

---

# **10 Best Financial Advisors in D.C., Maryland, & Virginia (Tri-State) | 2018 Ranking**

---

## **RANKING & REVIEWS BEST FINANCIAL ADVISORS IN THE TRI-STATE AREA**

---

### **2018 Ranking of the Top Wealth Management Firms in D.C., Maryland, and Virginia (Tri-State)**

Financial stability. Security. Peace of mind. The growth of wealth. Long-term retirement strategies. Preservation of wealth across generations.

These are some of the reasons that clients become involved with wealth management and investment advisory firms in the tri-state area. After all, the role of a wealth manager often goes far beyond accounting.

Instead, it is about creating a strategy that's beneficial for clients in the short and long term. Choosing a wealth management firm in D.C., Maryland, or Virginia is a significant decision.

Not all wealth advisors are the same, and without a dedicated financial advisor in D.C., Maryland, or Virginia, clients could be left with inadequate planning for their unique financial situation.

On the other hand, when you select one of the top Maryland, Virginia, or D.C. financial advisors, you can preserve your wealth, grow it over time, and meet your lifestyle objectives.

The following is a list of the top-ranked wealth management firms in D.C., Maryland, and the Virginia metro area. These wealth management firms in the tri-state area are well-known and have an established presence.

Our ranking of financial advisors in D.C., Maryland, and Virginia looks at each firm's investment approach, philosophy, reputation, the qualifications of their team, and more to help you find your personal best financial advisor in D.C., Virginia, or Maryland.



*Award: Top 10 Best Financial Advisors in the Tri-State Area*

## **Top 10 Best Financial Advisors in the Tri-State Area | Brief Comparison & Ranking**

<b>Best Financial Advisors in the Tri-State Area</b>	<b>Highlighted Features</b>	<b>Ratings</b>
Burt Wealth Advisors	Clear, simple approach to wealth management	5
Cassaday and Company	Wide range of industry certifications	5
FAI Wealth Management	Extensive range of services for Individuals & Families	5
Glassman Wealth Services	Award-winning firm culture	5
Halpern Financial	Wide variety of financial services	5
Kendall Capital	Services for “Middle-class Millionaires”	5

McLean Asset Management	InStream Solutions <sup>SM</sup>	5
The Family Firm	Situation-based investment philosophy	5
Harbour Capital Advisors	Focus on becoming a “Personal CFO” for clients	3
FBB Capital Partners	Individualized, client-centric process	3

*Table: Top 10 Best Wealth Management Firms in D.C., Maryland, and Virginia (Tri-State) Area | Above list is sorted by rating*

---

## **Tips for Selecting the Best Financial Advisors in D.C., Maryland, & Virginia**

When it comes to choosing the best financial advisor in Washington, D.C. and the surrounding areas, there are plenty of options. With so many firms to consider, how can you narrow the search?

First, take a close look at what each Virginia, D.C., and Maryland 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 Virginia, Maryland, and D.C. financial advisors, 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 better-suited with a financial planner in D.C. that offers a broader range of services.

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

Whether it’s a free or paid consultation, this can be a good way to “feel out” a prospective financial advisor in D.C., Maryland, or Virginia before committing to their services.



*Top Wealth Management Firms in Virginia, D.C., and Maryland*

---

## **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 Financial Advisors in D.C., Maryland, and Virginia (Tri-State Area)**

Below, please find the detailed review of each firm on our list of the best wealth management firms in the tri-state area. We have highlighted some of the factors that allowed these financial advisors in D.C., Maryland, and Virginia 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.

- [Burt Wealth Advisors](#)
- [Cassaday & Company, Inc.](#)
- [FAI Wealth Management](#)
- [FBB Capital Partners](#)
- [Glassman Wealth Services](#)
- [Halpern Financial](#)
- [Harbour Capital Advisors](#)
- [Kendall Capital Management](#)
- [McLean Asset Management](#)
- [The Family Firm](#)

Click below for previous years' rankings:

- **2016 Review:** [Top 12 Best Financial Advisors in D.C., Maryland, & Virginia](#)
- **2017 Review:** [Top 11 Best Financial Advisors in D.C., Maryland, & Virginia](#)

---

## Burt Wealth Advisors Review

---

Located in Rockville, Maryland, [Burt Wealth Advisors](#) is a [fee-only](#) Maryland financial advisor that works with high-net-worth individuals, families, and business owners, with the goal of protecting assets across generations.

