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# **10 Best Financial Advisors & Wealth Management Firms in Wisconsin | 2018 Ranking**

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## **RANKING & REVIEWS BEST FINANCIAL ADVISORS IN WISCONSIN**

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### **2018 Ranking of the Top Financial Advisors in Milwaukee, Madison, Waukesha, & Cedarburg, WI**

Whether you have already entered retirement or are just starting to think about it, having a good Wisconsin financial advisor by your side can be the difference between comfort and discomfort.

The sheer number of Madison, Waukesha, Cedarburg, and Milwaukee financial advisors makes choosing one a difficult task.

By developing a clear idea of the types of services you need and conducting thorough research, the answers to the following questions will soon become clear:

- Where can I find the best financial planning, wealth management, and asset management services?
- 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 charge, and which Wisconsin financial advisor is best for me?

While the final decision rests in your hands, we have compiled a list of the top financial advisors in Wisconsin—including Milwaukee, Madison, and other areas—to give you a jumpstart on your way to financial success.



*Award Emblem: Best 10 Financial Advisors in Wisconsin*

## Top 10 Best Financial Advisors in Wisconsin | Brief Comparison & Ranking

Best Financial Advisors in Wisconsin	Highlighted Features	Ratings
Annex Wealth Management	Focus on financial literacy through radio shows & free workshops	5
Financial Planning & Information Services, Inc.	Diverse array of financial services	5
Financial Service Group Inc.	Client-centric process	5
Hogan Financial	Financial planning strategies based on life transitions	5
Investors Advisory Group	Faith-based approach to financial management	5

Landaas & Company	Diverse range of educational resources	5
PJS Investment Management	Clear wealth management philosophy	5
Savant Capital Management	Comprehensive, assessment-based approach	5
McCarthy Grittinger Financial Group LLC	Wide range of comprehensive financial services	3
NorthStar Asset Management, Inc.	Large, experienced team	3

*Table: Top 10 Best Financial Advisors in Wisconsin | Above list is sorted by rating*

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## **Tips for Selecting the Best Wisconsin Financial Advisors**

When it comes to choosing the best Wisconsin financial advisor, 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 Milwaukee, Madison, Green Bay, and across the state has to offer, and match those services up with your own personal financial goals.

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

As you will see in the following reviews for financial advisors in Wisconsin, 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 advisor in Wisconsin that offers a broader range of services.

Once you've narrowed down your choices to a select few of these top-ranking Wisconsin financial advisors, 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 firm for wealth management in Milwaukee, Madison, Waukesha, or other cities before committing to their services.



### *Best Wisconsin Financial Advisors*

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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 Wealth Management Firms in Wisconsin**

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

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

- [Annex Wealth Management](#)
- [Financial Planning & Information Services, Inc.](#)
- [Financial Service Group Inc.](#)

- [Hogan Financial](#)
- [Investors Advisory Group](#)
- [Landaas & Company](#)
- [McCarthy Grittinger Financial Group](#)
- [North Star Asset Management, Inc.](#)
- [PJS Investment Management](#)
- [Savant Capital Management](#)

Click below for previous years' rankings:

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

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## Annex Wealth Management Review

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Since its founding in 2000, [Annex Wealth Management](#) has been focused on listening to its clients and giving them independent guidance on how to manage their wealth.

Although Annex is a [fee-based](#) wealth management firm, they do [indicate](#) that they take no commissions on investment products and act as a fiduciary for their clients.

Their independent status also means that they do not manufacture investment products or sell proprietary mutual funds that would constitute a potential conflict of interest.

### **Key Factors That Enabled Annex Wealth Management to Rank as a Top Financial Advisor in Wisconsin**

#### **Large, Experienced Team**

With nearly 60 associates spread throughout four locations, the Annex Wealth Management team is substantially larger than that of competing Wisconsin financial advisory firms.

These Wisconsin financial planners also come from diverse backgrounds in providing this firm with professionals skilled in marketing, law, and client relations in addition to their financial expertise. Professional certifications and designations include:

- MBA
- CFP®
- CRPS®
- CDFA®
- CPA

- ChFC®
- CLU®
- CIMA®

With a large number of experienced professionals and one-on-one service, clients benefit from years of expertise and resources not found in smaller firms.

