

Top 9 Financial Advisors in Orlando, Florida

2016 RANKING OF TOP WEALTH ADVISORS

Finding the Top Financial Advisor in Florida

In today's turbulent economy, it's more important than ever to make sound financial decisions that will allow you to live or maintain your desired lifestyle. However, this is not something easily handled on your own.

For this reason, finding a good financial advisor in and around Orlando, Florida can make all the difference between financial success and a financial downfall. Don't become a victim of the stumbling economy. If you are reading this, you most likely concur and need help in choosing the right Orlando-based financial advisor for you, but where do you start?

As you begin reading over our list and reviews of the top financial advisors and wealth managers in Orlando, there are some key areas that you need to pay attention to. This includes what specific services each firm offers and what kind of clients each Orlando financial advisor services.

This should help you see where you may best fit in. Next, make an assessment of where you are now and where you want to be in 5 years, 10 years, and beyond.

Once you have a picture of what you need, it will be easier to match yourself up with a financial advisor in Orlando, Florida that shares your frame of mind.

We are certain you have many questions. You may wonder what it means for an advisor to work on a "fee-only" schedule, or you may want to know if investment planning is included in a basic financial plan.

Whatever the case may be, as you read through our report, we hope the information contained within will give you some peace of mind.



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

- **Allgen Financial Services – Financial Advisors, Inc.**
- **Certified Financial Group, Inc.**
- **FirsTrust Private Wealth Management Group**
- **Moisand Fitzgerald Tamayo, LLC**
- **Resource Consulting Group**
- **RiverTree Advisors, LLC**
- **Sharia Portfolio, Inc.**
- **The Bogdahn Group**

- **WaterOak Advisors**

This 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 Orlando, Florida

Firm	Location
Allgen Financial Services – Financial Advisors, Inc.	Orlando
Certified Financial Group, Inc.	Altamonte Springs
FirsTrust Private Wealth Management Group	Orlando
Moisand Fitzgerald Tamayo LLC	Orlando
Resource Consulting Group	Orlando
RiverTree Advisors, LLC	Winter Park
Sharia Portfolio, Inc.	Lake Mary
The Bogdahn Group	Orlando
WaterOak Advisors	Orlando

Methodology | Financial Advisors – Florida

What methodology did we use in selecting this list of the best financial advisors in Orlando and top wealth managers in Florida?

Using publicly available sources, AdvisoryHQ identified a wide range of financial advisors, asset and wealth managers, and financial planners that provide services in Orlando and surrounding areas.

We then applied AdvisoryHQ's [Breakthrough Selection Methodology](#) to identify the final list of top advisors that provide services to communities throughout Florida.

Detailed Review – Top Ranking Financial Advisors in Florida

What comes next is a detailed review of each of the firms that have been selected to be included in our list of the top 9 financial advisors and wealth managers in Orlando, Florida.

Allgen Financial Services – Financial Advisors, Inc. Review

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

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

Listed below are key factors that allowed Allgen Financial Services – Financial Advisors, Inc. to rank as one of 2016's top 9 financial advisory firms in Orlando, Florida.

The Path:

Allgen Financial wants to help you design a path to success. No matter where you are on that path currently, it has a roadmap to get you to the

next stage. Here's a look at what it has outlined as the 3 fundamental stages of life:

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

Comprehensive Financial Planning:

How would you like to experience complete financial freedom? Perhaps you'd travel more, live more or have the opportunity to pay for your child's education. With a solid financial plan, YOU CAN. Allgen Financial seeks to replace your worry with joy, and here's its approach to doing so:

- Identify your goals: Getting to know you and identifying your goals set a tone for the future and allows for a comprehensive plan.
- Personalize a plan: A personalized plan will be created for you to help you take charge of your money and reach your goals.
- Monitor progress: With the help of its online Wealth Tracker, your accounts are continuously updated, and progress is secure and accessible to you with just a few clicks.

