
Top 10 Best Financial Advisors in Greensboro, Chapel Hill & Winston-Salem, NC | 2018 Ranking

RANKING & REVIEWS BEST FINANCIAL ADVISORS IN GREENSBORO, CHAPEL HILL, & WINSTON-SALEM

Finding the Top Financial Advisors in Greensboro, Chapel Hill & Winston-Salem, North Carolina

Whether you have already entered retirement or are just starting out on the retirement journey, having a good financial advisor by your side can be the difference between financial success and financial hardship. The question is who are the best financial advisors in North Carolina?

The sheer number of financial advisors in North Carolina makes choosing just one a difficult task. But by developing a clear idea of the services you are looking for and doing proper research, the answers to the following questions will soon become clear:

- Where can you find the best financial planning, wealth management, and asset management services in North Carolina?
- Where should you go if you are looking for additional services like estate planning, tax management, and risk management?
- What types of fees do financial planners in North Carolina charge, and which financial advisor is best for you?

While the final decision rests in your hands, we have compiled a list of the top financial advisors in Greensboro, Chapel Hill, and Winston-Salem, North Carolina to help you jump-start your way to financial success.



Award Emblem: Top 10 Financial Advisors in North Carolina

Top 10 Financial Advisors in Greensboro, Chapel Hill & Winston-Salem | Brief Comparison & Ranking

Financial Advisors in North Carolina	Highlighted Features	Ratings
Delegate Advisors	Clear and value-based investment philosophy	5
Maestro Wealth Advisors	WealthGuard™ account monitoring system	5
Morton Wealth Management	Proactive Retirement®	5
Old Peak Finance	Comprehensive financial planning & wealth management	5
Salem Investment Counselors	Diverse, highly accredited team	5
Stearns Financial Group	Financial services for women	5
Triad Financial Advisors	Independent, fee-only, and fiduciary firm	5

Woodward Financial Advisors	Clear wealth management process	5
DMJ Wealth Advisors, LLC	Financial services and resources for women	3
Eton Advisors	Comprehensive Family Office services	3

Table: Top 10 Financial Advisors in Greensboro, Chapel Hill & Winston-Salem, NC | Above list is sorted by rating

Fee-Based vs Fee-Only North Carolina Financial Planners

When it comes to evaluating financial advisors in Greensboro, Chapel Hill, or Winston-Salem, there are typically two types of firms to consider: fee-only and fee-based advisors.

How do you know which type of firm offering wealth management in North Carolina is right for you?

Below, we'll provide you with a brief overview of everything you need to know about the differences between fee-based and fee-only financial advisors in North Carolina.

Fee-Only Pricing Structure

When financial planners in North Carolina say that they are "fee-only," this means that they *do not* accept commissions or third-party referral payments.

Because an advisor's only source of income comes from the client, a fee-only pricing structure minimizes the inherent conflicts of interest that come along with recommending and selling investment products.

In short, a fee-only financial advisor in Greensboro, Winston-Salem, or Chapel Hill is in a better position to act solely in the interest of their clients.

Fee-Based Pricing Structure

Fee-based firms will receive *some* direct compensation from clients but are free to accept commissions from the companies who provide their financial products.

While a fee-based structure does create some potential conflict, many fee-based investment firms are also fiduciaries, which often counteracts the potential for conflict.

As a fiduciary, a financial advisor in Greensboro, Winston-Salem, or Chapel Hill is legally responsible to fully disclose any conflicts of interest and are required to put the interests of their clients ahead of their own, regardless of their pricing structure.

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— Best Wealth Management Firms in Greensboro, Chapel Hill, & Winston-Salem, NC

Below, please find a detailed review of each firm on our list of the best wealth management firms in Greensboro, Chapel Hill, and Winston-Salem, NC. We have highlighted some of the factors that allowed these financial advisors in North Carolina 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.

- [Delegate Advisors](#)
- [DMJ Wealth Advisors, LLC](#)
- [Eton Advisors](#)
- [Maestro Wealth Advisors](#)
- [Morton Wealth Management](#)
- [Old Peak Finance](#)
- [Salem Investment Counselors](#)
- [Stearns Financial Group \(SFG\)](#)
- [Triad Financial Advisors](#)
- [Woodward Financial Advisors](#)

Click below for previous years' rankings:

- **2016 Review:** [Top 10 Financial Advisors in Greensboro, Chapel Hill, and Winston-Salem, North Carolina](#)
- **2017 Review:** [Top 9 Financial Advisors in Greensboro, Chapel Hill, & Winston-Salem, NC](#)

Delegate Advisors Review

Founded in 2012, [Delegate Advisors](#) is an independent financial advisor in Chapel Hill, NC that specializes in providing multi-family office and Outsourced Chief Investment Officer (OCIO) services.