### **Wide Range of Capabilities**

Clients can find an extensive range of financial services offered by Annex Wealth Management, providing financial expertise for an array of challenges. These services include:

- **Financial & Retirement Planning**—Setting goals, portfolio development, ongoing management, and consistent monitoring
- **Estate & Legacy Planning**—Examining goals, preparing a plan for guardianship and beneficiaries, reviewing and updating over time, and more
- **ERISA Fiduciary Consulting**—Helps ensure that business owners provide cost-effective, valuable, and compliant retirement plans
- **Investment Management**—Uses actively managed mutual funds and an in-house Investment Policy Committee to create dynamic, effective portfolios
- **Tax Reduction Planning**—Includes distribution planning, Roth conversions, tax loss harvesting, and tax gain harvesting
- **Communication & Education**—Radio programs, free workshops, and workplace education to enhance financial literacy

### **Rating Summary**

As a fee-based Wisconsin financial advisor with a fiduciary commitment, Annex Wealth Management provides clients with a solid foundation of trust and transparency, two crucial elements of any successful financial relationship.

They also maintain a dedication to educating and connecting with their clients, further enhancing transparency and adding to their long list of capabilities.

With comprehensive financial services, a diverse team, and an independent structure, Annex Wealth Management is one of the best Wisconsin financial advisors to consider partnering with this year.

***See Also: Best Financial Advisors in Indianapolis, Indiana***

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# Financial Planning & Information Services, Inc. Review

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Located in De Pere, [Financial Planning & Information Services, Inc.](#) (FPIS) is a [fee-only](#) financial advisor in Wisconsin.

Since its inception in 1985, FPIS has maintained their core fiduciary commitment, avoiding commissions to provide unbiased, client-centric wealth management and financial planning.

## **Key Factors That Enabled Financial Planning & Information Services, Inc. to Rank as One of the Top Wisconsin Financial Advisors**

### **Diverse Array of Services**

For many clients, the best Wisconsin financial planners will provide a variety of services, ensuring financial expertise as plans and goals change over time.

As a top financial advisor in Wisconsin, FPIS provides the following financial planning and wealth management services:

- Retirement Analysis & Planning
- Tax Planning & Preparation
- Estate Planning & Insurance Concepts
- Education Planning
- Charitable Planning
- Investment Advice
- Asset Management
- Cash Flow & Saving

Each segment of service is fully customizable to match each client's needs while maintaining flexibility to adjust to changes over time, setting clients up for success over the duration of their financial planning relationship with FPIS.

### **Professional Affiliations & Designations**

A great way for potential clients to evaluate a financial advisor in Wisconsin is to look at the various affiliations and designations carried by the firm. FPIS maintains membership in a variety of well-respected organizations, including:

- FPA—Financial Planning Association
- NAPFA—National Association of Professional Financial Advisors
- NATP—National Association of Tax Professionals

- CFP®—Certified Financial Planner™

Each of these affiliations carries stringent requirements for membership, including ongoing education, a demonstrated fiduciary commitment, independent structure, and more.

### **Rating Summary**

As a fee-only Wisconsin financial advisor with a fiduciary commitment, FPIS represents the golden standard in financial advisement.

With these two elements, clients can trust that they are receiving unbiased, transparent advice that is truly made in their own best interest, supporting positive client-advisor relationships over the long-term.

Their focus on providing diverse financial services and continued affiliation with industry organizations adds to the firm's expertise, solidifying their ranking as one of the top financial advisors in Wisconsin.

***Don't Miss: Best Financial Advisors in Chicago, Illinois (Ranking)***

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## **Financial Service Group Inc. Review**

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Located outside in Mount Pleasant, [Financial Service Group Inc.](#) is a [fee-only](#) wealth management in Milwaukee firm that offers retirement, tax, estate, career, investment, and wealth planning.

