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# 8 Best Financial Advisors & Wealth Management Firms in Philadelphia, PA | 2018 Ranking

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## RANKING & REVIEWS BEST FINANCIAL ADVISORS IN PHILADELPHIA

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### 2018 Ranking of the Top Financial Advisors in Philadelphia, Radnor, Malvern, and Wayne, PA

When selecting a financial advisor or wealth management firm in Philadelphia and the surrounding area, you want a firm you can trust.

What's harder to pinpoint is knowing how to identify which Philadelphia financial advisors are trustworthy, and which ones are not. To make matters worse, some wealth managers might promise the moon, thereby making themselves appear extremely attractive to prospective clients.

It's natural to gravitate toward wealth management firms in Pennsylvania that make big promises. After all, who *doesn't* want high rates of return in shorter-than-usual time frames with almost zero risk?

But you should know better than to blindly believe these kinds of financial planners.

Sure, you want good rates of return, but you don't feel comfortable violating your risk threshold. You want to hit your short-term goals, but not at the expense of high taxes, draining operational costs, or hidden fees and commissions.



*Award Emblem: Top 8 Best Financial Advisors in Philadelphia, PA*

You also don't want a Philadelphia wealth management firm that sacrifices your long-term goals just to meet your short-term ones. You want a Philadelphia financial planner that sticks around to see those long-term goals become a reality.

The best financial advisors in Philadelphia are those that can offer advice through every stage of life—through the good, the bad, and the uncertain—for as long as you need.

We understand your need to hire only the best financial planners in and around Philadelphia. To that end, we've provided an in-depth overview of some of the best financial advisors in Philadelphia and the surrounding areas to help you identify the Philadelphia financial planner that fits your needs.

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## **Top 8 Best Financial Advisors in Philadelphia, PA | Brief Comparison & Ranking**

<b>Best Financial Advisors in Philadelphia</b>	<b>Highlighted Features</b>	<b>Ratings</b>
Abacus Wealth Partners	Comprehensive approach to financial planning	5
Addis & Hill	Proprietary Blueprints <sup>SM</sup> financial planning process	5
Blue Bell Private Wealth Management	Diversified investment opportunities	5
Hoover Financial Advisors	Transparent, client-centric approach	5
McAdam Financial	Unique, hybrid RIA model	5
RTD Financial Advisors, Inc.	Personalized financial planning	5
TGS Financial Advisors	Dynamic Contrarian Portfolio Strategy	5
Wescott Financial Advisory Group, LLC	Life-Minded Wealth <sup>TM</sup> approach to financial planning	5

*Table: Top 8 Best Financial Advisors in Philadelphia | Above list is sorted alphabetically*

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## **Tips for Selecting the Best Philadelphia Financial Wealth Management Firm**

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

First, take a close look at what each financial advisor in Philadelphia 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?



### *Best Financial Advisors in Philadelphia*

As you will see in the following reviews for Philadelphia financial planners, each firm 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 financial planner in Philadelphia that offers a broader range of services.

Once you've narrowed down your choices to a select few of these top-ranking Philadelphia financial planners, 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 Philadelphia before committing to their services.

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## **AdvisoryHQ's Selection Methodology**

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

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

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## Detailed Review – Best Financial Advisors in Philadelphia, PA

Below, please find the detailed review of each firm on our list of the best wealth management firms in Pennsylvania. We have highlighted some of the factors that allowed these Pennsylvania financial advisory firms 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.

- [Abacus Wealth Partners](#)
- [Addis & Hill](#)
- [Blue Bell Private Wealth Management](#)
- [Hoover Financial Advisors, PC](#)
- [McAdam Financial](#)
- [RTD Financial Advisors, Inc.](#)
- [TGS Financial Advisors](#)
- [Wescott Financial Advisory Group, LLC](#)

Click below for previous years’ rankings:

- **2016 Review:** [Top 8 Best Financial Advisors in Philadelphia](#)
- **2017 Review:** [Top 7 Best Financial Advisors in Philadelphia](#)

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## Abacus Wealth Partners Review

[Abacus Wealth Partners](#) is an independent advisor with six locations in California and one in Philadelphia.

