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# Top 10 Best Financial Advisors in Orlando, FL | 2018 Ranking

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## RANKING AND REVIEWS BEST FINANCIAL ADVISORS IN ORLANDO, FLORIDA

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### 2018 Ranking: Finding the Top Financial Advisors in Orlando, Altamonte Springs, & Winter Park

Orlando is known for many things, including a tourist hotspot and a favorite destination for retirees. It's also located in one of the states that was [hardest hit by foreclosures](#) following the 2008 subprime mortgage crisis.

One of the things you may notice about these examples is that they are all related to money. Families save diligently to take their children on a trip to Disney World and workers wonder if they've saved up to enjoy retirement.

Don't even get us started on the amount of thought and anxiety that goes into investing or buying a home - two factors that played huge roles during the Great Recession.

If you live in the Orlando area, hiring a financial advisor may be one of the wisest decisions you make. Taking the time to assess your current financial situation and plan for the future is a worthy investment of your time and money.

Of course, there is a lot of hesitation when it comes to choosing an Orlando financial advisor. Where do I start? How can I learn more about their values as an Orlando wealth management firm in addition to their years of experience?

This is where AdvisoryHQ steps in.

Our reviews are designed to help narrow down your search for the best financial advisors and planners in Orlando. This article of the best wealth management firms and financial planners in Orlando will reduce the amount of options you have to look through before selecting your ideal firm.



*Award Emblem: Top 10 Best Financial Advisors in Orlando, Altamonte Springs, & Winter Park, FL*

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## **Top 10 Financial Advisors in Orlando, Altamonte Springs, & Winter Park | Brief Comparison & Ranking**

<b>Financial Advisors in Orlando</b>	<b>Highlighted Features</b>	<b>Ratings</b>
Allgen Financial Advisors	Outlined path to success	5
American Financial Advisors	Specialty focus on serving airline pilots	5
AndCo Consulting	Endowment and foundation services	5
Certified Financial Group, Inc.	Experienced, well-accredited team	5
Moisand Fitzgerald Tamayo LLC	Client-centric value proposition	5
Resource Consulting Group	Transparent, client-centric services & philosophies	5

Ronald Blue Trust	Faith-based approach to wealth management	5
WaterOak Advisors	Comprehensive financial services	5
FirsTrust	Comprehensive trust & estate planning	3
Nelson Financial Planning	Holistic financial & retirement planning	3

*Table: Top 10 Best Financial Advisors in Orlando, Altamonte Springs, & Winter Park | Above list is sorted by rating*

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## **Tips for Selecting the Best Financial Advisors in Orlando, FL**

When it comes to choosing the best financial advisors in Orlando and the surrounding area, 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 Orlando financial advisor 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 Orlando financial planners, each firm specializes in varying areas of financial planning and wealth management.

If your needs are of a broader nature and you prefer simple yet comprehensive financial planning, you may be well-suited with a financial planner in Orlando that offers a broader range of services.

Once you've narrowed down your choices to a select few Orlando financial advisors, see if any of your selected firms offer 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 Orlando, FL before committing to their services.



### *Best Financial Advisors in Orlando*

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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 Orlando, Florida**

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

- [Allgen Financial Advisors](#)
- [American Financial Advisors](#)
- [AndCo Consulting](#)
- [Certified Financial Group, Inc.](#)
- [FirsTrust](#)
- [Moisand Fitzgerald Tamayo, LLC](#)
- [Nelson Financial Planning](#)
- [Resource Consulting Group](#)
- [Ronald Blue Trust](#)
- [WaterOak Advisors](#)

Click below for previous years' rankings:

- **2016 Review:** [Top 9 Best Financial Advisors in Orlando](#)
- **2017 Review:** [Top 8 Best Wealth Management Firms in Orlando](#)

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## Allgen Financial Advisors Review

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Headquartered in Orlando, [Allgen Financial Advisors](#) provides highly customized financial planning and wealth management services to clients throughout the United States and abroad.