### **Key Factors That Enabled Financial Service Group Inc. to Rank as One of the Top Milwaukee Financial Advisors**

#### **Value-Based Approach**

Part of what makes Financial Service Group a top financial advisor in Milwaukee comes from their value-based approach. All financial services are given from a comprehensive foundation of core values, which include:

- We do everything with heart
- We honor our commitments
- We are transparent
- We are collaborative
- We never stop learning



Additionally, with a fee-only structure and a fiduciary commitment, clients can trust that all wealth management and financial planning services are unbiased, objective, and wholly in the best interest of the client.

Instead of sales, their income is based on the satisfaction of their clients who will hopefully continue working with them and recommend them to others. Logically, this makes your financial success a priority for this top firm for wealth management in Milwaukee.

## **Client-Centric Process**

Establishing a solid foundation of trust and understanding between a client and their advisor is a key element of the financial planning process.

As a top Wisconsin financial advisor, Financial Service Group implements the following steps to build and maintain relationships with clients:

### The Beginning - Getting The Relationship Started

- Finding your fit
- Discovery & goal setting
- Alignment meetings
- Implementation

### The Middle - Living Your Great Life

- Review meetings
- Tax advice & preparation
- Investment management
- As needed meetings
- Referral partners

### The End - When It's Time to Part Ways

- End of the relationship
- Death
- Estate distribution to heirs
- Financial decisions of your heirs



### *Top Financial Advisors in Milwaukee*

#### **Rating Summary**

With a fee-only structure and a fiduciary commitment, Financial Service Group provides an ideal, wholly client-centric approach to financial services, laying the foundation for trust and transparency.

By encouraging long-term financial planning relationships—and structuring their financial services to provide lifelong benefits—Financial Service Group earns a 5-star rating as one of the top Wisconsin financial advisors to consider partnering with this year.

***Related: Top Financial Advisors and Wealth Managers in Los Angeles, California***

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## **Hogan Financial Review**

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Founded in 1992, [Hogan Financial](#) is a fee-only financial advisor in Milwaukee with a fiduciary commitment to act in the best interest of their clients at all times.

With a personable and clear approach, Hogan Financial specializes in comprehensive financial planning, portfolio creation, and investment management with an emphasis on creating dynamic, long-term relationships.

## **Key Factors That Enabled Hogan Financial to Rank as One of the Top Milwaukee Financial Advisors**

### **Financial Planning for Life Transitions**

As a top financial advisor in Milwaukee, Hogan Financial applies a keen focus to helping clients navigate through various life transitions and maintain good financial health.

These transitions include:

- **Setting Your Course**—Geared towards young professionals, services from this top Wisconsin financial advisor can help cultivate good financial habits early on, like building cash reserves and creating a stable investment foundation.
- **Expect the Unexpected**—Financial stability is crucial when weathering change, which could mean a change in health, adopting a new career, purchasing a home, or simply understanding daily cash flow.
- **Work and Life**—Balancing work and life together often reflect financial values, and may include saving, long-term investing, tailoring income and estate tax planning, and more.
- **Retirement**—This is a period of growth and transition, and these Milwaukee financial advisors can assist with setting up daily cash flow, putting the finishing touches on retirement plans, refreshing estate tax planning, and more.
- **Old Age Knocks at the Door**—In retirement, financial concerns revolve around automating your daily financial life, sharing necessary financial information, and even choosing a retirement facility.

### **Focus on Partnership & Transparency**

Part of what makes Hogan Financial stand out as a top financial advisor in Milwaukee—and across the state of Wisconsin—is the firm’s dedication to maintaining positive client relationships.

As a fee-only firm with a fiduciary commitment, Hogan Financial demonstrates a high level of transparency, supporting trust between each client and their advisor.

Additionally, each financial service is provided with partnership in mind, creating a collaborative and rewarding financial planning experience. These Milwaukee financial advisors are dedicated to:

- Understanding your values and goals

- Providing assistance with family financial conversations and education
- Integrating career and financial planning
- Providing close, respectful assistance during transitions
- Acting as a resource and guide during unpredictable life events
- Providing access to expert, personal advice
- Brainstorming with advisors who understand you, your situation, and your concerns



*Hogan Financial*

### **Rating Summary**

For clients that want a truly personalized, in-depth, boutique financial planning experience, Hogan Financial is a great fit.