As a top financial advisor in Philadelphia, Abacus offers comprehensive wealth and investment management as a [fee-only](#) firm with a fiduciary commitment, allowing them to maintain their independence and commitment to their clients.

**Key Factors That Enabled Abacus Wealth Partners to Rank as a Top Wealth Management Firm in Philadelphia**

## Comprehensive Financial Planning

These financial advisors in Philadelphia can help clients create a flexible financial plan that can face all kinds of possible circumstances.

For example, a client may decide to move to another state, make a career change, start their own business, get audited by the IRS, buy a house, have kids, and more.

Your Philadelphia financial advisor will draft a comprehensive plan to prepare for life changes, covering the six main areas of financial planning:

- **Impact**—A financial advisor in Philadelphia will help you plan philanthropic initiatives that align with your values
- **Goals**—Your Philadelphia financial advisor will discover what financial goals are important to you and your family
- **Money**—Partnering with your Philadelphia planner, you will determine how much you need to save, how to make tax-efficient charitable contributions, portfolio allocation, and more
- **Safety**—Helps protect you from risk and any unexpected life events
- **Taxes**—Ensures that you are not paying more taxes than necessary
- **Death**—This Philadelphia wealth firm will help you create an estate plan that minimizes tax burden



*Abacus Wealth Partners – Comprehensive Financial Planning*

**Value-Driven Services**

As a top Philadelphia financial planner, Abacus abides by a set of clearly defined principles and values. These include:

- **Serve Others**—Putting the needs of clients, the team, and the community above the needs of the firm
- **Bring Genius**—These Philadelphia financial planners spend time doing what they are best at, and what they love the most
- **Listen Deeply and Speak with Care**—Always tell the truth, and approach each financial conversation with an open mind
- **Enjoy**—Provide a financial planning experience that clients will truly enjoy

To demonstrate these values in action, Abacus participates in sustainable investing initiatives, provides pro bono financial planning services for qualified individuals and families, maintains a charitable grant, and supports women in the financial industry through Abacus Sisterhood.

## Clearly Defined Investment Philosophy

Investment management can be tricky if you don't have any prior experience.

- Focus on what you can control
- Manage your emotions
- Be mindful of your impact
- Don't try to outguess the market
- Resist chasing past performance
- Practice broad diversification
- Consider the drivers of returns
- Let markets work for you
- Avoid market timing
- Follow your passion

## Rating Summary

As an independent, fiduciary, and fee-only Philadelphia wealth management firm, Abacus provides a depth of value to their clients.

Not only can they tackle financial planning and investment management, but the firm also puts a strong focus on financial education, offering educational events, keynote speeches, free financial check-ups, and access to published research.

With a firm dedication to independence and a commitment to serving the best needs of their clients, Abacus Wealth Partners earns a 5-star rating as one of the best firms offering wealth management in Philadelphia.

***See Also: Best Financial Advisors in New York, NY – Ranking & Comparison***

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## Addis & Hill Review

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Located just outside of the city in Wayne, [Addis & Hill](#) is a [fee-only](#) firm offering comprehensive financial planning and wealth management in Philadelphia and its surrounding areas.

Financial services offered through Addis & Hill are built to support long-term client relationships, providing expert guidance for retirement, education planning, portfolio construction, real estate investments, budgeting, taxes, and more.



## **Key Factors That Enabled Addis & Hill to Rank as a Top Financial Planner in Philadelphia**

### **Blueprints<sup>SM</sup> Planning Process**

At Addis & Hill, each new client engagement begins with the Blueprints<sup>SM</sup> planning process, a proprietary method of building a solid financial foundation within the client-advisor relationship.