We could not verify whether this Chapel Hill financial advisor uses a fee-based or fee-only compensation structure, though the firm [does state](#) that they “do not receive commissions for products we recommend” and “are compensated only with client fees.”

As always, we recommend verifying fee structure before partnering with any financial advisor in Chapel Hill, NC.

Key Factors that Enabled Delegate Advisors to Rank as a Top Financial Advisor in Chapel Hill, NC

Strong Value Proposition

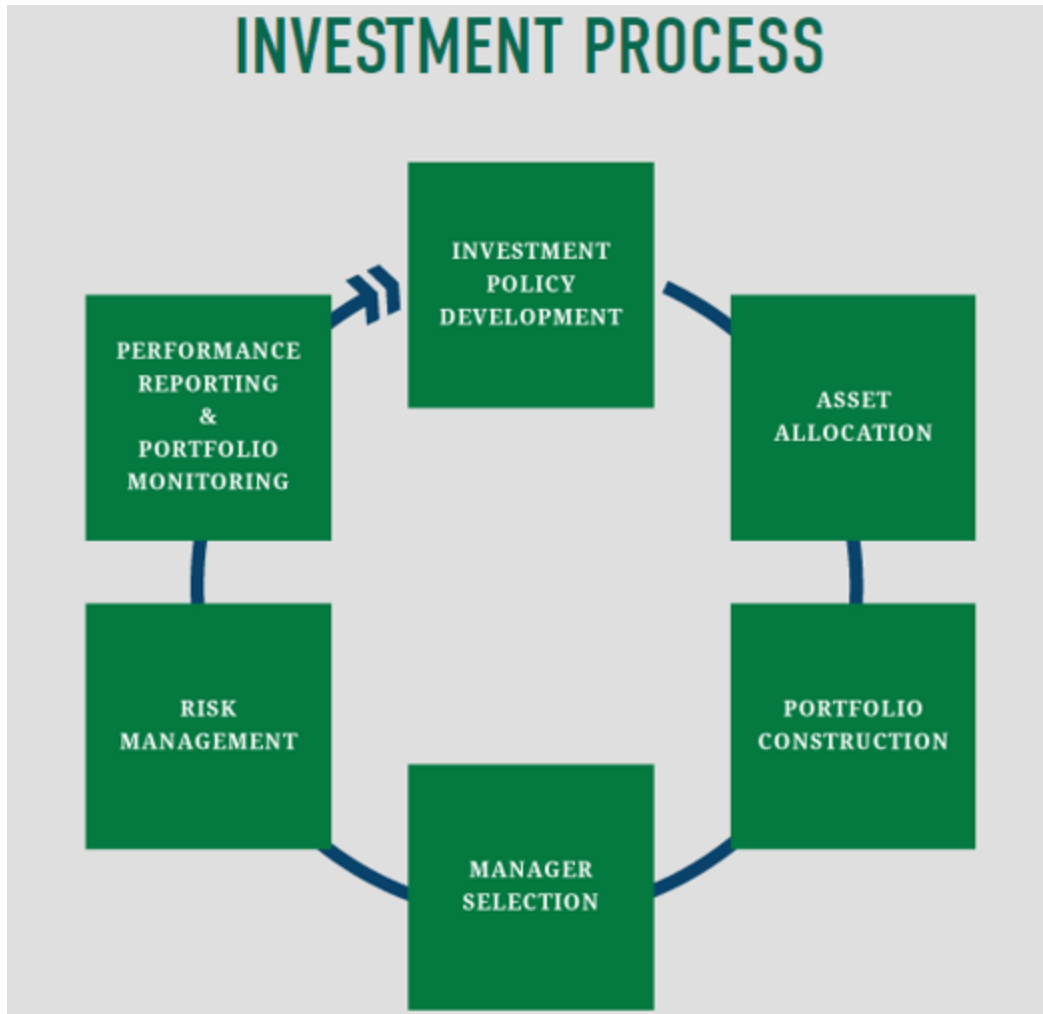
When it comes to selecting the best North Carolina financial advisors, one of the best ways to identify top-notch firms is by looking at their value proposition to clients. For Delegate Advisors, this includes:

- **Looking at the Horizon**—Financial plans are customized and unique, but always focused on achieving long-term goals
- **Patient but Flexible Capital**—These Chapel Hill financial advisors will keep your money on a steady path while remaining open to opportunistic changes
- **Believing in the Golden Rule**—Maintaining transparency and accountability every step of the way
- **Taking Your Time**—Rather than rush through financial decisions, Delegate Advisors prefers to check and recheck to minimize mistakes
- **Reduce the Noise**—Existing portfolios are thoroughly evaluated to improve efficiency, cost-effectiveness, and ease of management

Clear Investment Philosophy

The investment philosophy at Delegate Advisors is comprised of a set of clear, profound principles, which include:

- All costs matter
- Great ideas can come from anywhere
- Patient but flexible capital is key
- There is no risk like not understanding risk
- Common sense should be more common
- Know when to walk away



Delegate Advisors

Rating Summary

As a financial advisor in Chapel Hill, NC with a fiduciary commitment, Delegate Advisors places high value on transparency, honesty, and integrity—all key elements of any successful financial planning relationship.

With an experienced team, a clearly defined investment philosophy, and a strong value proposition, Delegate Advisors is one of the best financial planners in North Carolina to consider partnering with this year.

DMJ Wealth Advisors Review

[DMJ Wealth Advisors, LLC](#) is a financial advisor in Greensboro, NC that offers comprehensive financial planning and qualified retirement plan services.

It is not clear whether DMJ is a fee-based or fee-only wealth management firm in North Carolina. We advise all readers to verify a firm's compensation structure before starting a working relationship.

Key Factors that Enabled DMJ Wealth Advisors to Rank as a Top Financial Advisor in Greensboro, NC

Focus on Women

DMJ Wealth Advisors believes that women should have the confidence to make intelligent life decisions that are backed by financial knowledge.

The firm seeks to bolster that confidence by providing educational opportunities and advisors that understand the surprises that life can throw at us, some of which include divorce, the death of a spouse, and unexpected children.

Services for women provided by DMJ Wealth Advisors include:

- Financial plan development
- Investment placement and management
- Estate conservation
- Long-term care
- Qualified retirement programs
- Personalized investment tracking website
- Tax-efficient investing
- Life insurance assessment and policy acquisition

Additionally, the firm hosts Women in New Friendships and New Experiences (WN2). This program gives women the opportunity to join in a variety of fun activities, such as yoga and painting, with the purpose of making new connections for mentorship, encouragement, and company.



DMJ Wealth Advisors

Extensive Resources

DMJ Wealth Advisors offers clients an extensive range of resources to build their knowledge base. The resources fall under six basic categories: retirement, investment, estate, tax, money, and lifestyle.

- **Retirement:** Focus on the accumulation of money so that clients can attain the retirement lifestyle that they desire.
- **Investment:** Strategies designed to fit into clients' goals, time horizon, and risk tolerances.
- **Estate:** Helps educate to ensure that a client's wealth is distributed equally after passing.
- **Tax:** Educate clients on the variety of ways they can improve their tax situations.
- **Money:** Helps clients discover better ways to manage their money.
- **Lifestyle:** Focus on helping clients to imagine and create a lifestyle which suits their desires and financial targets.

Rating Summary

As a top Greensboro financial planner, DMJ Wealth Advisors excels at providing clients with the resources they need to improve their long-term financial health, particularly when it comes to empowering women and their relationship with money.

However, our firm could not find a statement of a fiduciary commitment, which is a crucial element of any financial planning relationship. Combined with an unverifiable fee structure, DMJ Wealth Advisors ultimately earns a 3-star rating among the top financial planners in North Carolina.

By adopting a fiduciary commitment and clearly stating their fee structure, EMJ Wealth Advisors could easily improve both their value proposition to new clients and their rating as a top financial advisor in Greensboro, NC.

See Also: Best Financial Advisors in Cincinnati, Ohio

Eton Advisors Review

[Eton Advisors](#) is a financial advisor in Chapel Hill, NC that provides family office services and wealth management services to ultra-high-net-worth clients with a multi-generational context.

This North Carolina wealth management firm's mission is to help families manage the complexities of their financial situations by creating integrated wealth structuring and investment consulting solutions based upon each family's needs, desires, and constraints.

We cannot verify whether this is a fee-only or fee-based wealth management firm. We advise readers to verify compensation structures before working with any financial advisor in Chapel Hill, NC.

Key Factors that Enabled Eton Advisors to Rank as One of the Best Financial Advisors in Chapel Hill, NC

Goal-Based Framework

While the means may vary, a solid financial plan is a crucial element of achieving your financial goals.