While the firm is certainly the smallest on our list, their small size and relationship-based focus provides clients the benefit of one-on-one attention and care, something which can often be missed by larger firms.

With two highly-qualified advisors, comprehensive services, a focus on building relationships, and a unique, down-to-earth approachability, Hogan Financial is one of the best financial advisors in Wisconsin to consider partnering with this year.

***Popular Article: Top Financial Advisors in D.C., Maryland, and Virginia (Tri-State)***

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## **Investors Advisory Group Review**

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Established in 1985 in Waukesha, Wisconsin, [Investors Advisory Group](#) (IAG) is devoted to helping clients make effective wealth management decisions.

Uniquely, IAG maintains a spiritual commitment, keeping the Christian faith as a foundation for wealth management.

Although IAG uses a fee-based structure, we have included them as a top Wisconsin financial advisor for their independence, fiduciary commitment, and strong history of client satisfaction.

### **Key Factors That Enabled Investors Advisory Group to Rank as a Top Financial Advisor in Wisconsin**

#### **Portfolio GPS**

To address various goals, incomes, and risk tolerances, IAG uses Portfolio GPS—a proprietary process that assists your Wisconsin financial planner with choosing which strategy to implement for your investments.

With Portfolio GPS, your Wisconsin financial advisor will ensure that your investment risk is in line with your goals and time horizon, while establishing a framework within which clients can understand their investment planning process.

- **Set Your Destination**—Determine portfolio objectives and risk guidelines
- **Enter the Financial Coordinates**—Analyze current investment portfolio, develop strategic and tactical asset allocation strategy, and construct investment portfolio
- **Chart Your Course**—Assess macro- and micro- economic trends and outlook for global capital markets, and conduct rigorous due diligence using institutional quality analytics
- **Navigate To Your Destination**—Evaluate progress of portfolio, recommend adjustments, and conduct real-time monitoring of "Green Zone" progress

## **Holistic Wealth Management**

One of the founding principles of Investors Advisory Group is its integration of every factor of a client's financial life into comprehensive wealth strategies.

These wealth strategies are separated into eight categories of diverse and comprehensive services, including:

- Financial Snapshot
- Retirement Planning
- Tax Planning
- Investment Planning
- Insurance & Liability Management
- Estate & Legacy Planning
- Business Succession Planning
- Executive Compensation Management

With over 200 years of combined wealth management and financial planning experience, each Wisconsin financial advisor has the right tools at their disposal to support each client's financial success.



*Top Wisconsin Financial Advisors*

With a fiduciary commitment, Investors Advisory Group is required by law to put the interests of the client ahead of their own.

This is crucial for any Wisconsin financial advisor, but particularly for fee-based firms, as they are more likely to encounter conflicts of interest through earning commission.

Their fiduciary commitment ensures that the financial advisors in Wisconsin at IAG will always act in your best interest. Additionally, they are committed to staying current with financial trends, products, and practices, which helps them to make responsible decisions about their clients' investments.

The firm's focus on using a faith-based approach to investment management and financial planning also makes IAG a great choice for clients that want their advisor to share their values, solidifying the firm's ranking as a top financial advisor in Wisconsin.

***Read More: Best Financial Advisors in Oklahoma City & Tulsa, Oklahoma***

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## **Landaas & Company Review**

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Managing over \$2 billion on behalf of thousands of clients, [Landaas & Company](#) is one of the top Wisconsin financial planners due to its far-reaching experience and commitment to fulfilling the objectives and needs of individual investors.

Although Landaas & Company is a [fee-based](#) financial advisor in Milwaukee, their independent status assures clients that the firm's interests will always come second.