Investment Management:

Wealth does not usually occur overnight. Through thoughtful investing, however, wealth can accumulate and set you up for a secure future. Allgen Financial has a team of highly experienced advisors who know how to invest on your behalf based on your specific needs and your tolerance to risk. To get started, your advisor will cover the following:

- Profile, goals, timeframe, etc.: Just like with a financial plan, the first step is to understand who you are, what you want, and how you want to get there.

- Investments: Allgen Financial evaluates all investment options to find the best fit for you.
- Risk assessment: Prioritizing risk tolerance is essential to a successful portfolio.
- Screening: Allgen Financial routinely looks for investing opportunities that have the highest long-term returns and the lowest amount of risk.
- Your portfolio: After all considerations have been made, you will have a customized portfolio that is designed to outperform your risk profile and yield a high rate of return.

The Call to Independence:

Allgen Financial is an independent firm that offers competitive fee schedules. It is a Registered Investment Advisor (RIA) who will take every opportunity it can to show you that you are its number one priority.

Account Affiliation:

Allgen Financial utilizes the services of Charles Schwab to allow clients around-the-clock access to their investment portfolio information.

Certified Financial Group, Inc. Review

Certified Financial Group, Inc. is an independent firm that is not owned or controlled by any third-party entities and does not deal with "inhouse" proprietary products.

It is located just outside of Orlando, in Altamonte Springs, Florida, and it offers financial planning and investment management services to a variety of families, individuals, athletes, and other affluent clients.

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

Below are key factors that enabled Certified Financial Group, Inc. to be rated as one of 2016's top 9 financial advisory firms in and around Orlando, Florida.

A Certified Team:

Certified Financial's team not only brings with it over 250 years of knowledge in all areas of financial planning, but, in addition, all planners are active members of the Financial Planning Association and ascribe to a stringent code of ethics as Certified Financial Planners (CFPs). That's a lot of team strength in just one place.

Creating a Financial Plan:

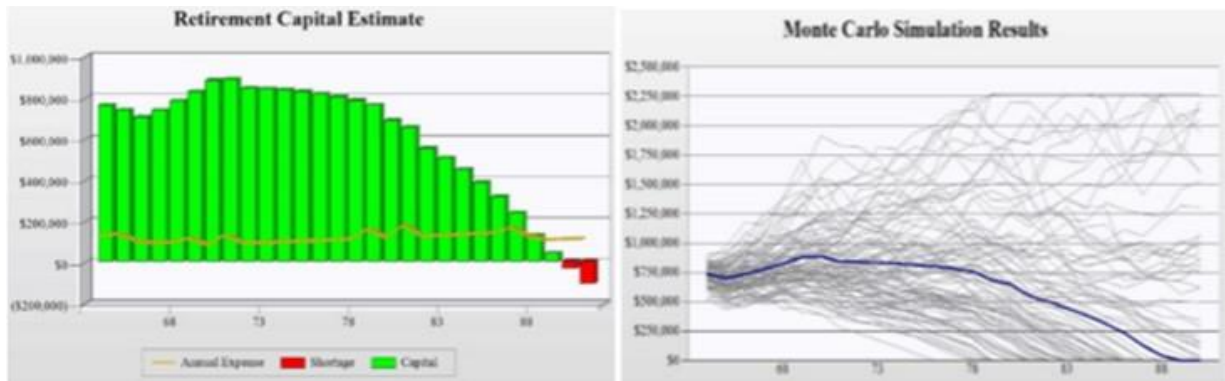
When working with one of Certified Financial's CFPs, you will have a clearer view of your current financial status. They will take well-defined action to help meet all of your financial goals. The following is a listing of financial plan services offerings:

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

An Eye on the Details:

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

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



The Process:

A comprehensive financial plan usually follows a predefined process to get you to where you need to be. Next, we will take a closer look at this process:

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

FirsTrust Private Wealth Management Group Review

FirsTrust Private Wealth Management Group is proud to be one of America's largest ensemble firms of fee-only, NAPFA-registered financial advisors. It has offices located in both Orlando, Florida and Atlanta, Georgia.