Through the Blueprints<sup>SM</sup> process, clients can benefit from:

- **Organization**—The Philadelphia financial advisors at Addis & Hill aim to help clients get their financial “house” in order
- **Accountability**—The firm follows through on their commitments, and encourages clients to do so as well
- **Objectivity**—Each Philadelphia financial planner at Addis & Hill is committed to providing objective advice, avoiding mistakes that often accompany emotion-based decisions
- **Proactivity**—Every financial plan is created to anticipate what is coming and to create actionable plans for the future
- **Education**—Addis & Hill works to improve the financial literacy of their clients, empowering them to make good financial decisions
- **Partnership**—These financial planners in Philadelphia work with their clients, creating a true sense of partnership

### **Wide Range of Financial Services**

For many clients, partnering with a top financial advisor in Philadelphia means finding a firm that can continue to provide expertise and value over time.

Financial goals and needs are subject to fluctuate from one year to the next, and firms that offer a wide range of financial services provide clients with the ability to adjust their goals accordingly over time.

These Philadelphia financial planners are prepared to address a wide range of financial challenges, including:

- Spending & Cash Flow Management
- Investment Planning
- Real Estate & Debt
- Pensions & Social Security Planning
- Education Planning
- Tax Mitigation
- Wealth Transfer
- Charitable Planning

## **Rating Summary**

While Addis & Hill may have one of the smallest teams on our list of the best financial advisors in Philadelphia, this boutique structure provides clients with the opportunity for one-on-one financial planning and wealth management.

This makes the firm a great choice for clients that value customer service and dedicated attention, a focus that is exemplified through their proprietary Blueprints<sup>SM</sup> process.

With a fee-only structure and a wide range of financial services to choose from, Addis & Hill earns a spot among the best Philadelphia financial planners to consider partnering with this year.

***Don't Miss: Top Financial Advisors in Denver, Colorado Springs, and Boulder (Colorado)***

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## **Blue Bell Private Wealth Management Review**

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With over 80 years of combined experience between their advisors, [Blue Bell Private Wealth Management](#) is located in the Philadelphia suburb of Blue Bell.

As one of the top Philadelphia wealth management firms, Blue Bell prioritizes building long-term relationships with clients, guaranteeing that each one leaves more financially secure than when they arrived.

Blue Bell Private Wealth Management is a [fee-only](#) Philadelphia wealth management firm.

### **Key Factors That Enabled Blue Bell Private Wealth Management to Rank as a Top Wealth Management Firm in Philadelphia**

#### **Diversified Investment Opportunities**

Investing comes with a lot of choices and no guarantees. It is far from gambling, but it does involve risk, and navigating those risks requires experience and expertise.

Without a solid understanding of the market, inexperienced investors may choose securities haphazardly and wind up with an underperforming portfolio as a result. This is why investors can benefit from the wealth-generating knowledge of a Philadelphia wealth management firm.

The team of Philadelphia financial advisors at Blue Bell helps clients diversify their investment portfolios and make strategic, thought-out choices. Potential investment options include:

- Closed-end funds
- Structured investments
- Exchange-traded funds
- Options strategies

Blue Bell also provides information on these investment options for people who want to know a little bit more before committing to their services for wealth management in Philadelphia.

### **Comprehensive Educational Resources**

Blue Bell provides a page with comprehensive financial education resources. Financial advisors in Philadelphia and elsewhere sometimes make the assumption that their clients know more about money than they do.

A client may be brilliant in one area of their financial health, but lack knowledge when it comes to complicated money matters.

This is where accessible resources come in handy. Blue Bell's resources page includes information for several levels of experience.

They have general links to site like the Wall Street Journal and Yahoo! Finance, but they also have more specific links for closed-end funds, exchange-traded funds, inheritance tax, and more.

### **Rating Summary**

As a fee-only firm with a fiduciary commitment, Blue Bell Private Wealth Management provides clients with the ideal wealth management relationship.

All fees are transparent, and all recommendations are made solely in the best interest of the client, encouraging trust and laying the foundation for a rewarding, long-term wealth management relationship.

With a wide range of investment options and a legal obligation to put the needs of the client first and foremost, Blue Bell Private Wealth Management is one of the best Philadelphia wealth management firms to consider partnering with this year.

