
Top 10 Financial Advisors & Wealth Management Firms in Dallas, TX | 2018 Ranking

RANKING & REVIEWS BEST FINANCIAL ADVISORS IN DALLAS, TEXAS

Intro: 2018 Ranking of the Top-Rated Financial Advisors in Dallas, Texas

There is a wide range of registered investment advisors (RIAs), wealth managers, and financial planners in Dallas, Texas.

Deciding to hire a financial advisor comes with a lot of questions. Where can you find a great wealth management firm in Dallas? How can you trust a Dallas financial advisor to put your interests first?

These questions are just the tip of the iceberg. There are many factors to consider when searching for a top-rated wealth management firm or financial advisor in Dallas, Texas.

To answer the many questions that Dallas residents may have regarding the best financial advisors in Dallas, we have conducted a detailed analysis of wealth managers, financial and investment advisors in Dallas.

We have published our findings in the sections below, starting with a list of the top advisors, financial planners, and registered investment advisors in Dallas.



Award Emblem: Best 10 Financial Advisors in Dallas, TX

Top 10 Financial Advisors in Dallas, Texas | Brief Comparison & Ranking

Best Financial Advisors in Dallas	Highlighted Features	Rankings
Beaird Harris Wealth Management	Young Professionals program	5
Clintsman Financial Planning	Free one-hour consultation	5
Heritage Financial Planning	Financial & lifestyle resources page	5

HFS Wealth Management	Total digital access	5
Lee Financial	Whole Vision approach	5
Paradigm Advisors, LLC	Extensive certifications & affiliations	5
Tolleson Wealth Management	Private banking services	5
True North Advisors	The Three-Sixty Process	5
Chessman Wealth Strategies	Faith-based financial planning	3
SFMG Wealth Advisors	Executive wealth management services	3

Table: Top 10 Best Financial Advisors in Dallas, Texas | Above list is sorted by rating

Tips for Selecting the Best Dallas Financial Advisors

When it comes to choosing the best Dallas financial advisor, there are plenty of firms to choose from. With so many options to consider, how can you narrow the search?

First, you should take a close look at what each financial advisor in Dallas has to offer, and match those services up with your own personal financial goals.

Are you planning for retirement? Have you recently changed jobs? Do you have a recent inheritance or an impending divorce that will affect your financial future?

As you will see in the following reviews for financial advisors in Dallas, each Dallas financial advisor specializes in varying areas of financial planning and wealth management.

If your needs are of a broader nature and you wish to have peace of mind through simple yet comprehensive financial planning, you may be well-suited with a Dallas financial advisor that offers a broader range of services.

Once you've narrowed down your choices to a select few of these top-ranking Dallas wealth managers, see if any of your selected advisors offers an introductory consultation session.

Whether it's a free or paid consultation, this can be a good way to "feel out" a prospective financial advisor in Dallas before committing to their services.



Top Wealth Management Firms in Dallas

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services and products that are ranked on its various top rated lists?

Please click here "[AdvisoryHQ's Ranking Methodologies](#)" for a detailed review of AdvisoryHQ's selection methodologies for ranking top rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Top Ranking Best Wealth Management Firms in Dallas

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

Click on any of the names below to go directly to the review section for that firm.

- [Beaird Harris Wealth Management](#)
- [Chessman Wealth Strategies](#)
- [Clintsman Financial Planning](#)
- [Heritage Financial Planning](#)
- [HFS Wealth Management](#)
- [Lee Financial](#)
- [Paradigm Advisors, LLC](#)
- [SFMG Wealth Advisors](#)
- [Tolleson Wealth Management](#)
- [True North Advisors](#)

Click below for previous years' rankings:

- **2016 Review:** [Top 10 Financial Advisors in Dallas](#)
- **2017 Review:** [Top 9 Financial Advisors in Dallas](#)

Beaird Harris Wealth Management Review

[Beaird Harris](#) started out as a CPA firm with a goal to turn tax compliance into a pain-free process for its clients.