### **Key Factors That Enabled Landaas & Company to Rank as a Top Financial Advisor in Milwaukee**

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

While Landaas & Company largely focuses on portfolio construction and management, these financial planners in Milwaukee are well-equipped to tackle a variety of additional financial challenges, including:

**Retirement Planning**—Helps clients establish retirement income requirements, understand retirement plans and alternative savings options, and more

**Education Planning**—Estimates higher education costs and creates strategies to meet those financial goals

**Estate Planning**—Provides adequate financial security for loved ones, keeping liquid assets in estate, transferring the maximum percentage of assets, and more

**Long-Term Care**—Protects retirement assets to ensure that long-term care does not interfere with goals and dreams

**Pension Planning**—Helps business owners with SEP, SIMPLEs, profit sharing plans, IRAs, 401ks, and more

## **Educational Resources**

Few firms invest as much in client education as Landaas & Company. The [Money Talk](#) page is a culmination of over 35 years of public education and outreach initiated by Bob Landaas, the president of the company.

In addition to a weekly Money Talk podcast, this top financial advisor in Milwaukee supports financial literacy through videos, financial tools, featured articles, and relevant financial news.

*Regular features from the firm's educational archives include:*

- **Ask Money Talk**—Questions from podcast listeners are answered by investment professionals
- **Bob's View**—Monthly perspectives from founder Bob Landaas
- **Talking Money**—Explanation of common financial terms and concepts
- **What We're Reading**—Samples of what the financial planners in Milwaukee at Landaas & Company are interested in

## **Rating Summary**

As one of the top Milwaukee financial advisors, Landaas & Company demonstrates a strong commitment to providing expert services and giving clients a solid foundation of financial knowledge.

Their independent status and fiduciary duty as a fee-based Milwaukee financial advisor ensures that all conflicts of interest are handled with transparency and in the best interest of the client, earning Landaas & Company a spot among the best financial advisors in Wisconsin.

***Related: Top Financial Advisors in Iowa (Des Moines, Ames, Dubuque, and Davenport)***



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## McCarthy Grittinger Financial Group LLC Review

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Founded in 1995, [McCarthy Grittinger Financial Group LLC](#) has grown to become one of the top [fee-only](#) investment advisory and financial planners in Milwaukee and in all of southeastern Wisconsin.

This Wisconsin financial advisory firm provides independent financial planning and investment services for a variety of individuals and families.

### **Key Factors That Enabled McCarthy Grittinger Financial Group LLC to Rank as a Top Financial Advisor in Milwaukee, Wisconsin**

#### **Range of Expertise**

As one of the best Milwaukee financial advisors, McCarthy Grittinger offers three core areas of service expertise:

- **Financial Planning**—Seeks to create positive relationships, uncover goals, and take education, insurance, taxes, and estate planning into consideration
- **Investment Management**—Integrated financial planning and investment management service is tailored to individual needs and goals
- **Tax Analysis**—Helps clients prepare for taxes by identifying, discussing, and implementing expert strategies

No matter what area of service a client falls into, these Milwaukee financial advisors aim to use a holistic approach, taking into account matters beyond investments to provide a truly comprehensive experience.

#### **Focus on Trust & Transparency**

As a top financial advisor in Milwaukee, McCarthy Grittinger aims to build long-term personal relationships with its clients.

A large part of this relationship is built on trust and transparency. The firm emphasizes its belief in integrity as well as the importance it places on its fiduciary responsibilities.

The fee-only status of the firm helps support their firm's commitment to honesty between clients and their Milwaukee financial advisors, supporting positive long-term relationships and a personalized financial planning experience.

## Rating Summary

As a top financial advisor in Milwaukee, McCarthy Grittinger Financial Group provides clients with a solid foundation of transparency and trust through their fee-only structure and fiduciary commitment.

While the firm offers three key areas of financial planning and wealth management, it may be difficult for potential clients to fully evaluate the firm without full, detailed descriptions of what each branch of service entails.

By providing specific information on topics like investment strategies, typical portfolio construction, and financial planning services, McCarthy Grittinger could easily improve both their value proposition to new clients and their 3-star rating as a top advisor in Milwaukee, Wisconsin.