Financial planning services offered through FirsTrust include investment management, tax management, trust and estate planning, and more.

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

The following is a listing of key factors that allowed FirsTrust Private Wealth Management Group to rank as one of 2016's top 9 financial advisory firms in Orlando, Florida.

The Issue of Fees:

Perhaps the biggest driving force behind FirsTrust is that it has a rocksolid commitment to serving your best interests regardless of what trends in the industry dictate. It does this by utilizing a fee-only structure that allows it the freedom to shop and compare multiple resources without fear of a commission-based push.



The FirsTrust Way:

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

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

Appropriately Managed Investments:

Knowing that your financial advisor is working only for you should put your mind at ease, but what's next? When devising an investment portfolio, FirsTrust knows that no two clients are alike; therefore, no two portfolios can be built the same. With an initial focus on minimizing taxes, FirsTrust utilizes the widest selection of high-performing investments from across the globe.

Tax Planning and Consulting:

The team at FirsTrust is highly experienced in dozens of tax management strategies, and each is designed to put money back into your pocket. In its own words, "it's amazing how many times the same dollar can be taxed." Knowing how to legally lower your tax burden can make a big difference in both the short and long term.

Trust and Estate Planning:

There are many factors that contribute to trust and estate planning. In order to garner a better understanding of the facets of this kind of plan, let's break them down appropriately:

- Recent death: During a difficult time, knowing what to do and what not to do are crucial. FirsTrust will sensitively streamline the administration of an estate.
- Trust planning: Considering that different states have different laws pertaining to trusts, FirsTrust's independent fiduciary advisors will

assist you in selecting the best state (or country) in which to curate your plan.

- Serving as a trustee: Outsourcing the administrative duties of a trust can be wise. FirsTrust serves as your trustee and will handle all legal requirements.
- Reducing taxes: Prudent planning allows for a reduction in taxes, ones that can needlessly take a big chunk out of your estate. FirsTrust has saved its clients millions of dollars in unnecessary taxes.
- Saving Money: A court-supervised probate becomes unnecessary with basic estate planning, which allows you to save greatly on fees and court costs.
- Protecting Assets: There's no need to get an offshore trust to protect your family's assets. FirsTrust protects your money from being chipped away by creditors, lawyers, and divorcing spouses alike.

Moisand Fitzgerald Tamayo, LLC Review

With an exceptionally accredited team of nearly 20 members and offices in both Orlando and Melbourne, Florida, [Moisand Fitzgerald Tamayo, LLC](#) wants to be your sanctuary from the noise.

It offers financial planning and wealth management services to a variety of clients, from retirees and pre-retirees to trusts and those who have found themselves with sudden wealth.

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

Below are key factors that enabled Moisand Fitzgerald Tamayo, LLC to rank as one of 2016's top 9 financial advisory firms in and around Orlando, Florida.

The Moisand Fitzgerald Tamayo Difference:

The team at Moisand Fitzgerald Tamayo knows that no one can predict the future, but being prepared with a sound financial plan can alleviate much of the burden that comes with the unknown. In a world where poor financial practices run rampant, it has created a sanctuary for you filled with truly objective advice. The following is a sampling of what it believes sets it apart from the rest of the noise:

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

Financial Planning:

A sound financial plan includes recommendations in areas of interest to you. Success doesn't just come from chance or luck but rather from a well-developed and appropriately implemented plan. Here's a look at services offered:

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

Your Retirement Plan:

Whether you are already in retirement or simply want to create a solid plan, Moisand Fitzgerald Tamayo has decades of expert inside knowledge to lend. Currently, interest rates are low, tax rates have the potential to rise, and the stock market is volatile. There is a difference between drawing cash from a portfolio and saving into a portfolio. A good plan encompasses both.