As a [fee-based](#) Orlando financial advisor, we have included them on this list for their independence, fiduciary commitment, and wide range of financial services.

### **Key Factors That Enabled Allgen Financial Advisors to Rank as a Top Orlando Wealth Management Firm**

#### **The Path**

Allgen Financial wants to help you design a path to success. No matter where you currently are, this Orlando financial advisory firm has a roadmap to get you to the next step through the three fundamental life stages:

#### Foundation

If you find that you have no financial plan, no emergency fund, and a whole lot of debt, you may want to start here. Your Orlando financial advisor will help you:

- Determine your net worth

- Create a spending plan
- Develop risk management strategies
- Develop a plan to eliminate debt

### Formation

Do you have your current finances under control but need to start looking into investments, retirement, or education planning for your children? This step allows you to maximize on what you already have, as your Orlando financial planner will help you:

- Plan for retirement
- Maximize investments
- Develop a strategy for education costs
- Create a plan for paying your mortgage

### Freedom

Do you feel that you are already financially free? Allgen Financial can show you how to maximize your investments and minimize your tax liabilities to truly eliminate financial worries. Your financial advisor in Orlando will guide you with:

- Protecting assets from ongoing expenses
- Creating an estate plan
- Collaborating with other professionals for long-term success
- Utilizing resources for charitable goals

### **Investment Management**

Wealth is rarely built overnight. Through thoughtful investing, however, wealth can accumulate and set you up for a secure future. Allgen Financial has a team of highly experienced financial advisors in Orlando who know how to invest on your behalf through:

- Current financial situation, goals, and timeline
- Wide range of investment options
- Screening for securities that have the highest return and the lowest risk
- Prioritizing risk management to match your personal preferences



*Allgen Financial Advisors - Orlando, FL*

### **Rating Summary**

As an independent Orlando financial advisor with a fiduciary commitment, Allgen Financial Advisors provides the peace of mind to know that clients come first and foremost throughout every step of the financial planning process.

With a wide range of services, a highly experienced team, and a personalized approach, Allgen is one of the best financial advisors in Orlando to consider partnering with this year.

***See Also:*** [\*Top Financial Advisors in Wisconsin \(Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon\)\*](#)

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## **American Financial Advisors Review**

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Founded in 1989, [American Financial Advisors](#) is a registered investment advisor offering investment and financial planning, trusts and estates, business advisory, and even lending services.

American Financial does not specify whether they provide fee-only or fee-based services. As always, we recommend verifying fee structure before partnering with any financial advisor in Orlando.

## **Key Factors That Enabled American Financial Advisors to Rank as a Top Financial Planner in Orlando**

### **Value-Driven Fiduciary**

As one of the top Orlando financial advisors, American Financial adheres to the fiduciary standard of service, which encompasses the highest standards of care, trust, confidence, and candor within the client-advisor relationship.

Along with a fiduciary commitment, the team of Orlando financial planners at American Financial strives to embody the following values in everything they do:

- **Integrity**—Mutual trust and principled actions create a strong foundation for positive, long-term relationships
- **Accountability**—All actions taken must be justifiable and explainable
- **Service**—These Orlando financial advisors are active participants in their clients' success, striving to meet their needs through every step
- **Performance**—American Financial will always be on top of their game when it comes to driving results
- **Innovation**—Financial planning should be customized to fit each client, as no two clients will have the same needs and goals

### **Focus on Pilots**

To address the unique needs faced by airline pilots, American Financial provides a range of specialty services that are catered to fit this client segment.

Investment management and financial planning services for pilots includes, but is not limited to:

- “Equity Distribution to IRA Rollover” analysis
- Pre-retirement planning
- Regular investment updates focused on pilot-specific topics
- Establishing asset allocation and rebalancing as needed
- Assistance with retirement process and forms
- Survivorship planning
- Estate, legacy, and insurance planning





### *Best Orlando Financial Advisors*

#### **Rating Summary**

As a top financial advisor in Orlando, American Financial maintains a strong emphasis on the importance of a value-driven, client-centric approach.