The North Carolina financial advisors at Eton use their goals-based investment framework to help clients do the following:

- Identify risk tolerances
- Identify nature and size of financial goals
- Determine the priority of different goals relative to each other
- Determine the respective time horizon for individual goals
- Conduct a cash flow analysis that prioritizes these goals
- Categorization of goals into Needs & Obligations, Priorities & Expectations, and Desires & Aspirations
- Sub-portfolios are created with different levels of risk based on the goal category (i.e. low risk assets in Needs & Obligations with higher risk assets in Desires & Aspirations)

Wealth Structuring & Family Office Services

This branch of Eton provides ample support and services for individuals who want to proactively manage their family's wealth. These services are split between three categories:

Estate Transfer & Tax Planning

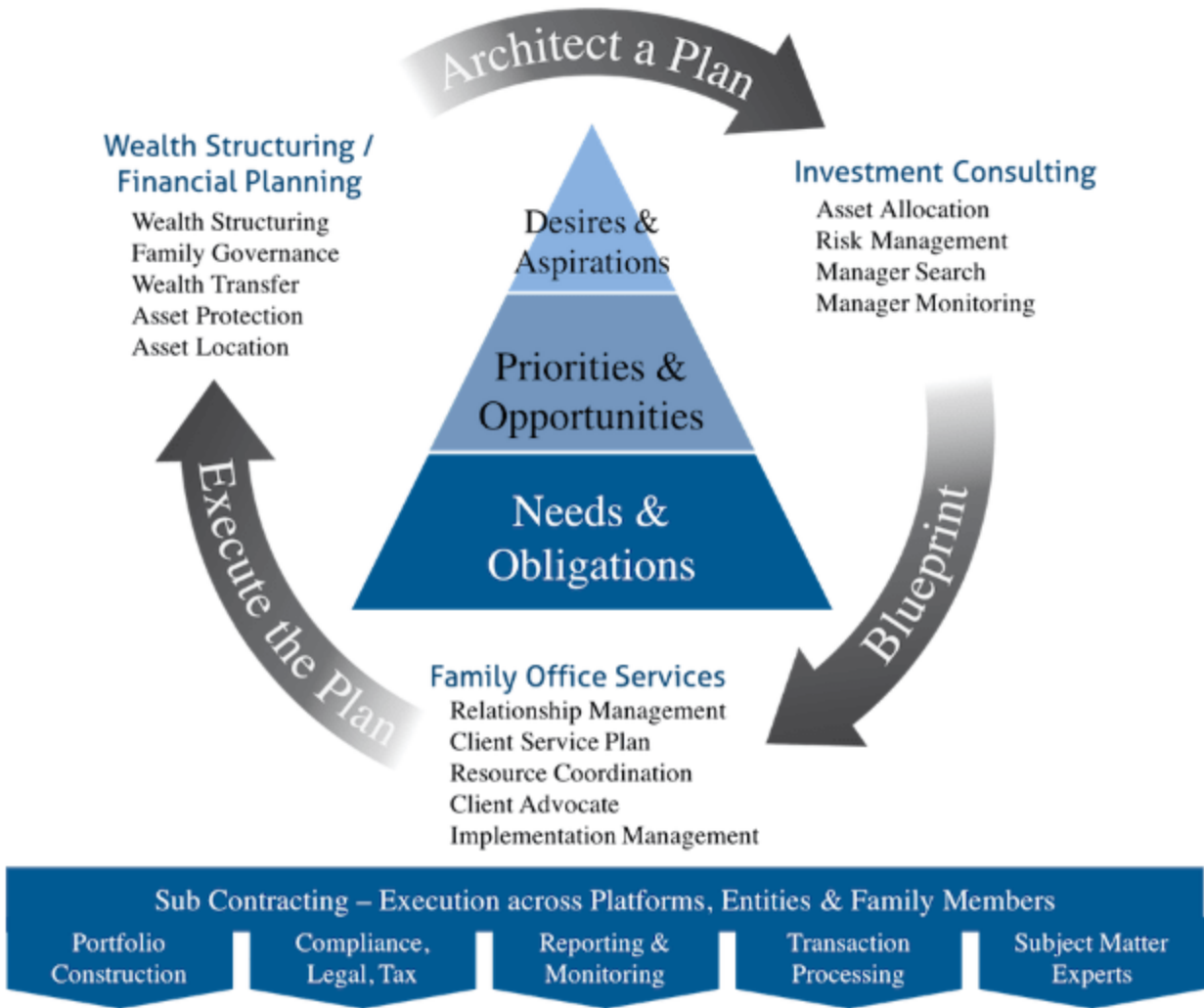
- Integration of investment and tax planning
- Wealth transfer strategies
- Gifting and philanthropic strategies
- Integration across different households and different generations