Investment Goals:

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

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

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

Resource Consulting Group Review

Since 1988, [Resource Consulting Group](#) has brought together the key disciplines of risk management, philanthropic planning, taxes, estate planning, and investments to offer a fully integrated wealth management system to a variety of high-net-worth individuals and families.

It currently manages \$1.4 billion in assets and proudly operates as an independent, fee-only firm. It has no products to sell and no commissions to seek out.

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

Wealth Advisory Company

Below you will find some of the key factors that enabled Resource Consulting Group to rank as one of 2016's top 9 financial advisory firms in Orlando, Florida.

Core Values:

Resource Consulting stands behind a set of core values which it believes is essential in creating a lasting, positive client relationship. The core values outlined by the team are:

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

The Seven Investment Fundamentals:

In order to encompass a range of services, Resource Consulting has taken the most relevant investment objectives and created The Seven Investment Fundamentals to help clients avoid the dangers of the market. Let's take a look:

- Have an appropriate allocation to equities: Properly allocated assets are the single strongest determinant of yielding high returns over the long term. In simple terms, don't put all your eggs in one basket.
- Stay fully invested: Timing your investments properly is key. Market timing can add uncertainty and reduce efficiency, both of which should be avoided.

- Keep costs down: Resource Consulting believes that the annual portfolio cost should be no more than 1%.
- Use only short-term bonds: These bonds offer less risk. Exposure to risk from long-term bonds only offers a small return.
- Include small cap stocks: Over time, small cap stocks garner higher returns than large cap stocks.
- Include value stocks: Value stocks also produce higher returns and allow for significant growth.
- Have broad diversification: No single investment strategy works all of the time. Reduce risk through the use of asset diversification.

The Systematic Financial Solution:

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



Retirement Planning Services:

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

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

- Broad resources: The Resource Consulting team is accredited and includes CPAs, MBAs, CFPs, and two attorneys to be on your side.
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RiverTree Advisors, LLC Review

RiverTree Advisors, LLC believes that the right mix of technology, communication, service, and flexibility will lead to a successful clientadvisor relationship.

Through its offices in both Winter Park, Florida and Boulder, Colorado, it serves a wide variety of clients worldwide and offers comprehensive investment advisory services.

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

Below are key factors that enabled RiverTree Advisors, LLC to rank as a top 2016 wealth management firm in and around Orlando, Florida.

The Independent Choice:

As an independent, fee-only financial advising firm who is a Registered Investment Advisor (RIA) with the SEC, it believes in the essence of being a true fiduciary for its clients.

RiverTree Investment Philosophy:

Utilizing both internal and external expertise, RiverTree Advisors applies logical and organized solutions to each investment portfolio.

It maintains essential flexibility throughout its approach to adjust to global market changes. Also, RiverTree Advisors values global allocation of assets, liquidity in its holdings, and, as always, complete transparency to its clients. Each investing relationship begins with the client completing a scientifically-based "volatility assessment" to determine

the appropriate course of action. Managing risk is always at the forefront.

The Art of Active Management:

RiverTree Advisors believe that utilizing an automated system and waiting 20 to 30 years to find out if an investment philosophy is successful is just too long. An actively-managed portfolio – one which relies on the human mind to add value and logic to the process— is the most successful way to handle investments.

A Successful Team:

Beginning with Principal Ted Rich, all the way down to First Administrative Lisa Strange, the team at RiverTree Advisors is rooted in decades of expertise. In addition, RiverTree Advisors utilizes an extensive team of talented professionals who are not employees of the firm. On any given day, you'll find up to 30 of these individuals handling investments for their clients.

Free Risk Analysis:

To garner a bit of insight on your personal financial risk situation without making a commitment, take advantage of the Risk Analysis tool offered through RiverTree Advisors. It's located on its home page and can provide a bit of useful insight.