With lead advisors bringing anywhere between 15-25 years of experience, clients can trust that their financial future is in good hands with Burt Wealth Advisors.

**Key Factors That Enabled Burt Wealth Advisors to Rank as One of the Top Financial Advisors in Maryland, Virginia, & D.C.**

### Investment Approach

There are four primary components of the investment approach utilized by Burt Wealth Advisors. These include:

- **Personalized Service:** Each client relationship begins by taking a thoughtful, collaborative approach to goals, objectives, timelines, risk tolerance, and tax considerations.

- **Portfolio Construction:** Each portfolio is designed and diversified to represent the right mix of investments based on client goals.
- **Rigorous Oversight:** The analysts at this tri-state wealth management firm follow a carefully defined process to find money managers, offering stringent supervision and making adjustments as necessary.
- **Reporting:** Quarterly progress reports look at asset allocation, interest and dividends, gains and losses, rate of return on an annualized basis, and portfolio balance.

## Services

As a leading Maryland financial advisor, Burt Wealth Advisors offers a variety of services to help clients have peace of mind and a simplified financial situation.

Services include:

- **Financial Planning**—Retirement, tax reduction, business planning, and education funding
- **Estate Planning**—Distribution, minimizing expenses, and estate tax planning
- **Wealth Management**—Investment strategies for complex situations, strategies for estate, tax, and business owners, and inter-generational wealth transfer
- **Tax Planning**—Monitor changes and rulings while working closely with client accountants
- **Charitable Planning**—Gifting strategies both during one’s lifetime and through an estate
- **Investment Strategies for Women**—Focus on a longer lifespan, wage disparities, and fewer working years

Also included as part of the available services from this Maryland financial planner are investment management, portfolio construction, and portfolio management.



*Top Financial Advisors in Washington D.C.*

### **Rating Summary**

Since 1985, Burt Wealth Advisors has been a leading D.C., Virginia, and Maryland financial advisor, continuously providing in-depth and robust wealth management services.

With a fee-only structure and a fiduciary commitment to uphold the highest standards of transparency and trust, Burt Wealth Advisors is one of the best financial advisors in Maryland, D.C., and Virginia to consider partnering with this year.

***See Also: Top Financial Advisors in Tampa, St. Petersburg, and Palm Harbor, Florida***

---

## **Cassaday & Company, Inc. Review**

---

[Cassaday & Company, Inc.](#) is an independent advisory and financial planning Virginia financial advisor founded in 1993.



While the firm seems to be largely fee-based, it's worth mentioning that Cassaday & Company's [ADV](#) states that they provide "fee-only advisory business" and "commission-only brokerage accounts."

We have included them for their independence, client-centric culture, wide range of professional certifications, and strong history of industry recognition. As always, we recommend verifying fee structure before partnering with any financial advisor in Virginia, D.C., or Maryland.

## **Key Factors That Enabled Cassaday & Company, Inc. to Rank as One of the Top Wealth Management Firms in D.C., Virginia, & Maryland**

### **Professional Certifications**

Compared to competing financial advisors in Washington D.C. and Virginia, the team at Cassaday & Company boasts an impressive array of industry certifications.

With Cassaday & Company, clients can benefit from partnering with a Virginia financial advisor that is truly prepared for a wealth of financial challenges, as demonstrated by the following professional designations:

- Certified Financial Planner—CFP®
- Certified Fund Specialist—CFS®
- Certified Private Wealth Advisor—CPWA®
- Certified Investment Management Analyst—CIMA®
- Chartered Mutual Fund Counselor—CMFC®
- Certified Annuity Specialist—CAS®
- Accredited Investment Fiduciary—AIF®
- Education Loan Specialist—ELA™
- Certified College Funding Specialist—CCFS®
- Certified Estate and Trust Specialist—CES™
- National Social Security Advisor—NSSA™
- Certified Annuity Specialist—CAS®

It's also worth noting that the average tenure of the staff members at Cassaday & Company is 15 years, pointing to a positive corporate culture and long-term relationships between clients and their Virginia financial advisor.