With a fiduciary commitment, a comprehensive range of financial services, and a unique specialty in helping airline pilots, American Financial is a top Orlando financial planner to consider partnering with this year.

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## **AndCo Consulting Review**

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[AndCo Consulting](#) is an independent Orlando wealth management firm that strives to be the first point of contact for any financial challenge that their clients may face.

While AndCo does not explicitly state whether they are a fee-only or fee-based firm, their [ADV](#) states that “100% of our fee is generated from the hard-dollar annual retainer fee the client pays directly to us for our services.”

As always, we advise readers to verify compensation structure before starting a working relationship with any financial advisor in Orlando, FL.

#### **Key Factors That Enabled AndCo Consulting to Rank as a Top Orlando Wealth Management Firm**

## **Experienced Team**

Partnering with AndCo provides clients with access to a large, dynamic team, collectively bringing decades of wealth management experience to the table.

In fact, 40 percent of their investment consultants average over 25 years of experience within the industry. Collectively, the team of Orlando financial advisors at AndCo includes:

- 20 CFA charterholders (Chartered Financial Analyst)
- 6 CAIA charterholders (Chartered Alternative Investment Analyst)
- 3 CIPM charterholders (Certified Investment Performance Measurement)
- 3 CFP® professionals (Certified Financial Planner)
- 2 CIMA professionals (Certified Investment Management Analyst)

Additionally, 29 team members hold advanced degrees, demonstrating a strong commitment to ongoing education and high standards of industry knowledge at this Orlando financial advisory firm.

## **Endowment and Foundation Services**

As a top Orlando wealth management firm, AndCo does not restrict its services to private individuals. They also help endowments meet their budgetary requirements and ensure longevity through customized investment portfolios.

This financial advisor in Orlando counts colleges, universities, hospitals, and more among its institutional clients. Specific endowment and foundation services include:

- Investment policy development and review
- Spending policy development and review
- Strategic asset allocation and portfolio structure
- Investment manager/strategy identification, evaluation, and recommendation
- Customized monthly, quarterly, and special request investment reports
- Quarterly economic summary
- Board/investment committee education
- Ongoing investment manager due diligence
- Professional service provider evaluation
- Special project coordination and execution

## **Rating Summary**

As a fiercely independent financial advisor in Orlando, AndCo maintains a strong commitment to providing financial advice that is truly objective and conflict-free, a key element of any successful financial planning relationship.

With an experienced advisory team and a wide range of investment management capabilities, AndCo is one of the best financial advisors in Orlando, FL to consider partnering with this year.

***Don't Miss: [Top Financial Advisors in Kansas City, Leawood, and North Kansas City](#)***

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## **Certified Financial Group, Inc. Review**

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Located outside of Orlando in Altamonte Springs, [Certified Financial Group, Inc.](#) is a wealth management firm that offers financial planning and investment management services to a variety of families, individuals, athletes, and other affluent clients.

Certified Financial Group is a [fee-only](#) wealth management firm in the Orlando area.

### **Key Factors That Enabled Certified Financial Group, Inc. to Rank as One of the Top Florida Financial Advisors**

#### **Comprehensive Financial Services**

As one of the best Florida financial advisors in the Orlando area, Certified Financial Group provides clients with a comprehensive range of services, which include:

- **Retirement Planning**—Clients work with a CFP® professional to help individuals or couples assess their retirement readiness
- **Financial Planning**—All financial plans begin with a no-obligation consultation and are maintained through ongoing support and financial guidance
- **Investment Planning**—Portfolios are designed with unique financial needs and preferences in mind
- **Social Security Planning**—Strategies are put in place to ensure that clients can maximize their Social Security benefits
- **Estate Planning**—Legal assistance for estate planning is offered by [Murphy & Berglund, PLLC](#), an in-office law firm

#### **Experienced Team**

Uniquely, every member of the team at Certified Financial Group carries the Certified Financial Planner™ designation.