Since then, they have grown to include wealth management services while staying true to their core roots as tax specialists, integrating these skills to become a [fee-only](#), fiduciary wealth management firm in Dallas.

Key Factors That Enabled Beaird Harris to Rank as a Top Wealth Management Firm in Dallas

Specialization in Tax Services

You can prepare a great financial plan and realize above-average returns, but without a proper understanding of the tax implications, a hefty portion of your earnings or the money you set aside for your heirs will head to Uncle Sam.

Beird Harris is a wealth management firm in Dallas that understands the importance of taxes, helping clients navigate through a challenging tax landscape filled with changing regulations and complex rules.

Their financial planners in Dallas can help you create a multi-year tax plan that will help you generate wealth through tax services for:

- Federal tax returns
- State tax returns
- Gift tax returns
- Trust tax returns
- Non-profit tax returns
- Tax planning
- IRS representation
- Sales tax returns
- Resolution of IRS notices
- Estate tax returns

Young Professionals Program

In order to generate wealth, you need to have firm financial footing. For young high-income earners, this wealth management firm in Dallas offers a program called [Young Professionals](#).

Designed to help younger clients develop healthy financial habits, Young Professionals helps high-income clients effectively build wealth through paying off student loans, financing a home, and saving for retirement.

The Dallas financial planners at Beird Harris will help young people answer specific questions like:

- How do you effectively and tax efficiently maximize your retirement savings?
- How much can you afford to set aside each month?
- What's the most efficient way to reduce your debt burden?
- Which risk management strategies will best meet your needs?



Dallas Wealth Managers

Rating Summary

Although Beard Harris may have begun as a tax and accounting firm, they have since grown into one of the best Dallas wealth managers in the area.

Uniquely, this Dallas financial advisory firm even offers specialty services, like the Young Professionals Program and [business consulting services](#), further enhancing their overall value.

As a fee-only fiduciary offering financial planning and investment management to individuals, families, businesses, and healthcare professionals, Beard Harris abides by high standards of integrity and excellence, solidifying the firm's 5-star rating.

See Also: [*Best Financial Advisors in San Antonio and New Braunfels, Texas*](#)

Chessman Wealth Strategies Review

[Chessman Wealth Strategies](#) was founded in 2004 as an independent financial advisor in Dallas, Texas, but they offer services to clients throughout the United States. Chessman Wealth provides financial planning and wealth management services geared to a unique set of clients.

This financial planner in Dallas operates on Christian principles and is committed to providing financial advice accordingly, making the firm a great option for clients that prefer a value-based approach.

Key Factors That Enabled Chessman Wealth Strategies to Rank as a Top Wealth Management Firm in Dallas

Fiduciary Commitment

While the firm does not clearly indicate whether they are fee-based, according to their [ADV](#), advisors may receive additional compensation or commissions through insurance or Medi-Share recommendations, meaning that the firm likely follows a fee-based structure.

Although we tend to favor fee-only advisors, we have included Chessman Wealth on our 2018 Ranking of Best Dallas Financial Advisors for their fiduciary commitment.

As an RIA, clients can rest assured that these Dallas financial advisors will always act in their best interest, as they are legally obligated to uphold the fiduciary standard.

Faith-Driven Advisors

If your daily life is anchored by faith and following biblical principles, Chessman Wealth may be perfect for you.

As Christian Financial Advisors in Dallas affiliated with [Kingdom Advisors](#), an organization of Christian financial advisors, they believe in the eternal significance of the decisions you make concerning the stewardship of the resources God has bestowed upon you.

The Certified Kingdom Advisor™ designation allows these Dallas financial advisors to integrate financial expertise and biblically-wise counsel into an advising role. Advisors are required to complete nine months of training and meet high requirements of stewardship.

For those that prefer a Dallas financial advisor that is grounded in faith-based principles, the advisors at Chessman Wealth are a great option.



Chessman Wealth Strategies

Rating Summary

As a top financial advisor in Dallas, Chessman Wealth has plenty of positive attributes. Not only do they offer faith-based financial advisement and personalized service, but they also provide free, no-obligation consultations and a wealth of [trademarked solutions](#).

