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# **Top 10 Best Financial Advisors in Franklin, Memphis, & Nashville, TN | 2018 Ranking**

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## **RANKING & REVIEWS BEST FINANCIAL ADVISORS IN NASHVILLE, FRANKLIN & MEMPHIS**

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### **2018 Ranking: Finding a Top Financial Advisor in Nashville, Franklin, and Memphis, Tennessee**

Nashville and Memphis are two cities in Tennessee that are rich with history and culture. No matter where you go, visiting either city is a marvelous opportunity to soak up the local food and music scene.

For those who are living and working in these well-known cities in Tennessee, finding a financial advisor in Nashville, Memphis, and the surrounding areas is a great way to grow their wealth and secure their future in the place they love.

Even those who have managed to acquire a significant amount of wealth may find themselves in for a nasty surprise if they do not organize their finances correctly. A Nashville wealth management firm or a financial advisor in Memphis can help professionals, business owners, and entrepreneurs get on the road to financial success and security.



*Award Emblem: Top 10 Best Financial Advisors in Memphis, Nashville, & Franklin, TN*

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## **Top 10 Best Financial Advisors in Nashville, Franklin, & Memphis, TN | Brief Comparison & Ranking**

<b>Financial Advisors in Nashville, Memphis, &amp; Franklin</b>	<b>Highlighted Features</b>	<b>Ratings</b>
CapWealth Advisors, LLC	Sophisticated Simplicity® approach	5
Family Wealth Management, LLC	Income tax planning and compliance	5
Kraft Asset Management, LLC	Holistic approach to wealth management	5
Legacy Wealth Management	Comprehensive financial planning and specialty services for FedEx pilots	5
Reliant Investment Management, LLC	Discretionary portfolio management	5

Summit Asset Management	Comprehensive financial planning	5
Waddell & Associates, LLC	Value-based investment compass	5
Woodmont Investment Counsel, LLC	Experienced investment team	5
Abound Wealth	Simple & smart wealth management	3
Silverleaf Capital Partners, LLC	Talented advisory team	3

*Table: Top 10 Best Financial Advisors in Memphis, Nashville, & Franklin | Above list is sorted by rating*

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## **Fee-Only vs. Fee-Based Nashville Financial Planners**

When it comes to evaluating financial advisors in Nashville, Memphis, or Franklin, there are typically two types of firms to consider: fee-only and fee-based advisors.

How do you know which type of Nashville wealth management firm is right for you?

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

### **Fee-Only**

When an investment firm or a financial advisor in Nashville says that they are "fee-only," this means that they *do not* accept commissions or third-party referral payments.

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

In short, a fee-only Nashville financial planner is in a better position to act solely in the interest of their clients.

### **Fee-Based**

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

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

Nashville and Memphis financial advisors that adopt a fiduciary commitment are legally responsible to fully disclose any conflicts of interest and are required to put the interests of their clients ahead of their own.



*Best Financial Advisors in Nashville, TN*

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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 Nashville & Memphis, TN**

Below, please find the detailed review of each firm on our list of the best financial advisors in Nashville, Memphis, and Franklin. We have highlighted some of the factors that allowed these 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.

- [Abound Wealth](#)
- [CapWealth Advisors, LLC](#)
- [Family Wealth Management, LLC](#)
- [Kraft Asset Management, LLC](#)
- [Legacy Wealth Management](#)
- [Reliant Investment Management, LLC](#)
- [Silverleaf Capital Partners, LLC](#)
- [Summit Asset Management](#)
- [Waddell & Associates, LLC](#)
- [Woodmont Investment Counsel, LLC](#)

Click below for previous years' rankings:

- **2016 Review:** [Top 9 Financial Advisors in Nashville & Memphis](#)
- **2017 Review:** [Best 9 Financial Planners in Nashville & Memphis](#)

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## Abound Wealth Review

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[Abound Wealth](#) is a [fee-only](#) financial advisor in Franklin, TN, located right outside of Nashville. This Nashville area wealth management firm offers wealth planning services that keeps things "smart and simple."

They emphasize low cost, low taxes, and longevity when dishing out financial planning advice. Built on a basis of stewardship and family, these Franklin financial advisors take the time to identify what is important to their clients so that they can diligently work towards accomplishing their goals.