With over 300 years of combined experience, many team members also carry additional financial certifications and designations, which include:

- AIF®—Accredited Investment Fiduciary
- CPA—Certified Public Accountant
- NSSA®—National Social Security Advisor

For clients, the vast array of certifications from these Florida financial advisors guarantees that they are partnering with an advisor that is committed to ongoing industry education and strict fiduciary requirements, adding to the overall value of their advice.



*Certified Financial Group*

## **Rating Summary**

As one of the best Florida financial advisors in the Orlando area, Certified Financial Group maintains a strong commitment to upholding fiduciary duties and transparency, instilling trust within the client-advisor relationship.

With a fee-only structure, comprehensive financial services, and a well-accredited team with centuries of industry experience, Certified Financial Group is one of the best Florida financial advisors to consider partnering with this year.

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## **FirsTrust Review**

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Established in 1994, [FirsTrust](#) is a [fee-only](#) wealth management firm in Orlando with additional Florida offices in Daytona Beach, Tampa, and Boca Raton.

The Orlando financial advisors at FirsTrust offer financial planning services, investment management, tax management, trust and estate planning, and more.

## **Key Factors That Enabled FirsTrust to Rank as a Top Financial Advisor in Orlando, FL**

### **Retirement Planning**

Retirement planning is a key part of every solid financial plan. As such, this wealth management firm in Florida impresses upon its clients that successful retirement planning is about more than simply waiting for savings to grow.

According to FirsTrust, effective retirement planning requires an understanding of specific variables, like your income needs in retirement and taxes to live comfortably.

This Orlando financial advisory firm can help clients with the following specifics of successful retirement planning:

- Creating a tax-efficient retirement strategy
- Setting a monthly budget to manage spending
- Using the web to monitor accounts and track progress
- Understand the potential impact you may have on yourself, your family, and your legacy

### **Estate Planning**

In the same way that effective retirement planning is about more than just siphoning off some money into a savings account, estate planning is about more than just writing a will and locking it away.

This Orlando wealth management firm can help you do the following and more:

- Avoid financial conflicts within the family
- Protect heirs from spendthrift concerns
- Mitigate federal estate taxes
- Provide financial management in the event of disability
- Retain and protect family heirlooms
- Avoid postmortem legal proceedings
- Protect and/or dispose of business interests
- Ensure spouses are financially secure
- Guarantee future college educations

### **Rating Summary**

As a fee-only financial advisor in Orlando, FirsTrust provides dynamic value to their clients through their fiduciary commitment, ensuring that all advice is truly unbiased.

FirsTrust also provides significantly comprehensive financial services, detailing each segment of wealth management and financial planning.

While the firm certainly has a great deal of expertise, compared to competing Orlando financial advisors, their website is somewhat cluttered and difficult to read. This can make it challenging for potential clients to fully evaluate their services.

By updating their website to a more user-friendly format, FirsTrust could easily improve both their value proposition to new clients and their rating as a top financial advisor in Orlando, FL.

***[Related: Top Financial Advisors in Dallas, Texas \(Ranking of Dallas Wealth Advisors\)](#)***

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## Moisand Fitzgerald Tamayo, LLC Review

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[Moisand Fitzgerald Tamayo, LLC](#) provides steady financial guidance through both calm and tumultuous economic periods.

As a top [fee-only](#) Orlando wealth management firm, Moisand Fitzgerald Tamayo offers financial planning and wealth management services to a variety of clients, from retirees and pre-retirees to trusts and those who have found themselves with sudden wealth.

### **Key Factors That Enabled Moisand Fitzgerald Tamayo, LLC to Rank as a Top Financial Advisor in Orlando, FL**

#### **Client-Centric Value Proposition**

For many clients, part of finding the best financial advisor in Orlando means evaluating the approach to how their personal financial life will be handled.

Moisand Fitzgerald Tamayo makes it easy to evaluate their services by listing the benefits that their previous clients have experienced. By working with this Orlando wealth management firm, clients are:

- **Protected**—A fiduciary commitment ensures that these Florida financial advisors are always working in their client's best interest.
- **Educated**—The firm works hard to help clients understand their financial plan and how it relates to their success.