***Don't Miss: Best Financial Advisors in San Antonio and New Braunfels, Texas***

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## North Star Asset Management, Inc. Review

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Located in Menasha, WI, [North Star Asset Management, Inc.](#) is one of the top wealth management firms in Wisconsin.

With over 200 years of combined experience, the firm provides expert investment management services to private individuals, institutions, corporations, and foundations.

As a [fee-only](#) Wisconsin wealth management firm, its independent status and flexible investment strategy provides clients with service that is both focused and skillful.

### **Key Factors That Enabled North Star Asset Management, Inc. to Rank as a Top Financial Advisor in Wisconsin**

#### **Large, Experienced Team**

Compared to other Wisconsin wealth management firms, North Star has one of the largest teams of directors, managers, and administrators. The team is composed of nearly 20 investment professionals with a range of professional designations.

With over 200 years of collective experience on the team, clients can benefit from a wide range of professional experience and core industry accreditations, including:

- CFA®

- CFP®
- CPA
- IACCP®

By combining a large team with these core credentials, North Star is well-prepared to assist clients with a variety of investment challenges, supporting a dynamic, long-term relationship.

### **Flexible Investment Management**

This Wisconsin wealth management firm is also committed to creating specific strategies to fit each client's circumstances, objectives, and risk tolerance, making North Star one of the most adaptable services on this list.

By using individual securities, North Star can provide clients with greater control and flexibility, optimizing tax situations and return requirements, helping clients make better progress towards their goals in the long run.

Portfolios constructed by North Star include the following:

- Growth equity & fixed income securities
- Open and closed-end mutual funds
- Open and closed-end exchange traded funds



*North Star Asset Management*

### **Rating Summary**

With over \$1 billion in assets under management, North Star Asset Management is the second-largest independent financial advisor in Wisconsin, making the firm a great choice for clients that want their finances in capable, experienced hands.

With an experienced team and a fee-only commitment, North Star provides expert investment management, earning the firm a spot among the top financial advisors in Wisconsin.

However, it's worth mentioning that prospective clients may find it difficult to evaluate the firm without a clear, detailed listing of what each service entails.

With investment management and 401k services as their sole service offerings, North Star Asset Management could easily improve both their value proposition to clients and their 3-star rating by clarifying details of sub-services, like retirement planning and administrative services.

***Popular Article: Top Financial Advisors in Greensboro, Chapel Hill, and Winston-Salem, North Carolina***

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## **PJS Investment Management Review**

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Located in Cedarburg, [PJS Investment Management](#) is a [fee-only](#) financial advisor in Wisconsin that features a disciplined approach to helping clients meet current and future cash flow needs.

The firm's commitment to keeping clients updated on their portfolios and on market trends makes PJS Investment Management an optimal choice for those who want to maintain a clear picture of their finances.

### **Key Factors That Enabled PJS Investment Management to Rank as a Top Wisconsin Financial Advisor**

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

Part of what makes PJS Investment Management a top Wisconsin financial advisor is the firm's commitment to providing streamlined processes for each branch of service.

Not only does this make it easy for potential clients to evaluate the firm, but it also demonstrates the firm's commitment to transparency, a crucial aspect of any successful wealth management relationship. These services include:

- **Investment Management**—Discuss expectations, develop individualized recommendations, create a tailored portfolio, and more
- **Financial Planning**—Develop an all-inclusive financial view, establish current and future objectives, and provide custom-tailored advice

- **Tax Planning**—Review tax returns, refer to any changes in tax laws, track cost basis, deliver annual summaries, and work alongside tax professionals
- **Cash-Flow Planning**—Budget development and tracking, converting portfolio wealth into retirement income, and more
- **Insurance Planning**—Review current coverage and refer to an insurance professional to address any potential weak spots

### **Clear Investment Strategy**

The primary emphasis of PJS Investment Management’s investment process is controlling risk through diversification. This team of Wisconsin financial advisors follows a clear strategy based on time-tested principles.