While Chessman Wealth remains a top-rated financial planner in Dallas, their 3-star rating is based on two key factors: lack of transparency and significantly higher fees.

Although information on their fee structure is detailed on the firm's [ADV](#), Chessman Wealth does not make this information easy to find. Without a direct link to their ADV—or any website mention about their fee structure—potential clients may find it challenging to determine whether Chessman Wealth is the right Dallas financial advisor for them.

It's also worth mentioning that their fees are significantly higher than that of competing rates for wealth management in Dallas. Clients investing less than \$5 million will receive annual fees that are [well above the national average](#), paying anywhere between 1.80-1.30 percent.

With that said, however, paying higher fees for financial services that are aligned with their faith may be more than worthwhile, maintaining Chessman Wealth as a competitive option among Dallas wealth management firms.

[Don't Miss: Top Financial Advisors in Greensboro, Chapel Hill, and Winston-Salem, North Carolina](#)

Clintsman Financial Planning Review

Located in Southlake, [Clintsman Financial Planning](#) is a [fee-only](#) wealth management firm serving clients in the Dallas/Fort Worth area.

They bring experience, objectivity, independence, flexibility, and affordability to the financial advisory industry, providing competitive options for clients that need expert financial advice.

Key Factors That Enabled Clintsman to Rank as a Top Wealth Management Firm in Dallas

Comprehensive Financial Planning Services

This wealth management firm in Dallas offers comprehensive financial planning services. Their team of Dallas financial advisors can help with either quick financial issues or long-term wealth management.

Financial plans and life plans are not set in stone, and Clintsman Financial Planning offers the kind of preparation and flexibility you need to feel comfortable about your future. Their services include:

- Personal Financial Planning
- Retirement planning strategies
- Cash flow spending plan
- College funding advice
- Stock option advice
- Lump sum distribution advice
- Ongoing asset management
- Life and disability insurance needs analysis
- Second opinion on investments or current financial plan
- Financial seminars for military, church, and civic groups
- Corporate employee financial education

Client-Centric Process

Clintsman's website outlines the financial planning process clients can expect, so they have an idea of the kind of experience they'll have while working with this wealth management firm in Dallas.

- Initial Inquiry: Upon first contact, receive information about fees, methodology, and philosophy

- Get Acquainted Meeting: Free, one-hour conversation about goals, services needed, and an estimated quote
- Data Gathering: Collection of the financial information needed to get started - half of the fee is paid at this point
- Analysis & Plan Creation: Research is conducted to come up with specific recommendations and plans
- Presentation: Dallas financial advisors present the proposed plan and course of action to their client
- Implementation & Follow-up: Advice proposed during the presentation is put into action either on your own or in conjunction with your Dallas financial planner



Clintsman Financial Planning, Dallas

Rating Summary

With fee-only advisement, a client-centric approach, and over 60 years of combined experience, Clintsman Financial Planning offers expert financial services, making them one of the best financial advisors in Dallas to consider partnering with this year.

The firm's flexibility with financial planning is particularly unique, allowing clients to choose how involved they want to be in the process.

The Dallas wealth management team at Clintsman can create a plan that you can put into action yourself, leaving the option to engage their services in the future if you choose, ultimately providing a deeply customizable experience and solidifying the firm's 5-star rating.

[Related: Best Financial Advisors in Austin, TX \(RIAs, Wealth Managers, Planners\)](#)

Heritage Financial Planning Review

[Heritage Financial Planning](#) is an experienced Texas financial advisor specializing in retirement planning, investment management, asset allocation, and stock options planning.

With approximately \$158 million in assets under management, HFP maintains three financial planning firms including Dallas, Grapevine, and Southlake/Keller. HFP is a [fee-only](#) wealth management firm in Dallas.

Key Factors That Enabled Heritage Financial Planning to Rank as a Top Wealth Management Firm in Dallas

Transparent & Flexible Fees

As a fee-only financial advisor in Dallas, Heritage Financial Planning provides a transparent fee structure based on assets under management.