- **Up-to-Date**—The team of Orlando financial advisors is continuously learning about industry trends, changes, and ideas.
- **Efficient**—Moisand Fitzgerald Tamayo prides itself on possessing the skills, knowledge, and determination to tackle a variety of client needs.
- **Organized**—Your financial advisor in Orlando, FL will help you keep your financial affairs in order.
- **Confident**—Sound planning and preparation is key to making good financial decisions through an ever-changing future.

### **Straightforward Service Offerings**

In keeping with the firm's mission to cut through the noise of complicated financial topics, Moisand Fitzgerald Tamayo keeps their service offerings as straightforward as possible.

Not only does this exemplify the firm's mission, but it also makes wealth management much more approachable, as all services are free from confusing or irrelevant financial jargon.

These service offerings include:

- **Specific Tax Planning**—The firm has three IRS Enrolled Agents to assist clients with taxes.
- **Real Financial Planning**—Holistic planning that considers all aspects of a client's life.
- **Objective Implementation**—Proactively seeking and suggesting the best investment strategies and choices.
- **Ongoing and Proactive Monitoring**—Full transparency, open communication, and constant monitoring of client accounts.



*Moisand Fitzgerald Tamayo - Orlando, FL*

## **Rating Summary**

As a top financial advisor in Orlando, Moisand Fitzgerald Tamayo stands out for their dedication to providing wealth management and financial planning services that are equal parts efficient and straightforward.

The firm also demonstrates a strong commitment to putting clients first through their fee-only structure, approachability, and client-centric approach, earning a 5-star rating overall.

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## **Nelson Financial Planning Review**

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[Nelson Financial Planning](#) is a wealth management firm in Winter Park, Florida that specializes in holistic retirement planning.

Nelson Financial Planning does not specify whether it is a fee-only or a fee-based Florida financial advisor. As always, we advise readers to verify a financial advisor's compensation structure before starting a working relationship.

### **Key Factors That Enabled Nelson Financial Planning to Rank as One of the Top Financial Advisors in Winter Park, FL**

#### **Holistic Financial and Retirement Planning**

Nelson Financial Planning offers a comprehensive, client-centric approach to financial planning. It's all about the client's goals and dreams, and this Orlando area wealth management firm understands that.



Their goal is to make sure that every client has the information and guidance they need to feel comfortable making decisions about their wealth management.

This Florida financial advisory firm provides financial advice in the following areas:

- **Retirement Income:** Putting clients in a position where they can live comfortably in retirement
- **Retirement Planning:** Helping clients make the best planning and investing decisions today so that they can be secure tomorrow
- **Investments:** Assistance with selecting good investments that are aligned with a client's goals and objectives
- **Taxes:** Expert guidance through the complex tax system and advice minimizing one's tax burden
- **Florida Retirement System:** Discuss the benefits of enrolling in this system, how it affects your retirement options, and how to painlessly enroll if one chooses to

### **“Dollars and Sense” Radio Show**

As one of the top financial advisors in Winter Park, FL, Nelson Financial Planning produces a radio show on a number of financial topics.

Called Dollars and Sense, it is the longest running radio show in Central Florida with more than 1,400 episodes.

Listeners can call in with their financial questions, while the Orlando financial advisors at Nelson Financial Planning cover topics like retirement income, investments, retirement planning, taxes, Social Security, mortgages, saving for college, and more.

### **Rating Summary**

As a top Florida financial advisor in the Orlando area, Nelson Financial Planning provides clients with a range of comprehensive and valuable retirement services, particularly when it comes to navigating through the Florida retirement system.

However, for some, evaluating the full scope of Nelson Financial Planning's expertise may be challenging for two reasons. First, there is no way of knowing whether the firm uses a fee-based or fee-only compensation structure.

Second, while the firm's website does provide a lot of information, the site layout is somewhat cluttered and difficult to read, particularly when compared to competing Florida financial advisors.