***Related: Best Financial Advisors in Atlanta, Georgia***

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## Hoover Financial Advisors, PC Review

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Founded in 2005, [Hoover Financial Advisors, PC](#) is a Philadelphia registered investment advisory firm based in the suburb of Malvern, PA.

As a [fee-based](#) wealth management firm, it's important to note that the Philadelphia financial planners at Hoover Financial Advisors may earn additional compensation from insurance products or referral fees.

However, we have chosen Hoover Financial Advisors as a top Philadelphia financial advisory firm due to their independence, fiduciary commitment, scale of services, and client-centric approach.

### **Key Factors That Enabled Hoover Financial Advisors, PC to Rank as a Top Wealth Management Firm in Pennsylvania**

#### **Transparent, Client-Centric Approach**

As a top financial advisor in Philadelphia, Hoover Financial Advisors applies objectivity and honesty to all their Philadelphia wealth management and financial advisory services.

Because the firm is independent, Hoover Financial Advisors is not pressured to sell proprietary products or operate under corporate responsibilities, a key element in finding unbiased Philadelphia wealth management services.

Additionally, although the firm uses a fee-based approach, each Philadelphia financial advisor at Hoover is also a fiduciary, which naturally counteracts many of the inherent conflicts of interest associated with fee-based firms.

Hoover Financial Advisors' commitments to independence, a fiduciary responsibility, and unbiased advice provides a strong, client-centric foundation for wealth management and financial planning.

#### **Wide Range of Expert Services**

As a team, Hoover has amassed more than 300 years of experience in the financial advisory industry.

These Philadelphia financial planners have transformed this knowledge and experience into a broad range of investment management and financial planning services. While not a complete list, clients of Hoover Financial Advisors can benefit from services like:

- Customized portfolios based on client goals and objectives
- Proactive portfolio rebalancing
- Tax loss harvesting
- Dollar cost averaging
- Asset allocated investment approach
- Financial planning and strategies based on long-term goals
- Ongoing monitoring and periodic updates
- Coordination of investment management strategy with financial planning

With a wide range of Philadelphia wealth management and financial planning services backed by centuries of experience, clients can rest assured that these Philadelphia financial advisors are prepared to expertly address a variety of financial challenges.



*Best Financial Advisors in Philadelphia*

### **Rating Summary**

In addition to the attributes mentioned above, the Hoover Financial team of Philadelphia financial planners excels at understanding the value of teamwork, a key element in a successful, comprehensive financial plan.

Clients can benefit from the collective experience and input of a financial planner, an investment manager, an insurance specialist, and a CPA, effectively covering all areas of financial health.

By adding a focus on collaboration to their comprehensive service listings and fiduciary commitment, Hoover Financial Advisors earns a spot among the best financial advisors in Philadelphia to consider partnering with this year.

***Popular Article: Top Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota)***

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## **McAdam Financial Review**

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Founded in 2008, [McAdam Financial](#) is one of the fastest-growing private companies in America, with offices in Tysons Corner, Chicago, Central New Jersey, Boston, and Philadelphia.

With an integrated platform of financial services and tools, McAdam strives to deliver exceptional Philadelphia wealth management by focusing on each client's financial, personal, and professional life.

As a [hybrid RIA](#), McAdam provides a unique fee structure for financial planning and wealth management. This means that the firm provides both fee-only financial planning and fee-based investment management services to clients.

### **Key Factors That Enabled McAdam Financial to Rank as a Top Philadelphia Wealth Management Firm**

#### **Advanced Advisory Model™**

As the cornerstone of McAdam's financial approach, the Advanced Advisory Model™ integrates three core areas of financial planning: Financial, Personal, and Professional.

This top financial advisor in Philadelphia defines financial planning as a combination of Products, Knowledge, Trends, and Opportunities.

Personal financial planning includes Lifestyle, Family, Retirement, and Special Needs, like unique healthcare concerns or family hardships. Professional financial planning looks at four different landscapes: Career, Benefits, Risk, and Investments.

Each aspect of financial planning is both unique and comprehensive, covering many areas that traditional Philadelphia financial advisors may leave out.