According to the firm's [ADV](#), clients can expect to pay anywhere between 1.00 percent and 0.50 percent for asset management, depending upon the total amount.

Interestingly, minimum annual fees will differ depending on the financial advisor that a client works with, ranging between \$3,000 to \$10,000. These varied minimums make it easy for low and high-net-worth clients to access asset management services, demonstrating a unique flexibility from these Dallas financial advisors.

Clients can also choose between hourly and fixed fee arrangements for financial planning and consulting services, the costs of which are clearly outlined in their ADV.

Experienced Team

The Heritage Financial Planning team is highly experienced in the financial industry, with each member of the financial planning team carrying the Certified Financial Planner™ designation, among other professional certifications.

HFP also maintains a Wealth Enhancement Team, which consists of a Certified Admissions Advisor and a Social Security Specialist, providing college funding advice and tax planning to add unique value to their Dallas financial advisor services.

Founder and Principal Steve Blankenship brings with him over a decade of financial expertise through formal education, real world experience, and his relationships with other award-winning financial advisors, providing a solid foundation of expertise for the team as a whole.

Rating Summary

As a fee-only and independent financial advisor, Heritage Financial is not driven by sales or commission-based advice, earning their clients' trust by working to empower them to make the best financial decisions possible.

This drive to empower clients is clearly seen through their [Resource Center](#), a selection of videos and presentations to support financial education.

With a talented and experienced team, flexible pricing options, and a fee-only commitment, HFP earns a full 5-star rating as one of the best financial advisors in Dallas.

Popular Article: [Top Financial Advisors in Seattle, Bellevue, Kirkland \(Washington State\)](#)

HFS Wealth Management Review

As a top fee-only financial advisor in Dallas, [HFS Wealth Management](#) strives to be more than just investment managers by providing comprehensive, expert financial services.

Since 1994, HFS Wealth Management has been offering three primary wealth management services to individuals, families, business owners, and institutions: Planning, Consulting, and Investments.

Key Factors That Enabled HFS to Rank as a Top Wealth Management Firm in Dallas

A 3-Tiered Approach

With financial planning, consulting, and investment management at the forefront of their services, HFS will give you the tools you need to create, execute, and manage your financial goals.

Below, please find a brief overview of what each tier of service offers:

Planning:

- Establish a financial position
- Retirement and goal planning
- Estate planning
- Investments
- Risk management
- Managing tax income

Consulting:

- Business planning
- Marital financial planning
- Complete estate planning strategies
- Foundation and endowment planning

Investments:

- Protecting wealth/risk management
- Thinking outside the box/creative investing
- Marriage of investing with planning/holistic approach
- Three phase investment process:



PLANNING

A goal without a plan is just a wish



CONSULTING

Financial advice doesn't always fit in a box



INVESTMENTS

A unique approach tailored to meet your needs

HFS Wealth Management

Total Digital Access

As a top management firm in Dallas, your financial world is at your fingertips with HFS Wealth. Clients have around-the-clock access to their financial information through online access points like:

- HFS Wealth Management Board: Your main "control center," your "living" financial plan. Browse with complete security and manage your entire financial world from one place.
- HFS Investment Portal: To take a consolidated look at your investment portfolio, you'll be able to manage and monitor your investments with ease. Holdings, draws, expenses, income, gains, and losses are updated daily.
- Custodian Account Access: HFS Wealth holds custodian accounts with Charles Schwab, TD Ameritrade, and Jefferson National, meaning that by becoming a client of HFS Wealth, you become a client of theirs, too. You can login for a variety of additional services.

Rating Summary

With a large investment team of qualified Dallas financial advisors, HFS Wealth is in a great position to help clients conquer a range of financial challenges.

Their focus on objectivity and fee-only compensation helps to instill trust between advisor and client, supporting the firm's goal of delivering comprehensive, personalized advice, earning HFS Wealth an overall 5-star rating.

Read More: [Top Financial Advisors in Portland, Oregon](#)

Lee Financial Review

With over 40 years of history serving their clients, [Lee Financial](#) has been offering financial planning and investment management services as a [fee-only](#) wealth management firm for quite some time.