Sharia Portfolio, Inc. Review

Located just outside of Orlando, in Lake Mary, Florida, [Sharia Portfolio, Inc.](#) is a boutique asset management firm specializing in Shariacompliant investing and rooted in Islamic principles.

As an SEC Registered Investment Advisor (RIA), it operates as an independent, fee-only fiduciary. This means that no commissions are attached to your investments and no conflicts of interest, ever.

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

Below are key factors that enabled Sharia Portfolio, Inc. to be rated as one of 2016's top 9 financial advisory firms in and around Orlando, Florida.

Sharia-Compliant Investing:

Being Sharia-compliant and adhering to the Halal way of investing means that decisions are driven by ethics and social responsibility. Sharia Portfolio completely avoids industries related to alcohol, tobacco, pornography or gambling.

Furthermore, in accordance to Islamic principles, the firm avoids pork and interest-based finances as well as those businesses whose operations are highly leveraged.

The Mission:

Achieving your financial objectives is the primary goal of each investment portfolio. Clients can enjoy the following benefits:

- Annual reports
- No long-term commitments
- Online account access
- Monthly summarized statements
- Personalized portfolios
- Peace of mind

Investment Strategies:

With years of experience at the helm, Sharia Portfolio acts diligently to deliver time-tested strategies that will allow you to reach your financial goals. Long-term investment perspectives come from years of managing assets through a constant up-and-down market cycle.

Account Types:

Through TD Ameritrade, Sharia Portfolio offers a variety of investment accounts. Here's a look at just some of the accounts available to clients:

- Traditional IRA
- Roth IRA
- Rollover IRA
- SEP IRA
- SIMPLE IRA
- Individual
- Joint tenants
- Custodial (UTMA or UGMA)
- Limited liability company
- Corporate
- Pension or profit plan
- Trust

Investment Strategies:

While each portfolio is ultimately customized to fit the individual needs of the client, the basis starts with three separate levels of investing. They are:

- Aggressive: With a focus on common stocks, mutual funds are also utilized for greater diversification. Your assets are heavily allocated through equity.
- Moderate: With a slightly lesser dependence on equities, this approach focuses on dividend-paying stocks and mutual funds.
- Income: The goal for this strategy is income and preservation of capital. The focus remains on dividend-paying stocks and mutual funds but is tailored for short-term investing.

Face-to-Face Consultation:

The first step to becoming a client of Sharia Portfolio (or finding out if you want to be one) is to contact it for a completely free, no obligation consultation. It can offer you a personal assessment and explain its

investment philosophy in a way which applies to your individualized financial situation.

The Bogdahn Group Review

The Bogdahn Group works through a system of core services that offers to build a strong foundation for each client. It has a full range of investment consulting services which apply to all types of institutional plans.

Headquartered in Orlando, Florida, The Bogdahn Group also has offices in Illinois, Pennsylvania, Ohio, Wisconsin, Michigan, and Oklahoma. Its cumulative assets under management total over \$55 billion.

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

Below are key factors that enabled The Bogdahn Group to be rated one of this year's top 9 financial advisory firms in Orlando.

An Independent Philosophy:

As an independent, employee-owned firm, The Bogdahn Group adheres to a "hard-dollar" fee arrangement, and 100% of its revenue comes from money earned from its clients – never commissions or affiliated payments.

Additionally, The Bogdahn Group is a Registered Investment Advisor (RIA).

A Great Team:

The Bogdahn Group's team of advisors comprises 65 experienced professionals, with 31 of them averaging over 20 years of experience each! This includes 15 Chartered Financial Analysts (CFAs) and 25

advanced degree holders –impressive, and a great asset to have on one's side.

Investment Consulting Services:

The Bogdahn Group does one thing and one thing only: investment consulting. It will help you build a strong portfolio and always act in your best interest. What can be a complicated and confusing avenue does not have to be, and your investment advisor will show you how to keep it simple and grow your assets for a significantly improved future.