### **Key Factors That Enabled Abound Wealth to Rank as a Top Financial Advisor in Franklin, TN**

#### **Fee-Only Wealth Management Firm**

People don't mind paying top dollar for top advice. What they do mind is paying top dollar for someone to sell them a product that does not work in their best interests. This is one of the pitfalls of the financial advisory industry.

How do you know whether or not a professional is promoting a product simply because they receive a commission?

This is why it helps to work with a fee-only financial advisor in Franklin, TN. In this case, the firm only receives compensation via the fee you pay them, and that fee is usually a percentage of the assets they manage for you.

This means that their success is directly tied to your success. The better their advice, the more likely you are to come back, and the more returns they help you realize the higher the value of the assets they charge a percentage on.

Additionally, as a fee-only firm, clients can count on unbiased, objective advice from the Franklin financial advisors at Abound Wealth.

### **Simple and Smart Wealth Management**

This wealth management firm in the Nashville area provides what it calls simple and smart financial advice. Their mission is to provide a safe haven for people looking for intelligent, no nonsense wealth management that is free from sales pitches and quotas.

Their Nashville-area financial advisors work for clients, not outside interests that are developing financial products for sale. They believe in acting as a "personal CFO" for clients by helping them manage every area of their financial lives.

As a top Nashville wealth management firm, Abound Wealth provides unique plans that are specifically tailored to the needs of their clients as opposed to trying to squeeze individuals into cookie cutter solutions. Additionally, they are diligent about keeping costs and taxes low.

What more, this firm will work with clients either locally or virtually, bringing their financial advice to wherever they are whether it's in Nashville, Memphis, or on the other side of the country.



*Best Financial Advisors in Nashville, Memphis, & Franklin*

**Rating Summary**

With a fee-only structure and a client-centric commitment, Abound Wealth provides clients with the utmost in transparency and trust, providing a strong foundation for a long-term financial planning relationship.

Although Abound Wealth is certainly a top financial advisor in Franklin, TN, our review did find an opportunity for improvement with how the firm's financial planning services are communicated.

Without a clear description of what types of financial planning or investment management services are available, potential clients may find it difficult to fully evaluate the firm.

By including detailed descriptions of the types of services offered, Abound Wealth could easily improve both their value proposition to clients and their rating as a top financial advisor in Franklin, TN.

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

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## CapWealth Advisors, LLC Review

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[CapWealth Advisors, LLC](#) is a wealth advisory and financial planning firm located south of Nashville in Franklin, Tennessee. It offers a variety of services to individuals, families, institutions, and foundations, including portfolio management, retirement planning, and tax consultation.

CapWealth is a [fee-based](#) financial advisor in Franklin, TN, and we have included them on this list for their independence and wide range of services they provide.

### **Key Factors That Enabled CapWealth Advisors, LLC to Rank as One of the Top Franklin Financial Advisors**

#### **Sophisticated Simplicity® Approach**

CapWealth's Investment Committee oversees all asset management research. Through expert analysis, this financial advisor in Franklin, TN has created its own [Sophisticated Simplicity®](#) model which incorporates macro-economic data and analysis into a wide range of exotic, alternative, and private investment landscapes.

Independent discovery allows CapWealth to be a catalyst for:

- Change in competitive position
- Corporate restructuring
- Potential for earnings
- Hidden or unrealized value
- A theme-driven nature
- Exceptional management
- New product development and technology advancement

#### **Lifestyle & Wealth Management**

Proactive investment management isn't just about stocks. As clients face inevitable changes through each stage of life, their needs change as well.

CapWealth understands this and will be there to help through life's transitions. The following situations may require extra support from these financial advisors in Franklin, TN:

- Divorce
- Marriage
- Estate planning



- Retirement planning
- Death in the family
- College planning
- Job change
- Disability and health planning
- Birth of a child or adoption
- Major inheritance

## **Breakdown of Services**

Here, we will take a brief look at the variety of services offered through CapWealth. Each group of services is backed by the knowledge and expertise of the firm and its team of financial advisors in Franklin, TN:

- Tax Planning: This wealth management firm in the Nashville area provides integrated tax planning and income tax design.
- Family Wealth Planning: This firm helps preserve intergenerational wealth, educate the younger generation on good stewardship, and fosters collaboration within the current generations.
- Investment Services: As you enter CapWealth's vast world of investments, you'll have the opportunity to work with your advisor to establish investment objectives, rebalance your portfolio, coordinate with other professionals, plan for insurance, and more.
- Retirement Income & Distribution Planning: It's never too early to plan for your retirement. A retirement plan through CapWealth covers all aspects of retirement, including an analysis of your current and future situation, ongoing reviews of IRA beneficiaries, tax planning and asset management, and more.
- Client Services & Communication: Good communication is essential to financial success. Not only will you have access to cutting-edge information on the market, economics, and laws, you will also have the option to be included in seminars on tax planning, estate planning, and other financial topics.

## **Rating Summary**

As one of the top financial advisors in Franklin, TN, CapWealth Advisors provides clients with a dynamic, comprehensive, and transparent approach to improving their financial health.

Uniquely, the firm also provides financial strategies and tools for Millennials, encouraging good money management habits early on and solidifying CapWealth Advisors as a top financial advisor in Franklin, TN to consider partnering with this year.

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## Family Wealth Management, LLC Review

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Founded in 1998, [Family Wealth Management](#) is a Nashville wealth management firm that serves individuals, families, and non-profit organizations.

Today, Family Wealth Management is a boutique-sized, independent, and [fee-only](#) financial advisor in Nashville, Tennessee, offering a full suite of portfolio management, financial planning, and retirement planning services.

### **Key Factors That Enabled Family Wealth Management, LLC to Rank as a Top Financial Advisor in Nashville**

#### **Solid Philosophy**

In all it does, Family Wealth centers itself around a set of simple yet important driving philosophies which it incorporates into all its business practices. These philosophies are based on this Nashville wealth management firm's commitment to being:

- Independent: You never need to worry that your success is being compromised due to a conflict of interest.
- Integrated: Total wealth management through a comprehensive, expertly curated approach.
- Team-Based: A richly diverse team with longstanding ties to the firm and its community.

#### **Custom Tailored Experience**

Each service offered by Family Wealth Management is meant to provide a customized experience.

The needs of each and every client coming through the door of this financial advisor in Nashville vary and, as such, the firm recognizes the need for a unique approach.

These financial advisors in Nashville utilize multi-disciplinary tools and a comprehensive review process to customize some of the following services:

- Portfolio management
- Income tax planning and compliance
- Wealth succession planning
- Family philanthropy

- Risk management
- Accounting and record keeping
- Ancillary management services



*Family Wealth Management - Nashville, TN*

## **Rating Summary**

While Family Wealth Management may be one of the smaller Nashville financial advisors on our list, this boutique structure allows for individualized attention, facilitating long-term relationships and customized financial solutions.

With a boutique approach, a wide range of financial services, and a fee-only commitment, Family Wealth Management is one of the best financial advisors in Nashville to consider partnering with this year.

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

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## **Kraft Asset Management, LLC Review**

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As a wholly owned subsidiary of KraftCPAs PLLC, [Kraft Asset Management, LLC](#) (KAM) was formed in 2002 in response to an ever-growing need for wealth management services.

It is not clear as to whether this Nashville wealth management firm uses a fee-only or fee-based structure. As always, we recommend verifying compensation structures before partnering with any Nashville financial advisor.

## **Key Factors That Enabled Kraft Asset Management, LLC to Rank as One of the Top Financial Advisors in Nashville, TN**

### **Holistic Approach to Wealth Management**

As a top financial advisor in Nashville, KAM acknowledges that establishing good financial health often involves a variety of factors. For the Nashville financial advisors at KAM, this means helping clients with multiple endeavors, including:

- Building Wealth
- Preserving Wealth
- Transferring Wealth
- Donating Wealth

To that end, the Nashville financial advisors at KAM can assist with the following wealth management challenges:

- Investment Management
- Income Tax Planning
- Estate Planning
- Cash Flow Management
- Re-Balancing
- Retirement Planning
- Risk Management

### **Talented Advisory Team**

The team of financial advisors at KAM bring decades of experience in the financial industry, including professional designations such as:

- CPA—Certified Public Accountant
- CFP®—Certified Financial Planner
- PFS—Personal Financial Specialist
- CEPA—Certified Exit Planning Advisor
- Series 65 license
- Series 66 license
- Series 7 license

Many of these designations come with strict requirements for fiduciary responsibilities and ongoing education, solidifying the industry knowledge brought by these Nashville financial advisors.