### **Focus on Client Service**

Cassaday maintains a firm size that allows it to be flexible and agile during each client engagement. As such, these Virginia financial advisors are well-versed at creating and maintaining a comprehensive, client-centric approach.

Through a culture based on support and personalized service, Cassaday & Company ensures that interests remain at the center of everything it does through features like:



- A competent, experienced staff
- Online account access for clients
- Simple, easy to understand statements
- Comprehensive, personal guidance for all clients
- Staff members can easily access top management
- No recordings, no robots, and no automated phone menus
- Ongoing education and training for staff
- Clients receive regular reporting of their investment results

As a result of this client-centric culture, Cassaday & Company continues to gain positive recognition from leading financial publications like Barron's, Inc. 5000, Forbes, and more.

### **Rating Summary**

As an independent firm with a fiduciary commitment, clients can trust that the Virginia financial advisors at Cassaday & Company will only recommend the products that work best for them, rather than selecting financial products based on industry affiliations or personal gain.

With an incredibly client-centric culture, an impressive range of industry certifications, and a fierce independence, Cassaday & Company is one of the best financial advisors in Virginia and D.C. to consider partnering with this year.

***Don't Miss: Best Financial Advisors in Pittsburgh, Pennsylvania***

---

## **FAI Wealth Management Review**

---

Founded in 1987, [FAI Wealth Management](#) is a [fee-only](#) financial advisory firm in Maryland.

They offer a selection of financial advisory services to proactively help clients navigate life events, separating their areas of service into Individuals & Families, Business Executives, and Industry Professionals.

**Key Factors That Enabled FAI Wealth Management to Rank as One of the Top Wealth Management Firms in D.C., Virginia, & Maryland**

**Four-Stage Process**

Working with a wealth management firm for the first time can be an intimidating experience. To help clients ease into this new working relationship, these Maryland financial advisors use a four-stage introductory process.

Created to be objective, transparent, responsive, and simple, this process includes:

- **Goals**—The Maryland financial advisors at FAI take time to understand each client’s vision, goals, and priorities
- **Strategy**—This collaborative process integrates all available resources to create a unique and effective plan of action, acting as the foundation for all future meetings
- **Implementation**—With strategy as the foundation, portfolio recommendations are implemented, and parameters for tracking and accountability are established
- **Monitoring**—Ongoing monitoring is upheld through mutually agreed-upon benchmarks, updating each year to ensure that goals are being achieved and to make adjustments as needed

### **Wide Range of Services for Individuals & Families**

This Maryland wealth management firm boasts an impressive array of financial planning services for individuals and families, with a unique focus on guiding clients through significant life transitions. Available services include:

- Marriage
- Divorce
- Widowhood
- Special Needs Planning
- Children & Grandchildren
- Estate/Legacy Planning
- Aging Parents
- Encore Careers
- Engineers
- Personal Retirement Planning
- Age Milestones
- New Wealth
- Real Estate



*FAI Wealth Management Team*

### **Rating Summary**

Compared to competing financial advisors in Maryland, D.C., and Virginia, FAI Wealth Management certainly has the most diverse range of financial planning and wealth management services for individuals and families.

Not many firms place such an expert focus on providing guidance through various life transitions, making FAI an excellent choice for those seeking a long-term financial planning relationship.

With the additional benefits of high transparency and a fee-only structure, FAI Wealth Management earns a 5-star rating as one of the best financial advisors in Maryland, D.C., and Virginia.

***Related: Best Financial Advisors in Miami and Coral Gables, Florida***

---

## **FBB Capital Partners Review**

---

Founded by Susan Emma Owens Breakefield Fulton, [FBB Capital Partners](#) is highly respected among D.C., Maryland, and Virginia financial planners.

For over 25 years, the firm has been offering wealth management, investment, and financial planning services in Virginia and Maryland with a highly personalized approach and a [fee-only](#) structure.

## Key Factors That Enabled FBB Capital Partners to Rank as One of the Top Wealth Management Firms in D.C., Virginia, & Maryland

### Client-Centric Process

Since the firm's founding in 1989, the goal has always been to ensure clients have a steady growth of capital and predictable income to increase their financial security.

This is achieved by looking at each individual situation and adjusting strategies over time as the financial and investment market environments inevitably change, shown in detail in the image below.