As an independent financial advising firm, their services are best suited for physicians, entrepreneurs, executives, and widows or widowers, to name a few, who have at least \$1.5 million in investable liquid assets or a combined annual income of \$500,000.

Key Factors That Enabled Lee Financial to Rank as a Top Wealth Management Firm in Dallas

WholeVision Approach

At the center of operations at Lee Financial lies their trademarked [WholeVision approach](#). This approach is founded on the premise that "the whole is greater than the sum of its parts".

The integrated process involves four primary forms of capital, as outlined below.

Human Capital

This is a unique characteristic focused on by Lee Wealth. It stands for the non-tradable asset of each person as an individual. Through life experiences, job skills, and personal tastes and talents, each person holds their own human capital, and this area is integrated into the WholeVision model.

Financial Capital

Based on your human capital, this is a representation of financial assets which are invested to help you achieve long-term goals such as financial security, working capital for entrepreneurs, and support obligations.

Fulfillment Capital

This area is the chosen lifestyle and personal rewards that people make room for. These costs usually evolve over time and are largely based on the success of human and financial capital.

Shared Capital

Shared capital is the allocation of assets that need to be set aside for purposes such as family trust funds, philanthropic purposes, or for income or estate taxes.



Lee Financial

Service Offerings

No matter what your ultimate investing goal is, you may stand to benefit from Lee Financial's comprehensive planning and investment management services:

Financial Planning:

- Goal definition
- Education planning
- Tax planning
- Retirement planning
- Insurance planning
- Estate planning
- Business planning
- Inter-generational wealth transfer
- Charitable foundation management
- Philanthropic counsel

Investment Management:

- Alternative assets
- Cash and other investments
- Private equity
- Equities
- Real assets

- Real estate
- Tax-exempt bonds
- Taxable bonds

Rating Summary

As a fee-only fiduciary, Lee Financial sets itself apart not only by their client-centric focus, but also from their highly skilled team, access to alternative investments, and independent research team.

Although their minimum investment may be higher than most, this financial planner in Dallas provides the skills and capabilities necessary to handle complex financial challenges of high-net-worth clients, earning the firm a 5-star rating overall.

Related: [Top Financial Advisors in Phoenix and Scottsdale, Arizona](#)

Paradigm Advisors, LLC Review

Based in Dallas, Texas, and Fayetteville, Arkansas, [Paradigm Advisors, LLC](#) provides fee-only financial planning built on a strong foundation of support.

Founded by [Michelle Underwood Gass](#), the team of Dallas financial advisors seeks to provide clients with financial guidance, clarity, and objectivity.

Although Paradigm Advisors has a physical location in Dallas, their wealth management services are not confined to the metro area—as a virtual practice, the firm can work seamlessly and efficiently with clients anywhere in the state, country, or across the world.

Key Factors That Enabled Paradigm Advisors to Rank as a Top Wealth Management Firm in Dallas

Accessible Financial Planning

Before working with financial advisors in Dallas, clients often need to have a substantial amount of money saved up to meet high account and investment minimums.

While this is a great way for Dallas financial advisors to target a specific client base, it can be challenging—or impossible—for some potential clients to meet these minimum requirements.

For Paradigm Advisors, building a strong financial foundation is not about how much money you have, or how established you are in your career. This Dallas financial advisor firmly believes that financial planning is appropriate for all levels and all walks of life, increasing accessibility.

The Explorers & The Masters

While many Dallas financial advisors provide overviews of their unique client, Paradigm Advisors takes a unique approach, separating clients into Explorers and Masters.

Explorers are often independent professionals, entrepreneurs, or freelancers in the early stages of their career who are considering big financial decisions like buying a house, starting a family, or switching careers.

Masters are financially stable professionals that value expert feedback on life changes like retirement strategies, education for their children, buying a second home, or supporting elderly parents.

Rating Summary

Paradigm Advisors may be one of the smallest Dallas wealth management firms on our list, but they are also one of the most qualified firms, making them a unique choice for potential clients.