### **Rating Summary**

As a top Nashville financial planner, Kraft Asset Management provides clients with a solid industry foundation, backed by one of the largest independent certified public accounting firms in Tennessee.

With a strong list of industry affiliations, a talented team, and a wide range of financial capabilities, KAM is one of the best financial advisors in Nashville, TN to consider partnering with this year.

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## **Legacy Wealth Management Review**

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Located in Memphis, Tennessee, [Legacy Wealth Management](#) combines unparalleled financial planning services along with expertly led portfolio management for clients all over the United States.

Founded in 1982, Legacy Wealth is a [fee-only](#) financial advisor in Memphis.

### **Key Factors That Enabled Legacy Wealth to Rank as a Top Financial Advisor in Memphis**

#### **Comprehensive Financial Planning**

For many clients, part of finding the best financial advisors in Memphis is finding a firm that provides a diverse range of services.

Financial goals and needs are subject to fluctuate over time, and to meet the varying needs of their clients, Legacy Wealth provides the following financial planning services:

- Identification of life goals
- Retirement and income planning
- Estate planning
- Gift planning
- Trust services
- Tax planning
- Entrepreneur advisory services
- Stock option planning
- Charitable planning

- Insurance planning
- Education planning

### **Specialty Services for FedEx Pilots**

Financial planning can be a complex matter, especially for clients working within a particular field. The Memphis financial planners at Legacy Wealth can provide specialized financial planning for FedEx pilots, which includes:

- Pre-retirement and post-retirement planning
- Explanation of A-plan retirement benefit options
- PRSP retirement account management

This specialization in assisting FedEx pilots sets Legacy Wealth apart from competing Memphis financial planners, providing unique expertise to help FedEx pilots navigate through their often-complicated benefits and contracts.

Additionally, the firm holds monthly group or individual presentations to help FedEx pilots better understand their corporate retirement packages, supporting financial literacy and better money decisions.

### **Portfolio Management**

An appropriately managed investment portfolio contains inner workings which are closely tied to your financial plan. By identifying your investment objectives and creating a clear plan to develop those objectives into tangible success, Legacy Wealth is able to offer:

- Institutional quality investments
- Rigorous investment selection
- Asset allocation strategies
- Tax-efficient portfolio construction
- Monitoring and reporting



### *Legacy Wealth Management*

#### **Rating Summary**

Legacy Wealth proudly serves as an employee-owned, SEC-registered, independent financial advisor in Memphis.

As such, these Memphis financial advisors offer commission-free services on a fee-only basis, meaning you know your costs up front, and there is never a hidden fee or agenda.

With transparency at the forefront, a comprehensive range of services, and a unique specialty in assisting FedEx pilots, Legacy Wealth is one of the best financial advisors in Memphis to consider partnering with this year.

***Related: Top Financial Advisors in Toronto, Canada***

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## **Reliant Investment Management, LLC Review**

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With offices in Memphis, Tennessee and Shreveport, Louisiana, [Reliant Investment Management, LLC](#) offers portfolio management and advisory services to both individual and institutional clients.

As a top Memphis financial advisor, Reliant Investment Management stands out for their independence and experience in serving public, institutional, and private clients.

It is unclear as to whether Reliant uses a fee-only or fee-based structure, though they are [likely fee-only](#) as they do not accept commissions. As always, we recommend verifying

compensation before partnering with Nashville, Franklin, or Memphis financial planners.

## **Key Factors That Enabled Reliant Investment Management, LLC to Rank as a Top Memphis Financial Advisor**

### **Experienced & Independent Team**

The team at Reliant boasts over 125 years of combined experience in conservative yet expert portfolio management. Principals of this Memphis wealth management firm also hold several community affiliations, whether it pertains to public speaking or holding seats on a variety of committees.

Reliant is owned and managed by its founding principals and remains unaffiliated with any other brokerage firms or financial institutions.

Furthermore, this Memphis financial advisor is an SEC-regulated RIA (Registered Investment Advisor). It prides itself on providing commission-free services on a fee-only basis.