*Best Virginia Wealth Management Firms - FBB Capital Partners*

### Flexibility

As a top financial advisor in D.C., Maryland, and the Virginia metro area, FBB distinguishes itself with its flexible portfolio management strategies.

Every FBB client works with a dedicated portfolio manager. Rather than receiving a one-size-fits-all portfolio approach, clients will find that everything is based on their goals, risk preferences, tax situation, and timeline.

Additionally, the advisement team at FBB will work with a client's other key advisors, including accountants and lawyers.

### **Rating Summary**

As one of the best Maryland and Virginia financial planners, FBB Capital Partners provides ample value for their investment management clients through a wide range of certifications, industry expertise, and a client-centric focus.

Compared to competing financial advisors in Virginia, Maryland, and the D.C. area, however, FBB Capital Partners falls short in providing specific details on what each step of their investment management process entails.

By providing a detailed explanation of what clients can expect from each step, FBB Capital Partners can easily improve not only their value proposition, but their ranking as one of the best Maryland and Virginia financial planners.

***Popular Article: Top Financial Advisors in Orlando, Florida***

---

## **Glassman Wealth Services Review**

---

Founded in 2009, [Glassman Wealth Services](#) is a [fee-only](#) financial advisor in Virginia.

Located in Vienna, Glassman Wealth Services offers expert investment management, financial planning, retirement planning, and tax and estate planning throughout Virginia, Maryland, and the D.C. metro area.

### **Key Factors That Enabled Glassman Wealth Services to Rank as One of the Top Wealth Management Firms in D.C., Maryland, & Virginia**

#### **Client-Centric Focus**

A hallmark of the best Virginia wealth management firms is often the emphasis that they place on the client-advisor relationship. For Glassman Wealth Services, the client experience is paramount, demonstrated through the following commitments:

- **We Listen More**—These D.C. financial advisors take the time to listen, ask questions, and truly get to know each client before creating an investment plan

- **We Help You Understand More**—Financial matters are often complex, but Glassman Wealth Services goes the extra mile to ensure that clients truly understand
- **We Reach Out More**—As a boutique firm, the Virginia financial advisors at Glassman Wealth Services have the expertise and resources to take the initiative when providing one-on-one attention
- **We Take It Personally**—Above all else, the firm prioritizes personal service for each client, defining success by meeting unique needs

## **Dynamic Firm Culture**

A crucial component of a successful wealth management relationship is how the firm sets their advisors up for success, a factor which is often missed by competing financial advisors in Virginia.

In contrast, Glassman Wealth Services places a high premium on setting their advisors up for success through maintaining a positive and encouraging culture through:

- **Transparency**—As a fee-only advisor with a fiduciary commitment, Glassman Wealth Services upholds the highest standards of transparency, removing conflicts of interest and paving the way for advisors to put clients first and foremost
- **Curiosity**—The team is challenged to continually explore new scenarios, consider alternative strategies, and to be intellectually curious in every client engagement
- **Managed Growth**—Not only does Glassman Wealth Services limit the ratio of clients to advisors, but the firm also encourages time for reflection and thought, keeping advisors renewed and refreshed

This strong firm culture has a history of attracting and retaining top financial advisory talent within the area, earning the firm recognition as one of the “Best Places to Work” from Inc., the Washington Business Journal, the Washingtonian, and the Washington Business Journal.

## **Rating Summary**

As a fee-only firm with a fiduciary commitment, Glassman Wealth Services provides clients with the ideal financial planning relationship.

Even better, the firm goes the extra mile to promote positive, long-term wealth management by supporting both clients and advisors through their strong firm culture.

With a strong set of services, a commitment to transparency, and an unparalleled culture, Glassman Wealth Services is one of the best financial advisors in D.C. and Virginia to consider partnering with this year.

***Read More: Top Financial Advisors in Omaha, Nebraska***

---

## **Halpern Financial Review**

---

Formed in 1998, [Halpern Financial](#) is an independent, fee-only RIA located in Ashburn, VA and Rockville, MD.

The firm's specialty is in helping high-net-worth individuals and families navigate through small and large financial challenges with unbiased, expert advice.