McAdam  
Advanced Advisory Model™



*Best Financial Advisors in Philadelphia*

**Comprehensive Services**

As one of the top Boston financial advisors, McAdam offers clients a wide range of services to take advantage of and improve their financial health.

These services are spread across Financial Planning, Wealth Management, Tax and Insurance Strategies, and Business Owner Services, including (but not limited to):

- 401(k) Strategies
- Retirement, Education, and Estate Planning
- Investment Income Strategies
- Investment Advisory Services
- Tax-Sensitive Investment Management
- Advanced Insurance Architecture
- Actuarial Plan Design
- Business Continuity Planning
- Qualified Retirement Plans

- Key Employee Retention Plans

## Rating Summary

With a hybrid pricing structure and a uniquely comprehensive approach to financial, personal, and professional financial planning, McAdam Financial is one of the top financial advisors in Philadelphia to consider partnering with, earning the firm a 5-star rating overall.

Additionally, locally-based clients will find that the firm is uniquely positioned to provide in-depth financial expertise, with three members of the McAdam leadership team based out of the firm's Philadelphia office.

However, with legal [maximum fees](#) ranging from 2.50% for accounts up to \$250,000 and 1.25% for accounts above \$10,000,000, McAdam's investment management fees could potentially be higher than those of competing financial advisors in Philadelphia on our list.

With that said, the firm's in-depth and unique approach can certainly make the cost worthwhile for many clients, maintaining the firm's position as a top financial advisor in Boston.

To obtain specific information on an individual advisor's average fees, we recommend that potential clients consult directly with a McAdam Financial advisor to receive a fee tailored to their unique financial situation and investment management needs.

***Read More: Top Financial Advisors in St. Louis, MO***

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## RTD Financial Advisors, Inc. Review

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Founded in 1983, [RTD Financial Advisors, Inc.](#) is a Philadelphia financial advisory firm with over thirty years of experience in financial planning and four offices in total across Pennsylvania.

While they do not specifically say that they are a fee-only firm, RTD maintains membership with the [Fee-Only Network](#) and [NAPFA](#), two leading financial industry organizations for fee-only firms.

Additionally, according to their [ADV](#), the firm does not accept commissions from investment products, sell insurance, or accept any compensation outside of their clients, solidifying RTD as a fee-only Philadelphia wealth management firm.



## **Key Factors That Enabled RTD Financial Advisors to Rank as a Top Wealth Management Firm in Philadelphia**

### **Flat Retainer Fee Structure**

RTD carries all the features that we look for in top financial advisors in Philadelphia. Namely, the firm maintains an independent structure, adheres to a fiduciary commitment, and operates under an open, transparent payment structure. Additionally, it is certified by the Centre for Fiduciary Excellence (CEFEX).

Their fee structure is what makes RTD especially unique. This financial advisor in Philadelphia charges a flat retainer fee that is adjusted every three years, rather than use fees based on a percentage of assets under management.

A flat retainer fee provides these Philadelphia financial advisors and their clients with four primary advantages:

- It reduces conflicts of interest
- It emphasizes holistic financial planning
- It pays advisors for what they can control
- It de-emphasizes risky asset allocation

Along with a transparent fee methodology, RTD also provides a full listing of their financial planning fees for potential clients to evaluate before they even begin a relationship with the firm.

### **Personalized Financial Plans**

The Philadelphia financial planners at RTD strive to create a financial plan that addresses a three-step process to financial planning, which includes:

#### Discover

True to its name, this stage involves your Philadelphia financial planner getting to know you. They learn who you are, what you want to do with your wealth, your goals for family, your business, and so on.

Considerations such as cash flow, financial health, taxes, and insurance, among others, are included.

#### Plan

In this phase, your Philadelphia financial advisor will build your financial roadmap. Every possible consideration is included during the plan's construction, all with an eye toward making your financial goals, both short- and long-term, a reality.

## Live

Once you and your advisor agree on the specifics of your plan, it is finalized and implemented. You then get to experience life to its fullest, without worrying about whether you're adequately preserving your wealth or on-track to meet your goals.