By clarifying their fee structure and updating their website to a more user-friendly format, Nelson Financial Planning could easily improve both their value proposition to clients and their rating as one of the best financial advisors in Winter Park, FL.

**Popular Article:** [Best Financial Advisors in Omaha, Nebraska](#)

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## Resource Consulting Group Review

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[Resource Consulting Group](#) is an independent, [fee-only](#) Orlando financial advisor that merges risk management, philanthropic planning, taxes, estate planning, and investments to offer a fully integrated wealth management system to high-net-worth individuals and families.

### **Key Factors That Enabled Resource Consulting Group to Rank as a Top Financial Advisor in Orlando**

#### **The Seven Investment Fundamentals**

In order to encompass a range of services, Resource Consulting has taken the most relevant investment objectives and created [The Seven Investment Fundamentals](#) to help clients avoid the dangers of the market:

- **Have an appropriate allocation to equities:** Properly allocated assets are the single strongest determinant of yielding high returns over the long term. In simple terms, don't put all your eggs in one basket.
- **Stay fully invested:** Timing your investments properly is key. Market timing can add uncertainty and reduce efficiency, both of which should be avoided.
- **Keep costs down:** Resource Consulting believes that the annual portfolio cost should be no more than 1 percent.
- **Use only short-term bonds:** These bonds offer less risk. Exposure to risk from long-term bonds only offers a small return.
- **Include small cap stocks:** Over time, small cap stocks garner higher returns than large cap stocks.
- **Include value stocks:** Value stocks also produce higher returns and allow for significant growth.

- **Have broad diversification:** No single investment strategy works all of the time. Reduce risk through the use of asset diversification.

## Retirement Planning Services

Resource Consulting offers simple and transparent retirement planning for individuals and employees based on the following principles:

- **Simplicity:** Leave the complicated jargon at the door; retirement planning should be as simple and as accessible as possible.
- **Plan Wellness:** Increasing employee participation and encouraging employees to adequately fund their retirements ensure a steady income during retirement years.
- **Fiduciary Assistance:** Resource Consulting can serve as your plan's ERISA, and it is the first firm in Florida to hold the CEFEX certification for fiduciary excellence.
- **Investment Strategies:** Custom investment portfolios allow practical investing and the application of solid research.
- **Transparency of Fees:** As a fee-only firm, partnering with the Orlando financial advisors at Resource Consulting Group means having full transparency at all times.
- **Broad Resources:** The Resource Consulting team is highly accredited and includes CPAs, MBAs, CFPs, and two attorneys.



*Resource Consulting Group - Orlando, FL*

## Rating Summary

As a top financial advisor in Orlando, Resource Consulting Group follows through on making the process of financial planning and wealth management both streamlined and accessible.

Additionally, their financial philosophies, beliefs, and practices are clearly laid-out and well-defined, improving their transparency, allowing potential clients to quickly see the firm's value and solidifying Resource Consulting Group's 5-star rating.

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## Ronald Blue Trust Review

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With an office location in the Greater Orlando area of Maitland, [Ronald Blue Trust](#) is a fee-only financial advisor in Orlando, FL.

Uniquely, the firm takes a [faith-based approach](#) to financial planning, "believing that biblical principles are the best guide for making wise financial decisions."

### **Key Factors That Enabled Ronald Blue Trust to Rank as One of the Top Financial Advisors in Orlando, FL**

#### **Client Divisions**

To better serve their client base, Ronald Blue Trust maintains four distinct divisions, each tailored to cater towards the unique financial needs of the group. These divisions include:

- **Private Wealth**—Comprehensive services to clients with an approximate net worth of \$1 million
- **Family Office**—Focused on the complex needs of multi-generational families
- **Professional Athlete**—Expert strategies to build and maintain wealth during a short career span
- **Everyday Steward®**—Financial planning strategies for those just getting started

These divisions not only enable the Orlando financial planners at Ronald Blue Trust to reach a wide range of clients, but they also lend a competitive edge to the firm, providing services that many financial advisors in Orlando miss.