### **Key Factors That Enabled Halpern Financial to Rank as a Top Financial Advisor in Washington D.C., Maryland, & Virginia**

#### **Wide Variety of Financial Services**

For many clients, finding the best Virginia or Maryland financial advisor means finding a firm that can handle a variety of financial challenges throughout the duration of a wealth management relationship.

As goals and situations fluctuate over time, Halpern Financial is prepared to continue to offer value through an incredibly wide range of financial services, including:

- **Retirement Planning**—Projections, Income Planning, Qualified and Non-Qualified Plans, Minimum Distributions Monitoring
- **Investment Planning**—Portfolio Design and Implementation, After- and Pre-Tax Investment Planning, Real Estate
- **Cash Flow Planning**—Budgeting, Cash Reserve Strategies, Debt Repayment Schedules, Mortgage Analysis, Buy vs. Lease
- **College Planning**—College Projections, College Savings, 529 Plans
- **Tax Planning**—Tax Efficient Portfolio Design, Coordination with Tax Professionals
- **Estate Planning**—Estate Planning Fundamentals, Coordination with Estate Planning Attorney, Multi-Generational Wealth Transfer



- **Charitable Planning**—Donor-Advised Funds, Private Foundations
- **Risk Management**—Review and Analysis of Insurance Needs

### **Professional Affiliations**

As one of the top financial advisors in Maryland, Virginia, and D.C., Halpern Financial maintains membership in a number of well-respected professional organizations, including:

- **National Association of Personal Financial Advisors (NAPFA)**—Requires that firms meet demanding and vigorous standards for transparency and fiduciary duties
- **Fee Only Network**—Requires that firms avoid conflicts of interest by only accepting payment from clients (instead of banks, brokers, or insurers)
- **Financial Planning Association**—Provides networking and continuing education for financial industry professionals
- **International Association of Registered Financial Consultants**—Recognizes firms that have a clean ethics record free from disputes, regulatory events, and/or criminal misdemeanors or felonies

Additionally, several Maryland financial advisors on the Halpern Financial team are Certified Financial Planner™ professionals, meaning that they are also held to stringent codes of ethics and engage in continuing education each year.



### *Halpern Financial*

#### **Rating Summary**

As a fee-only Virginia and Maryland financial advisor with a fiduciary commitment, Halpern Financial provides the golden standard in trustworthy, ethical wealth management.

This foundation is further strengthened by the firm's commitment to maintaining membership in leading professional organizations, providing a system of checks and balances for ethical conduct.

With an impressive range of services, a fiduciary foundation, and a personable, knowledgeable team, Halpern Financial is one of the best financial advisors in Washington D.C., Maryland, and Virginia to consider partnering with this year.

***Related: Top Financial Advisors in Dallas, Texas (Ranking of Dallas Wealth Advisors)***

---

## **Harbour Capital Advisors Review**

---

Located in McLean, Virginia, [Harbour Capital Advisors](#) is a privately owned and independent wealth management firm in Virginia.

As a [fee-only](#) and fiduciary Virginia financial planner, Harbour seeks to help clients address both current and future challenges, leveraging decades of experience in every area from private banking to advanced wealth and tax planning.

## **Key Factors That Enabled Harbour Capital Advisors to Rank as One of the Top D.C., Maryland, & Virginia Financial Advisors**

### **Personal CFO Approach**

The approach undertaken by Harbour Capital Advisors is unique because the firm considers itself as a “Personal CFO” for each of their clients.

As such, these Virginia financial advisors look beyond the surface and take the time required to understand each client’s objectives and priorities.

Clients of this Virginia financial advisory firm also have the benefits of working with a highly experienced team and access to customized solutions to preserve wealth and solve financial challenges.

As part of the Personal CFO approach, this boutique Virginia financial advisory firm provides clients with the benefit of working closely with a dedicated, familiar team.

### **Investment Advisory**

The Virginia financial advisors at Harbour Capital are active, objective, and flexible in their approach. Decisions are based on in-depth assessments, expertise, an observation of global economies, and thorough market research.