### **Services for Clients**

As a top Memphis financial advisor, Reliant caters to an impressive range of clients, serving custom-tailored investment management strategies for those in the public, institutional, and private sectors. Some examples of clients served within these groups include:

#### Public Clients

- Development authorities
- Local municipal governments
- Special districts
- Housing authorities
- Development authorities
- School districts
- County/parish governments
- Transit authorities

#### Institutional Clients

- Educational institutions
- Health care entities
- Corporations
- Trusts, foundations, and endowments
- Banks and depositories
- Non-profit and religious entities



## Private Clients

- Investment consultants
- Individual and family clients
- Trusts/estates/foundations
- Retirement assets and retirement plans
- Other financial advisors
- Donor-advised funds

## **Rating Summary**

For private, public, or institutional clients seeking expert investment management services, Reliant Investment Management is a great fit.

Although the team of Memphis financial advisors may be smaller than that of competing firms, this allows for personalized attention that often cannot be matched by larger firms, providing an advantage for clients that want to establish a long-term relationship with their advisor.

With a wide range of clients served and a strong focus on providing effective portfolio management, Reliant Investment Management is a top Memphis financial advisor to consider partnering with this year.

***Popular Article: Best Financial Advisors in Oklahoma City & Tulsa, Oklahoma***

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## **Silverleaf Capital Partners, LLC Review**

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[Silverleaf Capital Partners, LLC](#) is a [fee-only](#) boutique investment management and financial planning firm in Memphis.

With a low client-to-advisor ratio, Silverleaf can provide their clients with dedicated personal services and over 60 years of combined experience in the financial industry.

**Key Factors That Enabled Silverleaf Capital Partners, LLC to Rank as a Top Memphis Financial Advisor**

### **Family Office Approach**

Silverleaf Capital has created a partnership with Fidelity Family Office Services. This partnership allows the firm to offer comprehensive financial planning services and

access to this Memphis wealth management firm's infrastructure, giving clients total control and visibility of their wealth.

Additionally, Silverleaf is experienced in the integration and coordination of a family's widely deployed assets and will work with your financial custodians (CPAs, attorneys, and brokers) to consolidate your holdings and information for optimal performance.

### **Talented Advisory Team**

Although the team at Silverleaf Capital Partners may be smaller than that of competing Memphis financial advisors, the advisors on staff bring decades of experience and expertise to the table. Certifications include:

- CIMA®—Certified Investment Management Analyst
- CFA®—Chartered Financial Analyst
- CFP®—Certified Financial Planner
- Series 66 securities license
- Series 65 securities license

These designations come with strict requirements for fiduciary responsibilities and ongoing industry education, ensuring that clients receive advice that is both up-to-date and unbiased.



*Silverleaf Capital Partners, LLC*

## Rating Summary

As an independent, fee-only firm with a fiduciary commitment, Silverleaf Capital Partners provides clients with a strong foundation of trust and transparency, two key elements in any successful financial planning relationship.

In comparison to competing Nashville and Memphis advisors, however, Silverleaf does have an opportunity for improvement when it comes to how their services are communicated. For example, without an in-depth look at their investment philosophy or portfolio designs, it may be difficult for new clients to fully evaluate their capabilities.

By adding more details to their financial services, Silverleaf Capital Partners can easily improve both their value proposition to new clients and their rating as a top Memphis financial advisor.

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## Summit Asset Management Review

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Founded in 1991, [Summit Asset Management](#) is an investment management and financial advisor in Memphis, Tennessee.

As a [fee-only](#) Memphis financial advisor, Summit Asset Management serves individuals, families, trusts, retirement plans, and charitable endowments.