*Top Philadelphia Wealth Management Firms – RTD Financial Advisors*

### **Comprehensive Financial Planning Services**

RTD's services can be divided up between its Primary Services and its Comprehensive Planning Services. Between the two categories, the firm can create better, more customized plans that address a wider range of client needs.

Primary Services include Financial Life Planning™, Investment Management, and Employer Retirement Plans

Its comprehensive planning services, for both individuals and businesses, include specializations in:

- Income tax
- Retirement
- Investment planning
- Education planning
- Cash flow planning

- Estate planning
- Special needs planning
- Risk management
- Insurance planning
- Business, 401(k), and other retirement planning
- Employee benefit planning
- Philanthropy and charitable giving
- Stock option planning

## **Rating Summary**

For clients that want a personalized, comprehensive financial planner in Philadelphia, RTD Financial Advisors is a great fit.

Their fiduciary commitment and focus on transparency not only ensures that clients receive unbiased advice, but it also supports trust within the client-advisor relationship, a key element of any successful financial plan.

While RTD Financial Advisors does not specifically explain that they are fee-only, their wide range of affiliations with fee-only organizations and high level of transparency regarding specific dollar amounts for each service maintains the firm's 5-star rating.

With a fiduciary commitment and a fee-only structure, RTD Financial Advisors is one of the best financial advisors in Philadelphia to consider partnering with this year.

***Related: Best Financial Advisors in Charlotte, North Carolina***

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## **TGS Financial Advisors Review**

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Located thirty minutes outside of the city in Radnor, PA, [TGS Financial Advisors](#) is a [fee-only](#) Philadelphia wealth management firm offering both investment management and financial planning services.

Founded in 1990, TGS Financial Advisors specializes in helping individuals, families, retirees, and physicians build and maintain their wealth.

**Key Factors That Enabled TGS Financial Advisors to Rank as One of the Best Financial Advisors in Philadelphia**

## **Broad Range of Client Services**

TGS Financial Advisors serves over 250 households across 25 states, providing expertise working with a diverse range of client backgrounds, professions, and financial needs.

Of particular note are their financial planning and wealth management services for individuals and families, which include:

- Developing efficient spending, saving, and gifting strategies
- Managing risk by reviewing insurance coverage and recommending asset protection strategies
- Coordinating with other professionals like CPAs, estate attorneys, and insurance agents
- Guiding clients through important life transitions
- Assisting with multi-generational wealth planning
- Managing investments with a focus on global diversification, undervalued assets, and cost control

Along with individuals and families, TGS also specializes in helping physicians and retirees manage their financial health, providing a boutique focus that many financial advisors in Philadelphia often miss.

## **Dynamic Contrarian Portfolio Strategy**

As a top Philadelphia wealth management firm, TGS uses [Dynamic Contrarian Portfolio Strategy](#) to provide expert portfolio management, or DYCOPS™ Strategy.

This proprietary strategy includes five steps to asset allocation and portfolio management:

- **Diversification**—Asset classes are systematically diversified, and portfolios reflect unique tolerance levels for each client
- **Value Tilt**—Rather than following the volatile growth and decline of the market, TGS focuses on value for the highest returns
- **Contrarian Asset Allocation**—Historical price and yield data is used to determine relative value of asset classes
- **Focus on Costs**—Index funds, ETFs, and institutional-class shares are used to keep portfolios cost-efficient
- **Discretionary Management**—All portfolios are managed on a discretionary basis to ensure timely and consistent implementation

Ultimately, the DYCOPS™ Strategy is built to flow funds into underpriced asset classes during times of significant price differentiation, providing a systematic framework for these Philadelphia financial advisors to make timely portfolio management decisions.

## **Rating Summary**

As a fee-only firm with fiduciary commitment, TGS Financial Advisors offers clients the ideal financial planning relationship.

The firm is required to always put client interests before their own, to fully disclose any conflicts of interest, and to uphold the highest standards of transparency, supporting trust between each Philadelphia financial advisor and their clients.