Investment Advisory services include the following components:

- All portfolios are actively managed
- Advice is independent
- The approach is a top-down macro analysis of both market and larger economic drivers
- There is a sense of flexibility, allowing strategy evolution based on changing circumstances
- Clients receive the benefit of full reporting across all providers
- Investment advisors will work in conjunction with wealth and tax planning teams

Along with comprehensive Investment Advisory services, these Virginia financial planners also offer Wealth Planning and Family Office services for clients that want in-depth financial planning.



*Harbour Capital Advisors*

**Rating Summary**

With a fee-only structure and a fiduciary commitment, Harbour Capital Advisors exemplifies the ideal partnership with a Virginia financial advisor.

Clients can trust that all financial advice is given without bias or conflict of interest, building a solid foundation for a long-term, dynamic financial advising relationship.

However, in comparison to competing financial advisors in and around Washington D.C., Harbour Capital's website is slightly outdated and somewhat difficult to navigate, particularly for mobile users.

By refreshing their website, Harbour Capital would easily improve their brand presence and accessibility for prospective clients, improving their rating as a top Virginia financial advisor in the process.

***Don't Miss: Top Financial Advisors in Kansas City, Leawood, and North Kansas City***

---

**Kendall Capital Management Review**

---

Located in Rockville, Maryland, [Kendall Capital Management](#) is a trusted and respected wealth management firm.

As a [fee-only](#) Maryland financial advisor, Kendall Capital Management seeks to help clients preserve, strengthen, and grow their wealth through sound investment strategies.

## **Key Factors That Enabled Kendall Capital Management to Rank as One of the Top Financial Advisors in Maryland, D.C., & Virginia**

### **Middle-Class Millionaires**

While many investment advisors in the metro area work largely with high-net-worth individuals and wealthy families, Kendall also offers another area of focus for "middle-class millionaires."

Many middle-class individuals are in comfortable financial situations—and with the right financial advice, their current wealth can be leveraged to something greater.

Moreover, they may come into money through an inheritance or be approaching retirement and need advice. Unfortunately, most wealth management firms only serve high-net-worth individuals, making this guidance hard to access.

As such, this Maryland financial advisor offers middle-class millionaire services to provide access to unique opportunities and investment management tactics that can help them preserve their wealth.

### **Wealth Management Services**

Much of what the firm offers regarding wealth management is aimed at those who own small businesses or have more than \$500,000 in investable assets. Wealth management services from Kendall Capital can help clients address the following areas:

- Cash flow projections that show the potential impact on net worth
- Projections for education funding and strategies for saving
- Retirement requirements, funding, and the development of viable strategies
- Designing of customized investment portfolios and allocation
- Income tax planning
- Wealth transfer and estate planning
- Social Security evaluation
- Philanthropic planning



*Kendall Capital*

### **Rating Summary**

While the team at Kendall Capital may be smaller than competing financial advisors in Maryland, D.C., or Virginia, this offers clients the unique opportunity to receive one-on-one, personalized attention from their financial advisor.

This boutique approach is often something that larger firms cannot provide, adding to the value brought by Kendall Capital.

With a fee-only, independent structure and a wide range of financial services for both middle-class and high-net-worth clients, Kendall Capital is one of the best financial advisors in Maryland for clients in the tri-state area to consider partnering with this year.

***Popular Article: Top Financial Advisors in Wisconsin (Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon)***

---

## **McLean Asset Management Review**

---



Founded in 1984, [McLean Asset Management](#) is a Virginia financial planner focused on providing individuals and employers with general retirement planning, wealth management, and investment advice.

Although McLean Asset Management is a [fee-based](#) Virginia financial advisor, we have chosen them for their fiduciary commitment, distinctive approach, and advanced financial solutions.

## **Key Factors That Enabled McLean Asset Management to Rank as One of the Top Maryland, D.C., & Virginia Wealth Management Firms**

### **Distinctive Approach**

McLean prides itself on taking a focused approach to retirement planning, based on in-depth research and an evidence-based foundation. That said, this Virginia wealth management firm conducts an in-depth discovery process to get the necessary client input.

The discovery process at McLean is driven by details. It begins with a risk questionnaire and an in-person meeting to learn more about the client's preferences, goals, values, and future life events that could impact their financial situation.



*McLean Asset Management Approach*

### **InStream Solutions<sup>SM</sup>**

Even if a client is only able to meet with their financial planners in Virginia once a year, they will always have the peace of mind that comes with knowing McLean is constantly monitoring their financial situation.