Reporting and Administrative Services

- Compliance with regulations
- Cash flow and budget management
- Trust and partnership administration
- Oversight of fiduciaries, consolidated reports, statements, and record keeping
- Accounts payable
- Foundation management

Private Wealth Education and Special Projects

- Family meeting, retreat planning, and administration
- Planning for post-sale liquidity
- Leadership succession planning
- Vendor network library, management, and referrals
- Private foundation overview and recommendations



Eton Advisors - Chapel Hill, NC

Rating Summary

The North Carolina financial advisors at Eton Advisors are committed to providing clients with a holistic, integrated, and client-centric approach to wealth management.

Additionally, the large team of CPAs and CFAs at Eton Advisors ensures that clients can benefit from a wide range of financial expertise, enhancing the overall investment management experience.

However, our firm could not find a statement of a fiduciary commitment, which is a crucial element of any financial planning relationship. Combined with an unverifiable fee structure, Eton Advisors ultimately earns a 3-star rating among the top financial planners in North Carolina.

By adopting a fiduciary commitment and clearly stating their fee structure, Eton Advisors could easily improve both their value proposition to new clients and their rating as a top financial advisor in Chapel Hill, NC.

Don't Miss: Top Financial Advisors in Tampa, St. Petersburg, and Palm Harbor, Florida

Maestro Wealth Advisors Review

[Maestro Wealth Advisors](#) is an independent, full-service financial advisor in Winston-Salem, NC, dedicated to helping their clients achieve the most out of their retirement planning.

We could not verify whether Maestro uses a fee-based or fee-only compensation structure. As always, we recommend verifying fee structure before partnering with any financial advisor in Winston-Salem, NC.

Key Factors that Enabled Maestro Wealth Advisors to Rank as a Top Financial Advisor in Winston-Salem, NC

Wide Range of Financial Services

Financial goals are subject to change and fluctuate over time, and for many, finding a North Carolina financial advisor that can adapt their services accordingly is a key part of long-term financial stability.

The financial advisors at Maestro can provide a range of financial services to support a variety of financial needs, including:

- **Financial Goal Planning**—Preparing for milestones like retirement, purchasing a home, education, and more
- **Investment Asset Management**—Utilizes proven mathematical formulas and nearly three decades of experience to create individualized asset management strategies
- **College Funding**—Balances retirement goals with education goals
- **Income Planning & Analysis**—Highly focused tool that aligns savings and investments to provide steady future income

- **Retirement Planning**—Comprehensive process to identify goals and estimate future expenses to set clients up for success in retirement
- **Tax Planning**—Structures assets to minimize tax implications in the future
- **Social Security Analysis**—Answers questions about Social Security, like when to file, spousal benefits, and more
- **Estate & Legacy Planning**—Creates a plan to effectively transfer assets with the least financial and emotional impact possible

WealthGuard™

To keep clients updated on their financial progress, Maestro Wealth Advisors provides access to WealthGuard™, a simple yet powerful account monitoring system.

With WealthGuard™, clients can track all of their accounts from one dashboard, monitoring components like asset allocation and overall performance.

Should any changes occur, clients will be notified by either email or text message, making it easy to stay up-to-date on their portfolio performance on a daily basis.



Maestro Wealth Advisors

Rating Summary

As a Registered Independent Advisor with a fiduciary commitment, the North Carolina financial advisors at Maestro do not have products to sell or quotas to meet, instilling trust that all advice will be unbiased.

Additionally, the firm places a strong emphasis on promoting educational resources, community events, and even radio talk shows dedicated to financial literacy.

With a wide range of services and a focus on empowering clients towards financial success, Maestro Wealth Advisors is one of the top financial advisors in Winston-Salem, NC to consider partnering with this year.

Morton Wealth Management Review

As one of the best options for wealth management in Greensboro, [Morton Wealth Management](#) is an independent, [fee-based](#) consulting firm that provides comprehensive financial planning, investment management, and wealth management services to high-net-worth families and individuals.

We have chosen Morton Wealth Management as a top Greensboro financial planner for their independence, range of services, and client-centric commitment.