## **Faith-Based Approach**

Rather than focus on how much money can be made, the driving purpose behind Ronald Blue Trust is to instill their clients with an enriched life.

For these Orlando financial advisors, enrichment can be attained by infusing financial planning and investment management with biblical principles, ultimately leaving a legacy defined by “[financial, spiritual, and social capital](#).”

By providing a space where faith and finances can intersect, Ronald Blue Trust provides their clients with a unique—and wholesome—perspective on financial health, allowing clients to align their financial principles with the principles of their faith.

## **Rating Summary**

For clients that want their Orlando financial advisor to share their principles—and put them in practice through expert financial management—Ronald Blue Trust is a great fit.

Additionally, their separation of client divisions enhances both the firm’s reach and value, as they can serve a wider range of clients underneath the expertise of a dedicated, focused team.

With a unique, faith-based approach and the ability to serve clients of all asset sizes, Ronald Blue Trust is one of the top financial advisors in Orlando, FL to consider partnering with this year.

***Read More: [Top Financial Advisors in Montréal & Ottawa, Québec, Canada](#)***

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## **WaterOak Advisors Review**

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Located in Winter Park, [WaterOak Advisors](#) is a [fee-only](#) wealth management firm in the Orlando area that serves as an outsourced Chief Investment Officer for individuals, families, foundations, endowments, and institutions.

**Key Factors That Enabled WaterOak Advisors to Rank as One of the Top Financial Advisors in Winter Park, FL**

## **Comprehensive Financial Services**

Part of what makes WaterOak Advisors into one of the top financial advisors in Winter Park, FL is their commitment to ensuring that each client's money is simultaneously growing and being preserved.

Financial planning from this wealth management firm in Florida focuses on three essential areas: goals planning, tax planning, and estate planning.

Wealth management clients can benefit from strategies that financial advisors often overlook, like:

- **Economies of Scale**—Benefit from exclusive pricing based on WaterOak's buying power
- **Advanced Reporting**—Customized performance reporting and access to client portal
- **Tax Alpha**—Advanced tax management strategies
- **Retirement Planning**—Advanced spending and distribution strategies

## **Diverse Portfolio Construction**

Rather than rely on traditional portfolio construction, portfolios from WaterOak Advisors utilize global stocks, global bonds, and non-correlating alternatives to significantly enhance returns.

This approach allows individual investors to take advantage of portfolio strategies previously only available to institutional investors, leveling the playing field and adding dynamic investment value.

WaterOak Advisors uses two decades worth of innovation in portfolio management to produce a structured, evidence-based strategy, enhancing returns for their clients.

## **Rating Summary**

With a fee-only structure and an emphasis on client satisfaction, WaterOak Advisors is one of the top financial advisors in Winter Park, FL to consider partnering with this year.

Their commitment to maintaining low client-to-advisor ratios enables clients to benefit from both expert financial services and personalized service, solidifying their rating as one of the best financial advisors in Florida, including Orlando and Winter Park.

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## Conclusion – Top Financial Advisors in Orlando, Florida

Now that you've had the opportunity to review our list of the top financial advisors and wealth managers in and around Orlando, Florida, you should have a good idea of which advisors will fit your needs the best.

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

Even if an advisor does not offer a consultation, you may still be able to get a few specific questions answered by giving them a call. Most Orlando wealth management firms should be happy to answer your questions. If they're not, perhaps that's a good indicator that you may want to take your business elsewhere.

Knowing what you want while reviewing the top financial advisors in Orlando will make your decision process much smoother. This is an exciting yet nerve-wracking time, and we encourage you to exercise your confidence as you get one step closer to financial freedom.

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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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Image sources:

- <https://www.bigstockphoto.com/image-123125195/stock-photo-orlando%2C-florida%2C-usa-downtown-city-skyline-from-eola-park>
- <http://www.allgenfinancial.com/financial-advisors/>
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