Portfolios and strategies are assessed and monitored in an ongoing way. Advisors use [InStream Solutions<sup>SM</sup>](#), a signature platform created by the company to alert them of changes in client accounts.

If notable changes are seen, these Virginia financial advisors will alert clients and let them know what the impact of these changes could be.



Additionally, U.S. and global events are constantly monitored, meaning that if a client's portfolio could be impacted, this information can easily be passed along, and the portfolio can be adjusted accordingly.

## **Rating Summary**

As a registered investment adviser, McLean Asset Management is legally held to the fiduciary standard, meaning that all investment and financial advice must be transparent and in the best interest of the client.

Moreover, McLean strives to provide comprehensive financial planning and wealth management services that are approachable, decreasing the stress and frustration that often comes from seeking out financial services.

With a fiduciary obligation, a distinctive approach, and comprehensive solutions for both wealth management and investment management, McLean is one of the best Virginia financial advisors to consider partnering with this year.

---

## **The Family Firm Review**

---

[The Family Firm](#) is an independent [fee-only](#) financial advisor in Washington D.C. and Maryland that provides a wide range of financial services, from investment management to educational planning and charitable giving strategies.

### **Key Factors That Enabled The Family Firm to Rank as a Top Financial Advisor in Washington D.C., Virginia, and Maryland**

#### **Interactive Process**

Each client's strategy is unique and specific to their situation. In developing these strategies, this Maryland wealth management firm uses a guided process built around four separate meetings with clients.

Their process begins with the first year, where advisors meet with clients to discuss and assess their financial activities. These meetings are very interactive and come with direct participation from founder Nathan Gendelman.

Afterwards, investment plans and portfolio recommendations are made, and during meeting three, this Maryland wealth management firm will create strategies for asset protection and estate planning.

Finally, meeting four is a review and follow-up, which will continue annually throughout the duration of your financial planning relationship.

### **Investment Philosophy**

This top Maryland financial advisory firm uses a situation-based investment philosophy guided by the following principles:

- **Bottom-line orientation:** Advisors strive to minimize costs, including transaction fees, while creating strategies that consider tax implications.
- **Diversification:** The financial professionals at this top Maryland financial advisory firm create diversified plans based on both domestic and foreign stocks as well as bonds, cash, and other investments.
- **Independent thinking:** Rather than following the status quo or the example set by other advisors, this financial advisor in Washington D.C. bases investments on facts, valuations, and research.
- **Risk management:** These Maryland financial advisors create strategies based on profitability and long-term goals.

### **Rating Summary**

As a fee-only Maryland financial advisor, The Family Firm provides clients with the peace of mind that they will not encounter surprise or hidden charges during their financial planning relationship.

The firm is also extremely principle-based, using a strong ethical foundation for each of their financial services, further instilling trust within the client-advisor relationship.

With a talented team of financial professionals, a fee-only structure, and a wide range of financial services, The Family Firm is one of the best financial planners in D.C. and Maryland to consider partnering with this year.

---

## **Conclusion—Top 10 Financial Advisors in D.C., Maryland, and Virginia (Tri-State), US**

When looking at the top-rated financial advisors in the Washington D.C., Maryland, and Virginia area, there are several important factors.

Some of the most relevant considerations include whether or not the firm is independent and how it approaches investment, retirement, and general financial planning. Professional affiliations, advisor certifications, and general reputability are also important factors when evaluating D.C. financial advisors.

No matter whether you are looking for expert investment management, diverse financial planning capabilities, or a combination of the two, it's important to avoid rushing into a relationship with a financial planner in D.C., Maryland, or Virginia.

Take the time to use this guide as a starting point for choosing your preferred financial advisor in Virginia, Maryland, or D.C.

---

## Rate Table Disclaimer

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

---

Image sources:

- <https://www.bigstockphoto.com/image-1059488/stock-photo-financial-tools>
- <http://www.burtwealth.com/services/giving-back>
- <https://www.faiwealth.com/about>
- <http://www.fbbcapitalpartners.com/services/>
- <https://halpernfinancial.com/our-team>
- <http://harbourcapitaladvisors.com/>
- <http://kendallcapital.com/>
- <https://www.mcleanam.com/process/>