Key Factors that Enabled Morton Wealth Management to Rank as a Top Financial Advisor in Greensboro, NC

Proactive Retirement®

[Proactive Retirement®](#) represents Morton Wealth Management's belief that retirement planning starts with each client's objectives, goals, and intentions. As such, the job of each Greensboro financial planner is to help clients clarify and define those goals.

This focus on providing clients with a proactive, goal-oriented strategy makes Morton an attractive option for clients that want a Greensboro financial advisor to help them devise an effective retirement strategy.

Clear direction and expert knowledge and skills from their Greensboro financial advisors is what propels people into smooth retirements.

Comprehensive Financial Planning

Whether you are looking to save for a child's education or diversify your portfolio, the foundation for good financial health lies in effective financial planning.

As such, the Greensboro financial advisors at Morton Wealth Management can help clients with a variety of financial planning challenges, including:

- Cash Management
- Portfolio Management
- Compensation and Option Planning
- Tax-Efficient Investing
- Proactive Tax Planning Strategies
- Charitable Giving Strategies
- Risk Management
- Education Funding
- Retirement Planning
- Insurance
- Medicare/Long-Term Care Consultations
- Social Security Optimization Analysis
- Wealth Transfer Strategies and Estate Planning

Rating Summary

Offering expert services and a commitment to adhering to high standards of conduct, Morton Wealth Management is a top choice for wealth management in Greensboro.

The firm prioritizes dedication, experience, and trust, and boasts a well-credentialed and experienced team, providing clients with a strong foundation of collective experience.

With a fiduciary commitment and a wide range of services, Morton Wealth Management is one of the best financial advisors in Greensboro, NC to consider partnering with this year.

Related: Best Financial Advisors in Pittsburgh, Pennsylvania

Old Peak Finance Review

[Old Peak Finance](#) offers comprehensive financial planning and wealth management as a fee-only financial advisor in Chapel Hill, NC.

Key Factors that Enabled Old Peak Finance to Rank as One of the Best Financial Advisors in Chapel Hill, NC

Clear Investing Philosophy

When you're entrusting your money with someone, you want to know where they are coming from. It helps when a company clearly outlines their investing philosophy. Old Peak Finance's investment method is grounded in academic research with an emphasis on personalization.

- Create individualized portfolio's based on a given client's risk tolerance
- Invest in a wide range and mix of investments
- Rebalance periodically
- Target higher return with Nobel Prize–winning investment research
- Avoid engaging in activities like market timing
- Establish and maintain a long-term focus

This process is appealing to anyone who is looking for a North Carolina financial advisory firm that will prioritize long term stability and wealth generation as opposed to ineffective short-term gains.

Comprehensive Financial Planning & Wealth Management

Effective financial planning considers all aspects of a client's life. Old Peak Finance provides comprehensive wealth management services for clients in Chapel Hill, including:

- **Financial Goal Planning**—Creating a financial plan for retirement, education funding, and other financial goals
- **Investments**—Analysis of current investments and strategizing for the future
- **Analysis of Insurance Needs**—Identifying whether you have too little (or too much) insurance coverage
- **Estate Planning**—Analyzing current estate plan for risk areas
- **Tax Minimization**—Identifying opportunities to minimize tax expenses
- **Liability Management**—Helping to decide whether to borrow, pay off, or refinance loans

Rating Summary

As a fee-only firm with a fiduciary commitment, Old Peak Finance provides clients with a strong foundation of trust and transparency, two key elements in any successful financial planning relationship.

With the addition of a clear investment philosophy and a comprehensive approach to wealth management and financial planning, Old Peak Finance is one of the best Chapel Hill financial advisors to consider partnering with this year.

Salem Investment Counselors Review

Founded in 1979, [Salem Investment Counselors](#) is a long-standing financial advisor in Winston-Salem, NC.

The firm provides portfolio management services to individuals, corporations, retirement and profit sharing plans, charitable institutions, foundations, and trusts.

We could not confirm whether the firm uses a fee-based or fee-only compensation structure, though Salem Investment Counselors [does state](#) that they “do not sell mutual funds or other investment products that generate fees or commissions,” and that “fees are based solely on a percentage of the client’s assets under management.”

As always, we recommend verifying fee structure before partnering with any financial advisor in Winston-Salem, NC.

Key Factors that Enabled Salem Investment Counselors to Rank as One of the Best Financial Advisors in Winston-Salem, NC

Diverse, Talented Team

Clients of Salem Investment Counselors can benefit from a large team of diverse backgrounds and skillsets, including banking, law, accounting, taxation, investment analysis, real estate, and venture capital.