Their professional affiliations and accreditations constitute an impressive list, including NAPFA, FPA®, CFP®, CFA®, AICPA, XY Planning Network, and more.

With a client-centric philosophy, a personalized approach, and a wide range of professional certifications, Paradigm Advisors is a great Dallas financial advisory firm to consider partnering with this year.

Don't Miss: [Best Financial Advisors in Boston, Massachusetts](#)

SFMG Wealth Advisors Review

Based in Plano, [SFMG Wealth Advisors](#) strives to instill financial confidence in their clients, bringing varied backgrounds and years of experience together to craft customized, comprehensive plans.

This [fee-only](#) wealth management firm in Dallas is director-owned, meaning that their Dallas financial advisors are not obligated to push any particular products over others.

This independence fosters an environment for financial advice that is truly unbiased and best-suited to each client's unique financial situation, making SFMG Wealth Advisors one of the best financial advisors in Dallas to consider partnering with.

Key Factors That Enabled SFMG to Rank as a Top Wealth Management Firm in Dallas

Client Relationship Philosophy

SFMG has a clear mandate: to provide advice that inspires confidence in their clients by producing successful outcomes.

These Dallas financial advisors can help clients manage their affairs and live with financial confidence. The core tenets of their philosophy for wealth management in Dallas include:

- Promoting and providing total transparency
- Filtering out the nonsense and communicating the essentials
- Eliminating obstacles
- Meeting regularly to ensure you are on course towards your financial goals
- Leveraging the latest research and technology to help clients make the best decisions

Comprehensive Wealth Management

Your SFMG financial advisor in Dallas will coordinate all the various features of your financial planning. This includes partnering with the team of professionals you may already work with, including attorneys, tax accountants, and more.

No matter what your financial goals may be, this wealth management firm in Dallas will work with you to come up with a plan that incorporates these players and elements.

This comprehensive wealth management includes the following financial planning services:

- Net worth/cash flow statements
- Education planning
- Corporate benefits
- Retirement planning
- Tax planning
- Advice for business owners
- Insurance planning
- Charitable planning
- Estate planning

Rating Summary

Integral to SFMG's inclusion on our list of the best financial advisors in Dallas is their dedication to providing financial services as a fee-only, fiduciary advisor.

As an RIA, SFMG Wealth Advisors is not only deeply committed to acting in their clients' best interests, but they are also legally obligated to do so, providing a solid foundation for confidence and trust within the client-advisor relationship.

However, while the firm provides unique and skilled financial management services for their clients, SFMG ultimately earns a 3-star rating due to their website design and function.

Compared to other top Dallas wealth management firms, the SFMG website is slightly cluttered and difficult to navigate (particularly via mobile access), which could be challenging for potential clients when evaluating the firm's services.

Popular Article: [Best Financial Advisors in Houston, Texas](#)

Tolleson Wealth Management Review

[Tolleson Wealth Management](#) is a Dallas-based wealth management firm exclusively focused on serving ultra-high-net-worth clients.

Started by a personal need to manage high levels of wealth within the Tolleson family, these Dallas financial advisors have extended their understanding of the unique needs of affluent families.

While they do not explicitly state that they are fee-only, they maintain a commitment to [objectivity](#), meaning that the firm does not offer products, accept commissions, or provide fee sharing agreements from an outside firm.

Key Factors That Enabled Tolleson Wealth Management to Rank as a Top Wealth Management Firm in Dallas

Strategic Wealth Management Services

According to Tolleson Wealth, they do not pursue any one singular investment strategy. Instead, they focus on the desires of their clients and craft portfolios tailored to those needs.

Due in part to the vast capital overseen by this top wealth management firm in Dallas, clients have extended access to services usually unavailable to individual accounts, listed in the graphic below.



Tolleson Wealth Management

Private Banking

Banking is central to a fully integrated financial management plan. For this reason, Tolleson Private Bank was created to serve all its clients with in-house private banking options.

This financial advisor in Dallas offers the same services as large corporate institutions, but they do so while still maintaining exceptional personal relationships with their clients.