They look at specific criteria when making individual stock selections, including:

- Leading market positions for its products and services
- Strong management team with a clear vision and action plan for the future
- Strong financial position with satisfactory liquidity reserves
- Essential services or products whose demand continues even in slow-growth economic atmospheres
- Operation in countries with a steady political environment and promising growth prospects as well as in an industry poised for long-term growth
- Attractive dividend yield and possibilities for continued dividend growth



### *PJS Investment Management*

#### **Rating Summary**

As a fee-only Wisconsin financial advisor, PJS Investment Management provides their clients with independent services and transparent pricing, setting the client-advisor relationship up for success over the long-term.

The firm also provides a comprehensive range of detailed services and an in-depth look at their investment philosophy, increasing transparency and solidifying their ranking as a top financial advisor in Wisconsin.

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## **Savant Capital Management Review**

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Located in Park Falls and Madison, [Savant Capital Management](#) is an independent, fiduciary financial advisor, helping clients achieve their financial goals since 1986.

As a [fee-only](#) financial planner in Madison WI, Savant aims to help clients maximize their investments while safeguarding themselves and their assets during the journey.

## **Key Factors That Enabled Savant Capital Management to Rank as a Top Financial Advisor in Madison, WI**

### **Assessment-Based Approach**

As one of the best financial planners in Madison, WI, Savant Capital not only wants to grow your portfolio, but they also want to help you plan and save for life's unpredictable events.

To this end, Savant asks you to complete *The Ideal Futures Financial Health Assessment*<sup>SM</sup> to help get a better idea of where you are in life and how to help you move forward.

This proprietary process covers 10 key planning areas that represent the core financial planning philosophy of these financial planners in Madison, WI:

- Vision & Goals
- Retirement Planning
- Risk Management & Asset Protection
- Debt Management
- Education Planning
- Income Tax Planning
- Investment Planning
- Estate Planning & Administration
- Business Planning & Succession
- Charitable Planning

After completing this initial process, Savant has two additional assessments to help clients identify goals, create customized financial plans, and bring organization to their finances, called *The Building Ideal Futures Process*<sup>TM</sup> and *The Ideal Futures Portfolio*<sup>TM</sup>.

### **Targeted Audience**

Savant Capital Management focuses on high-net-worth individuals who want to preserve their hard-earned capital and pursue steady, wise growth.

However, more than most financial advisors in Madison, WI, Savant also provides some leeway in allowing you to meet the necessary criteria for becoming a client. One of these criteria must be met:

- Projecting a portfolio valuation of \$500,000 or more within the next 12 months
- Expecting a portfolio of \$1,000,000 by the end of 5 years
- Immediate family member of an existing Savant client with a portfolio of more than \$5,000,000
- Paying a \$5,000 minimum annual fee to cover investment management services

Another great aspect of Savant Capital Management is its expanded reach. From their locations in Wisconsin, Illinois, and Virginia, the firm serves clients across the nation and in Asia, Australia, and Europe.



*Savant Capital Management - Madison, WI*

## **Rating Summary**

As a fee-only financial planner in Madison, WI, Savant Capital Management puts a strong emphasis on transparency and trust.

The firm welcomes phone calls to request additional information on their fee structure, and provides no-obligation consultations for potential clients to receive a complimentary assessment.

With three detailed, proprietary approaches to wealth management and financial planning, Savant Capital Management is a top financial advisor in Madison, WI to consider partnering with this year.

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## **Conclusion - Top 10 Financial Advisors in Wisconsin**

Now that you have read a list of top financial advisors in Milwaukee, Madison, Waukesha, Cedarburg, and more, you should be better prepared to answer these questions:

- Where can I find the best wealth managers and financial advisors in Wisconsin?



- Where should I go if I am looking for additional services like estate planning, tax management, and risk management?
- What types of fees do Wisconsin financial planners charge, and which financial advisor is best for me?

The next step to take is to choose a few Wisconsin financial advisory firms from the list that seem to best suit your needs and set up an introductory meeting with each firm.

After that, you will have all the information you need to make an informed decision and make yet another step towards improving your financial health.

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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://pixabay.com/en/milwaukee-wisconsin-art-museum-1809577/>
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