Along with five CFA professionals, the team of North Carolina financial planners at Salem Investment Counselors holds the following designations:

- MBA—Master of Business Administration
- CTFA—Certified Trust and Financial Advisor
- CPA—Certified Public Accountant
- PFS—Personal Financial Specialist
- D.—Juris Doctor

With a wide range of professional backgrounds and many advisors holding multiple certifications, clients can trust that their financial health is in expert hands with Salem Investment Counselors.

Clear Investment Philosophy

With a unique expertise in selecting investments throughout the real estate, energy, and venture capital industries, the North Carolina financial advisors at Salem Investment Counselors focus on building a portfolio foundation with common stocks that are:

- Established companies with above-average growth prospects
- Small and medium-sized companies that are selling at prices that do not reflect their long-term potential
- Companies in industries that are undergoing consolidation

For fixed-income investing, the firm maintains an approach that minimizes risk, only considering high-quality issues that fall within the short-term to immediate-term maturity range.

Rating Summary

For clients that are looking for a well-established firm with a strong team of investment professionals, Salem Investment Counselors is a great fit.

With a fiduciary commitment, a wide pool of industry experience, a highly credentialed staff, and additional financial planning and management services, Salem Investment Counselors is one of the best financial advisors in Winston-Salem, NC to consider partnering with this year.

Popular Article: Top Financial Advisors in Miami and Coral Gables, Florida

Stearns Financial Group (SFG) Review

[Stearns Financial Group](#) (SFG) is a [fee-only](#) financial advisor in Greensboro and Chapel Hill. Their North Carolina financial advisors implement a proactive approach on behalf of their clients to help them navigate the turbulent investment markets of today.

Key Factors that Enabled Stearns Financial Group to Rank as One of the Best Greensboro & Chapel Hill Financial Advisors

Focus on Women

Women often have unique financial needs due to elements like longer lifespans, prolonged careers, and taking time away from the workforce to build a family.

As a top Chapel Hill and Greensboro financial planner, SFG maintains a special focus on empowering women financially and building their financial literacy to effectively navigate through:

- Divorce and New Beginnings
- Financial Literacy as Awareness
- Loss of Spouse
- Philanthropy
- What-If Scenario Planning
- Sudden Money Events
- Transition Planning

Specialty Financial Planning

Financial planning helps you make sure you have money prepared for the expected like retirement, travelling, and funding your children's educations.

But sometimes, you need expert advice when things take a sharp turn in an unexpected direction. A financial advisor in North Carolina can help look at your finances with a discerning eye and determine what can be adjusted to get you back on your feet.

This Greensboro and Chapel Hill financial advisor offers the following areas of specialty:

- Business Owners
- Intelligent Aging
- Life Transitions
- Retirement Readiness
- Sudden Money
- Women

The North Carolina financial advisors at SFG can also help you answer questions like:

- Are my investments set up right?
- Will I outlive my money?
- Do I need long-term insurance?
- Will my estate plan actually work?
- Is aging in a retirement community better for me?

These questions can easily become a source of stress and anxiety, but discussing them with one of the North Carolina financial planners at SFG can help you create an efficient, stress-free financial plan.



Stearns Financial Group

Rating Summary

As a fee-only Greensboro and Chapel Hill financial advisor, Stearns Financial Group provides clients with a solid foundation of trust and transparency, two key elements of any successful wealth management relationship.

Their focus on providing expert guidance through life events and unique client segments sets the firm apart from competing North Carolina financial advisors, particularly when it comes to financial strategies for women.

With a highly qualified team, a wide range of financial services, and a strong foundation of transparency, SFG is one of the best financial advisors in Chapel Hill, NC and Greensboro, NC.

Triad Financial Advisors Review

As one of the top financial advisors in Greensboro, NC, [Triad Financial Advisors](#) has been offering its services for more than 30 years.

The team of Greensboro financial advisors at Triad includes experienced and trusted professionals who have helped a variety of people with their financial issues under the philosophy of long-term planning.

Key Factors that Enabled Triad Financial Advisors to Rank as a Top Financial Advisor in Greensboro, NC

Fee-Only Firm

Triad Financial Advisors is an independent, fee-only firm offering wealth management in North Carolina. This is a particularly appealing feature for prospective clients worried about advisors who may not have their best interests in mind.

Often, but not always, conflicts of interest are caused by a portion of the financial advisor's compensation deriving from sales or the sale of a particular product. Fee-only financial advisors charge a fixed fee for their services. Their success and future business is based on their client's success.