TGS Financial Advisors also offers value through providing services specifically for physicians, retirees, individuals, and families, allowing these clients to benefit from a firm that understands their unique financial challenges.

With a broad range of personalized services, a proprietary investment approach, and a client-centric structure, TGS Financial Advisors is one of the best Philadelphia financial planners to consider partnering with this year.

***Don't Miss: Top Financial Advisors in Philadelphia, PA***

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## **Wescott Financial Advisory Group, LLC Review**

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Founded in 1987, [Wescott Financial Advisory Group, LLC](#) is a wealth management firm in Philadelphia that prioritizes strategy and proactivity when it comes to creating financial plans for its clients.

This Philadelphia wealth management firm is independent, SEC-registered, and operates on a [fee-only](#) basis. These factors allow clients to rest easy knowing the Philadelphia financial advisors serving them are concerned with putting their interests first.

### **Key Factors That Enabled Wescott Financial Advisory Group, LLC to Rank as a Top Wealth Management Firm in Pennsylvania**

#### **Tailored Planning for Individual Investors**

The advisors at this top Philadelphia wealth management firm select portfolio managers on their ability to reap returns, remain cool-headed during market fluctuations, and take calculated risks.

As a part of their tailored wealth management process, Wescott also combines active management with passive management. This allows them to manage risk while also consistently outperforming benchmarks, a desirable goal for most individual investors.

Investors will find that the Philadelphia financial advisors at Wescott can provide the following advantages:

- Customized, strategic asset allocation
- Ongoing investment manager selection
- Monitoring and performance measurement
- Performance and transaction analysis
- Market research, perspectives, and reports on strategic investment topics

### **Wescott Trust Services**

For individuals, families, and businesses, [Wescott Trust Services](#) provides comprehensive trust management, including the administration of revocable, irrevocable, special needs trusts, and estates.

By partnering with this segment of Philadelphia wealth management, clients can benefit from:

- **Expertise**—Wescott Trust Services and investment knowledge are combined to provide a comprehensive trust management experience
- **Cost-effective services**—Trust services are provided with fee-only, transparent, and competitive prices
- **Flexibility**—To achieve trust objectives and needs of the beneficiaries, clients can opt to work with co-trustees to share administrative responsibilities
- **Local support**—This Philadelphia wealth management branch combines face-to-face meetings with national coverage, ensuring that clients can receive local support and consistent trust management even during a relocation



*Best Wealth Management Firms in Philadelphia*

## **Rating Summary**

As a fee-only Philadelphia wealth management firm, Wescott Financial Advisory Group provides clients with the peace of mind that their investment management will be handled with transparency, cost-efficiency, and a fiduciary commitment.

This structure supports trust within the client-advisor relationship, a crucial element to any successful investment management plan. Additionally, Wescott provides comprehensive trust services, helping clients protect their wealth and instilling confidence about the future of their estates.

With a fiduciary commitment, a fee-only structure, expert portfolio management, and comprehensive trust services, Wescott Financial Advisory Group is one of the best wealth management firms in Philadelphia for investors to consider partnering with this year.

***Popular Article: Best Financial Advisors in Cincinnati, Ohio***

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## **Conclusion – Top 8 Financial Advisors in Philadelphia, Pennsylvania**

If you live in Pennsylvania, you have a lot of excellent options when it comes to choosing between Philadelphia wealth management firms.

Each financial advisor in Philadelphia and the surrounding area is concerned with one thing and one thing only: helping you to achieve your financial dreams. These financial advisors in Philadelphia treat you as a partner, investing in your success while you're investing in your future.

They only succeed—or rather, make money—when you succeed and make money, too.

The next step is to use this list of best financial advisors in Philadelphia and select a few that align with your personal financial goals. Once you create your own list of Philadelphia financial planners, you can schedule an initial consultation to determine ahead of time whether a prospective financial advisor is right for you.

No matter what financial advisor in Philadelphia you choose, partnering with an experienced wealth management firm is the best way to get your finances on track, plan for the future, and reach your goals.

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## **Rate Table Disclaimer**

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

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