### **Key Factors That Enabled Summit Asset Management to Rank as a Top Financial Advisor in Memphis**

#### **Investment Management at a Glance**

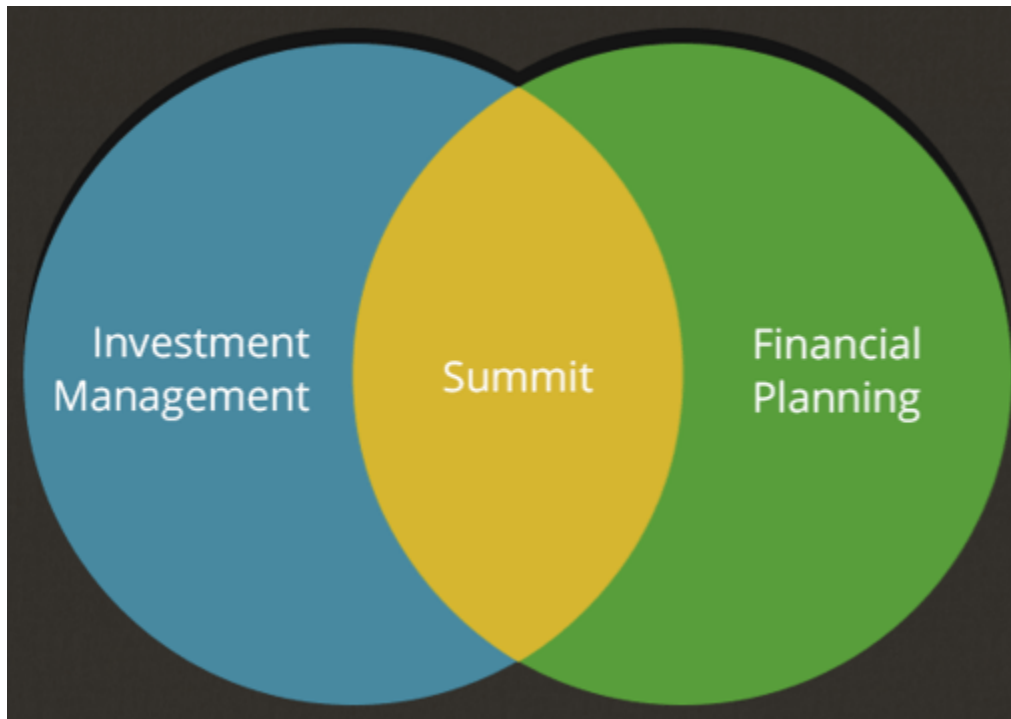
Investment portfolios are created based on a client's current financial situation and their future goals. Summit then utilizes a team-driven approach with an investment committee dedicated to complete oversight and adherence to company disciplines.

After a completed portfolio is set into action, the investment committee monitors performance continuously and advises on changes when necessary. Each portfolio takes the following factors into account:

- Time horizons
- Taxes
- Risk tolerances
- Income
- Life goals

Furthermore, the following is a look at Summit's most often utilized asset classes:

- Individual securities (stocks, bonds, and CDs)
- Mutual funds
- Alternative hedge funds
- Private partnership options
- Exchange-traded funds (ETFs)



*Summit Asset Management*

### **Comprehensive Financial Planning**

Creating a client-specific financial plan takes a lot of insight and dedication on the part of your financial advisor.

Through a team-centered approach, these Memphis financial advisors work together with the client to create a long-term plan for the family, business or non-profit sector. Typical areas of planning include:

- Education
- Insurance
- Retirement
- Family partnerships
- Business succession
- Tax issues
- Estate and trust

- Charitable giving

### **Rating Summary**

As a 100 percent employee-owned firm, Summit Asset Management faces no pressures from outside entities to sell products or offer advice solely based on garnering a commission from the sale.

As such, the sole driving factor during all stages of planning and implementation is the success of the client, instilling trust and transparency within the client-advisor relationship.

With a wide range of financial services, a well-accredited team, and a fee-only structure, Summit Asset Management is one of the best Memphis financial advisors to consider partnering with this year.

***Read More: Best Financial Advisors in Austin, TX (RIAs, Wealth Managers, Planners)***

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## **Waddell & Associates, LLC Review**

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[Waddell & Associates, LLC](#) (W&A) is a firm with offices located in both Memphis and Nashville, Tennessee. Through these offices, it offers complete investment management and financial planning services to both institutional and individual clients.

As a [fee-only](#) financial advisor in Nashville, Waddell & Associates does not accept commissions or make money on investment transactions, ensuring the clients receive an unbiased perspective.

### **Key Factors That Enabled Waddell & Associates, LLC to Rank as a Top Financial Advisor in Nashville**

#### **The Investment Compass**

This Nashville wealth management firm refers to its investment philosophy as its "compass." While it provides guidance during difficult times, this principle-driven compass is also helpful during stable times, as it makes sure the firm does not slowly drift in a bad direction.