Triad Financial Advisors' fee-only model can bring peace of mind to customers who want to know that their advisor is managing their money with the client's future in mind—not their personal bottom line.

Wide Range of Services

To meet the ever-changing needs of their clients, Triad boasts an array of personalized, goal-based services to help clients:

- **Build Your Plan**—Merges life goals with financial health by answering questions about education funding, retirement goals, short-term and long-term budgeting, and more
- **Monitor Your Plan**—Each client gets a dedicated team with at least one CFP® professional to ensure that their financial plan is consistently on track
- **Life's Surprises**—Helps clients deal with changes like the loss of a job, the death of a spouse, divorce, injury, inheritance, and more

- **Cash Management & Investments**—Investment philosophy is built on quantifiable, objective approach risk management

Rating Summary

As a fee-only firm with a fiduciary commitment, Triad Financial Advisors provides clients with the peace of mind that their financial health will always be handled with transparency, instilling trust within the client-advisor relationship.

Triad Financial Advisors also takes a personalized approach to financial health, ensuring that clients receive a uniquely tailored plan and facilitating a sense of teamwork throughout the wealth management process.

With a fee-only structure and a strong foundation of client-centric values, Triad Financial Advisors is one of the best financial advisors in Greensboro, NC to partner with this year.

Read More: Top Financial Advisers (IFAs) in Manchester and Cheshire, United Kingdom

Woodward Financial Advisors Review

[Woodward Financial Advisors](#) is a fee-only, independent financial advisory firm located in Chapel Hill, North Carolina.

As a top Chapel Hill financial advisor, Woodward places a strong emphasis on personal service, teamwork, independence, and maintaining continuing education through industry certifications and credentials.

Key Factors that Enabled Woodward Financial Advisors to Rank as a Top Financial Advisor in Chapel Hill, NC

Comprehensive View

Woodward believes that by taking a proactive role, clients can better control their financial futures. Comprehensive planning is an essential aspect to this proactive approach and is a key facet of this North Carolina financial advisor's services.

During the planning process, this team of Chapel Hill financial advisors assess all aspects of a client's financial situation, including income, expenses, debt, insurance, taxes, retirement savings, estate planning, and investments.

By taking the time to understand each individual client, this wealth management firm is able to create specific, coordinated approaches to helping clients craft their plans.

This comprehensive approach also puts the firm in the best position to provide spot-on recommendations for issues such as tax planning and cash flow.

Clear Wealth Management Process

Woodward Financial Advisors wealth management process begins with the formation of an investment policy statement. This document is the map by which the firm will help clients reach a variety of financial objectives. It contains the following elements:

- Clear articulation of goals and dreams
- Investment time horizon
- Diversification among asset classes and securities
- Cash flow needs
- Asset allocation targets
- Tax issues and efficiency in investing
- Estate planning
- Risk tolerance assessment



Woodward Financial Advisors - Chapel Hill, NC

Rating Summary

As a top Chapel Hill financial advisor, Woodward Financial Advisors works as a team to help clients achieve their goals and dreams, resolve questions and concerns, and clarify priorities.

This comprehensive view, the professional credentials of the firm's team, and its fee-only status make Woodward Financial Advisors an attractive choice when it comes to financial advisors in Greensboro, NC and the surrounding areas.

Conclusion—Best Financial Advisors in Greensboro, Chapel Hill, and Winston-Salem, North Carolina

Now that you have read this list of the top financial advisors in Greensboro, Chapel Hill, and Winston-Salem, North Carolina, you should be better prepared to answer these questions:

- Where can I find the best financial planning, wealth management, and asset management services in North Carolina?
- Where should I go if I am looking for additional services like estate planning, tax management, and risk management?
- What types of fees do financial planners in North Carolina charge, and which financial advisor is best for me?

Of course, the answers will depend on your individual goals, needs, and desires. As you've seen from this review, top firms have processes in place that can address the unique financial circumstances of different individuals.

The next step to take is to choose three to five firms from the list that seem to best suit your needs and set up appointments to meet the advisors.

Afterward, you will have all the information you need to make an informed decision and move one step closer toward achieving your financial dreams.

Rate Table Disclaimer

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

Image sources:

- <https://pixabay.com/en/consulting-for-real-estate-3031678/>
- <http://delegateadvisors.com/what-we-do/>
- <http://www.dmjwa.com/p/womans-wealth-management>

- <https://etonadvisors.com/about-eton/the-eton-experience>
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- <https://stearnsfinancial.com/home/process/>
- <http://www.woodwardadvisors.com/index.htm>