Defined Benefit Approach:

Plan sponsors can benefit from working with The Bogdahn Group to find solutions to every aspect of defined benefit investing. Acting as your trusted fiduciary, your advisor will walk you through all areas of your plan and provide you and your plan participants with total retirement solutions by way of the following:

- Investment policy development
- Manager/strategy evaluation
- Strategic asset allocation
- Custodian evaluation
- Board/investment committee education
- Monthly and quarterly reports
- Quarterly economic summary
- Investment manager searches
- Attribution and style analysis
- Investment manager due diligence
- Assist with asset/liability studies

Defined Contribution:

Working with plan sponsors and retirement committees, The Bogdahn Group has a two-fold mission: to support your fiduciary obligations and to provide participants with aligned investment opportunities. It does so through the following ways:

- Recordkeeping and administrative services
- Plan level fee analysis

- Manager/strategy evaluation
- Facilitate vendor selection
- Investment policy development and review
- Quarterly summaries
- Fund evaluation and recommendations
- Guidance for defined contribution

Endowment & Foundation Services:

Managing portfolio performance when it comes to endowments and foundations is important. For this reason, The Bogdahn Group will simplify investment and fiduciary decisions for hospital, college, university, and other non-profit clients. Exceptional risk management allows a strategic organization of purposes to achieve spending requirements. Let's take a look at what this entails:

- Strategic asset allocation
- Investment policy development
- Monthly and quarterly reports
- Custodian evaluation
- Investment manager due diligence
- Attribution to style analysis
- Spending policy review and development
- Board/investment committee education

WaterOak Advisors Review

Going into business in 1997, WaterOak Advisors has since served individuals, families, foundations, endowments, and institutions. It offers high quality, institutional caliber investment solutions.

It has over \$1.4 billion in assets under management and operates in two Florida locations: Winter Park and Palm Beach Gardens.

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

Wealth Advisory Company

The following is a list of key factors that enabled WaterOak Advisors to rank as one of 2016's top 9 financial advisory firms in and around Orlando, Florida.

The Fee-Only Process:

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

Wealth Planning Services:

Before the team at WaterOak Advisors takes you down the path of investments, it offers you a chance to develop a comprehensive wealth management plan in order to align all of your finances with the upcoming investment strategies you plan to utilize. While this is not a requirement to get investment services, it's a smart way to keep all of your finances on the same page.

Investment Management for Individuals:

The first step in any good plan is getting to know the specific needs and objectives of the client. Through a consultative approach, each client receives a Wealth Roadmap which is carefully monitored to ensure that the advisor is reaching your financial goals.

Investment Management for Institutions:

As with an individual investment plan, a consultative approach will help WaterOak Advisors best understand the specific needs of the institutional client. An investment policy statement (ISP) is created for each client and will aid in creating appropriate investment opportunities.

Strategic Alliances:

In order to offer you the best investment services possible, WaterOak advisors has partnered up with the following entities:

- Dimensional Fund Advisors Ltd.
- AQR Capital Management
- iShares

Barron's Top 100:

Water Oak Advisors have been ranked as one of *Barron's* Top 100 Independent Advisors for 5 separate years! It made the list in 2008, 2009, 2010, 2014, and, most recently, in 2015. This impressive ranking must stand for something.



Conclusion – Top 9 Financial Advisory Firms in and around Orlando, Florida

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

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

In the case that an advisor does not offer a consultation, you may still be able to get an answer or two, regarding your specific questions, by giving him/her a call. We have found that most firms are happy to answer your questions. If they're not – perhaps that's a good indicator that you may want to take your business elsewhere.

Knowing what you want and aligning it with the services offered by each advisor on our list of the top financial advisors in Orlando will make your decision process much smoother. This is an exciting yet nervewracking time, and we encourage you to exercise your confidence muscle as you get one step closer to financial freedom.

If you have questions, comments, or tips about this "Top 9 Financial Advisors in Orlando, Florida" 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