This financial advisor in Nashville and Memphis has stayed true to the following investment principles for over twenty years:

- Simplicity
- Owning what its clients own
- Prioritizing liquidity
- Seeking transparency
- Balancing asset management with risk management

### **Dedicated Client Services**

To offer a comprehensive suite of services to individual clients, W&A offers flexibility within the following services:

- Estate planning
- Asset management
- Executive benefit planning
- Charitable planning
- Retirement planning
- Concentrated stock positioning
- Education planning
- Tax strategy planning
- Insurance analysis
- Business succession planning
- Employee benefit planning

Additionally, W&A utilizes the following investment vehicles to diversify and safeguard each client's investment portfolio:

- Individual securities
- No-load mutual funds
- Municipal bonds
- Exchange-traded funds (ETFs)
- Money market funds and CDs
- Corporate bonds
- US treasury bonds

### **Rating Summary**

As an RIA (Registered Investment Advisor), Waddell & Associates is bound by its fiduciary duty to always put the best interests of its clients first.

Additionally, their independence supports a strong commitment to unbiased, conflict-free advice, instilling trust within the client-advisor relationship.

With a wide range of services, a strong commitment to client communication, and a fee-only structure, W&A is one of the best financial advisors in Nashville to consider partnering with this year.

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## Woodmont Investment Counsel, LLC Review

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[Woodmont Investment Counsel, LLC](#) is a [fee-based](#) Nashville wealth management firm that serves high-net-worth individuals, families, institutions, endowments, foundations, and trusts.

Founded in 2000, Woodmont Investment is an independent RIA (Registered Investment Advisor) and has built upon its success year after year.

### **Key Factors That Enabled Woodmont Investment Counsel, LLC to Rank as One of the Best Wealth Management Firms in Nashville**

#### **An Experienced Investment Team**

Woodmont Investment prides itself on having a diverse team with a multitude of qualifications and real-world experience.

The team's backgrounds vary from those in the investment management industry, hedge fund expertise, and self-side investment banking to global fixed-income investment management, Wall Street brokerage firms, and various asset management firms.

Along with career experience, the team of Nashville financial advisors at Woodmont also bring professional certifications and designations, which include:

- CFA®—Chartered Financial Analyst
- CIC—Chartered Investment Counselor
- CAIA—Chartered Alternative Investment Advisor

As you can see, the breadth of experience brought by these Nashville financial advisors is vast, which is certainly something that all types of clients can benefit from.

#### **Tailored Approach to Client Services**

The first step in any plan is getting to know the unique needs of the client and assessing their current financial situation. Next, the firm presents the client with a specific investment strategy and asset allocation plan.

Each portfolio usually consists of a unique blend of equities, fixed-income, and, when called for, alternative investments. Portfolios are monitored regularly, and clients always remain well-informed about the activity of their investments. Clients of this Nashville wealth management firm can rely on:

- Holistic Wealth Management
- Sophisticated Investment Management
- Consulting and Advisory Services

As one of the top wealth management firms in Nashville, Woodmont Investment Counsel serves individuals, families, business owners, and institutions.



*Best Wealth Management Firms in Nashville, TN*

### **Rating Summary**

As a boutique Nashville wealth management firm, Woodmont Investment Counsel provides clients with attentive service and individualized attention that many larger firms simply cannot match.

For clients that are partnering with a Nashville financial advisor for the first time—or for those that prefer to establish long-term relationships with a wealth management firm—this boutique structure is a clear advantage.

With a fiduciary commitment and a talented team, Woodmont Investment Counsel is one of the best wealth management firms in Nashville to consider partnering with this year.

***Related: Top Financial Advisors in Portland, Oregon***



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## **Conclusion – Best Financial Advisors in Nashville, Franklin, and Memphis, Tennessee**

Protecting your wealth requires the same kind of diligence and care it took to accumulate it. Taking the time to look up financial advisors in Memphis and Tennessee is a small investment today that can pay huge dividends in the future.

Our reviews are meant to serve as a starting point so that you do not have to spend hours skimming search engine results.

By cross-referencing the information in this review with the list of features you're looking for in a financial advisor in Memphis, Franklin, or Nashville, you'll be well on your way to finding the perfect financial advisor in no time.

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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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