm**

The following is a listing of key factors that allowed Woodmont Investment Counsel, LLC to rank as one of 2016's top 9 wealth management firms in Nashville and Memphis, Tennessee.

An Experienced Investment Team:

Woodmont Investment prides itself on having a diverse team with a multitude of qualifications and real-world experience. The team's backgrounds vary from those in the investment management industry, hedge fund expertise, and self-side investment banking to global fixedincome investment management, Wall Street brokerage firms, and various asset management firms. As you can see, the breadth of experience within the firm is large, and this is a certain benefit to all types of clients.

Tailored Approach to Client Services:

The first step in any plan is getting to know the unique needs of the client and assessing his/her current financial situation. Next, the firm presents the client with a specific investment strategy and asset allocation plan.

Each portfolio usually consists of a unique blend of equities, fixedincome, and, when called for, alternative investments. Each portfolio is monitored every day, and clients always remain well-informed about the activity of their investments. The following is an overview of services clients utilize the most:

- Comprehensive investment management
- Estate planning
- Tax planning
- Retirement planning
- Business ownership

Investment Case Studies:

A tailored approach allows Woodmont Investment to apply its governing principles to a variety of unique client situations. However, one thing they all have in common is the overwhelming desire to succeed. Below is

a snippet of case studies done by Woodmont Investment that showcases the flexibility within its expertise:

INVESTMENT CASE STUDY 1
TRANSITIONING AFTER THE DEATH OF A SPOUSE
A widower in his 70's contacted Woodmont and asked for an evaluation of his investment accounts after reviewing his estate plan with his attorney.

INVESTMENT CASE STUDY 2
NON-PROFIT ENDOWMENT
The investment committee of a not-for-profit organization noticed under performance of its endowment assets and worried that the organization's disbursements could suffer.

INVESTMENT CASE STUDY 3
SALE OF THE FAMILY BUSINESS
A married couple in their 40's sold their company to a larger competitor.

INVESTMENT CASE STUDY 4
INVESTING A DIVORCE SETTLEMENT
A recently divorced woman, "Allison," in her 50's, with two college-aged children, contacted Woodmont after a referral from her attorney.

Conclusion – Top 9 Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee

As you have now finished reading the detailed review sections on each of the firms that made it to our list of the top 9 financial advisors and wealth managers in Nashville and Memphis, Tennessee, you should feel confident that one of these advisors is a great match for you.

As you narrow down your selections, consider making a list of your current assets and an accompanying list of questions you still have about services provided by the financial advisors and wealth managers in and around Nashville and Memphis.

Are you unsure if you want basic financial planning services or if you want to dive into the wide world of investments? Are you wondering if you still have those retirement benefits that you never transferred over from your previous employer? Do you have questions about planning for your children's future educational needs?

All of these are important, and creating a list will allow you to ask a Nashville or Memphis-based financial advisor questions confidently and not forget important factors.

Once you have decided on one or two financial advisors or wealth managers in and around Nashville and Memphis that you feel embody the style and business practices that you value, make contact! Many firms will offer a free evaluation or consultation, but even if they don't specify that they do, most are happy to have a brief conversation about your needs.

Remember, you've worked hard to create a substantial way of life for yourself, so be confident in your choice of whom you choose to manage your wealth and even help you grow it for future generations of your family to come.

If you have questions, comments or tips about this "Top 9 Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee" 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