Traditional Services:

- Checking Accounts
- Money Market Accounts
- Mobile Banking

- Online Banking
- Visa Debit Cards
- Credit Cards
- Certificates of Deposit
- ATM Cards

Customized Credit Solutions:

- Mortgage Loans
- Land Loans
- Investment Loans
- Personal and Business Loans
- Lines of Credit
- Letters of Credit
- Overdraft Protection Lines
- Aircraft and Yacht Financing

Rating Summary

With a boutique focus on providing seamless, client-centric services for ultra-high-net-worth individuals and their families, Tolleson Wealth Management is one of the top Dallas wealth management firms.

Ultimately, Tolleson Wealth Management sees themselves as trusted, unbiased advisors to successfully manage affluent wealth.

While our review could not concretely confirm whether Tolleson Wealth Management operates on a fee-only basis, their boutique focus means that this is likely not a pressing concern for their client base, maintaining the firm's 5-star rating.

True North Advisors Review

Founded in 2000, [True North Advisors](#) was created with one sole purpose: to help clients lead more fulfilling lives through expert Dallas wealth management services.

Today, the firm boasts over \$1 billion in assets under management, providing objective and conflict-free advice as a financial advisor in Dallas.

Although they do not explicitly say that they are a fee-only firm, True North Advisors does state that they adhere to a [fiduciary commitment](#) while earning nothing from product sales or commissions.

Key Factors That Enabled True North to Rank as a Top Wealth Management Firm in Dallas

Large, Talented Team

One of the most obvious advantages clients have when partnering with True North Advisors is the opportunity to benefit from a diverse range of professional experiences and certifications.

The staff at True North Advisors carries a range of professional certifications and qualifications, including CFA®, CAIA®, CFP®, and more.

Additionally, the Dallas financial advisors at True North are sorted into specific teams to best utilize their financial skills and serve clients, which includes:

- Business Development
- Business Operations
- Client Financial Planning
- Client Operations
- Client Wealth Management
- Institutional Services
- Investment Policy Committee
- Investments/Research
- Leadership



True North Advisors

The Three-Sixty Process

As a top financial advisor in Dallas, True North believes that establishing trust is the most important part of financial management, which is why they created The Three-Sixty Process.

This proprietary process aims to get to know each clients' unique goals and financial situation in a no-fee, no-obligation series of meetings, each designed to answer specific wealth management questions:

- Who are you?
- What is possible?
- Where are we going?
- When do we start?

With a focus on truly getting to know each client, The Three-Sixty Process is a comprehensive way to guarantee that the wealth management process will be beneficial, productive, collaborative, and truly personalized.

Rating Summary

True North Advisors offers an expert and personalized approach to Dallas wealth management, including a collaborative focus, dedication to conflict-free money management, and a truly comprehensive “getting to know you” process.

Even their website communicates an energetic passion for financial management, offering a fresh take on financial planning in Dallas.

With a fiduciary commitment and a vibrant dedication to providing expert financial services, True North Advisors is one of the best financial advisors in Dallas to consider partnering with this year.

Conclusion – Top Dallas Financial Advisors, RIAs, and Planners

After carefully reviewing this list of the top financial advisors in Dallas, you no doubt have a better grasp of which services you may want and need.

Even after whittling down this list to a few favorites, you may still be stuck about which wealth management firm in Dallas to choose.

In these cases, you can request a free consultation or second opinion, as many financial advisors in Dallas offer these services. This is a great way to evaluate the partnership before making a commitment.

It's also recommended that you write down what you hope to gain out of a relationship with one of the top Dallas financial advisors to better define your goals.

While there is no one-size-fits-all financial advisor in Dallas, Texas, we have no doubt that there is a provider on our list that will match or even exceed your expectations.

Rate Table Disclaimer

Click here to read AdvisoryHQ's [disclaimer on the rate table\(s\) displayed](#) on this page.

Image sources:

- <https://www.bigstockphoto.com/image-70662682/stock-photo-dallas-cityscape-at-the-night-time>
- <https://www.bh-co.com/>
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