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# **Top 10 Best Financial Advisors in Phoenix & Scottsdale, AZ | 2018 Ranking**

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## **RANKING & REVIEWS BEST FINANCIAL ADVISORS IN PHOENIX & SCOTTSDALE**

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### **2018 Ranking: The Top Advisors and Financial Planners in Phoenix & Scottsdale, Arizona**

Whether you have already entered retirement or are just starting out on the retirement journey, having a great wealth manager or financial planner by your side can be the difference between financial success and financial hardship.

Of course, the challenge is separating the mediocre wealth management firms from the truly exceptional financial advisors in Scottsdale and Phoenix.

The sheer number of financial advisors in Phoenix and Scottsdale makes choosing just one a difficult task. However, by developing a clear idea of the financial services you need and doing proper research, the answers to finding the best wealth management in Phoenix or Scottsdale will soon become clear.

While the final decision rests in your hands, we have compiled a list of the top financial advisors in Phoenix and Scottsdale, Arizona, to give you a head start on your way to financial success.



*Award Emblem: Top 10 Best Financial Advisors in Phoenix & Scottsdale, AZ*

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## **Top 10 Best Financial Advisors in Phoenix and Scottsdale, Arizona | Brief Comparison & Ranking**

<b>Best Financial Advisors in Phoenix &amp; Scottsdale</b>	<b>Highlighted Features</b>	<b>Ratings</b>
Alpha Fiduciary	Integrated wealth management services	5
Intelligent Capitalworks	Fee-only services with a fiduciary commitment	5
LifeTyme Financial, LLC	Wide range of financial services for everyday consumers	5
MRA Associates	Defined wealth management process	5
Perspective Financial Services	6 Key Elements to Financial Planning	5
Ronald Blue & Co.	Faith-based financial planning	5
Sensible Money	Juicing® & Juicing® Plus	5

TCI Wealth Advisors	APSIRE program for young professionals	5
Versant Capital Management	Redefined client services for high-net-worth clients and their families	5
Silverhawk Wealth Management	Proprietary systems for high-net-worth wealth management	3

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

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## Identifying the Top Financial Advisors in Phoenix & Scottsdale, AZ

When one makes the decision to hire a financial advisor in Phoenix or Scottsdale, several questions come to mind:

- Is there a difference between a Phoenix financial advisor versus a Phoenix wealth manager?
- What criteria should I consider when choosing the right financial advisor in Phoenix for me?
- What services are typical, and which are extra?

Undoubtedly, you'll wonder what a Phoenix or Scottsdale financial advisor charges and what the total monetary value of your assets is.

These questions are great starting points for identifying the top financial advisors in Phoenix and Scottsdale. If there is one thing that you should do when searching for the perfect financial planner, it's to ask questions.

The more you know about the details involved in wealth management, the better equipped you will be to make educated decisions.

You've worked hard to earn the money you have, and the top Scottsdale or Phoenix financial planners will help you secure a happy and comfortable financial future.

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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 Phoenix & Scottsdale

Below, please find the detailed review of each firm on our list of the best wealth management firms in Phoenix and Scottsdale. We have highlighted some of the factors that allowed these financial advisors in the Phoenix area 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.

- [Alpha Fiduciary](#)
- [Intelligent Capitalworks](#)
- [LifeTyme Financial, LLC](#)
- [MRA Associates](#)
- [Perspective Financial Services](#)
- [Ronald Blue & Co.](#)
- [Sensible Money](#)
- [Silverhawk Wealth Management](#)
- [TCI Wealth Advisors](#)
- [Versant Capital Management, Inc.](#)

Click below for previous years’ rankings:

- **2016 Review:** [Top 11 Best Financial Advisors in Phoenix & Scottsdale](#)
- **2017 Review:** [Top 11 Best Financial Advisors in Phoenix & Scottsdale](#)

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### Alpha Fiduciary Review

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As a top financial planner in Phoenix, [Alpha Fiduciary](#) maintains a strong focus on providing fee-only services with a fiduciary approach.

This Phoenix wealth management firm provides investment guidance based on each client’s financial goals and needs, instead of commission structures or third-party selling agreements.

Decades of combined experience and a commitment to keeping up with the ever-changing global markets make Alpha Fiduciary a top choice when it comes to registered investment advisory firms in Phoenix.

## **Key Factors That Enabled Alpha Fiduciary to Rank as a Top Phoenix Wealth Management Firm**

### **Integrated Wealth Management**

Alpha Fiduciary believes that wealth management encompasses a spectrum of financial services.

As a result, this top wealth management firm in Phoenix helps its clients navigate the different stages of their financial lives with integrated services that emphasize support:

- **Investment Consulting** – Alpha uses its discovery process to form a clear picture of the client’s current resources and future goals. It then builds a portfolio based on each client’s unique situation, tax needs, and risk appetite.
- **Advanced Planning** – This Phoenix financial advisory firm considers each client an individual with distinct needs, desires, and challenges. It is committed to helping its clients navigate their specific situations through research and experienced-based planning.
- **Relationship Management** – Alpha Fiduciary understands that communication is key to any long-term relationship. Their team of Phoenix financial advisors seek to be readily available at all times.

### **Experienced Estate Planning**

When it comes to estate planning, Alpha Fiduciary is dedicated to helping families and heirs prepare for the effects of wealth transfer.

This Phoenix wealth management firm believes that tax efficiency is only one facet to successful estate transfers. Family dynamics play a large role as well and should be addressed as part of the planning process.

As a result, ensuring that heirs are prepared to properly handle a transfer of wealth is a key component of Alpha Fiduciary’s estate planning services, ultimately supporting a positive, long-term environment for heirs to successfully manage their wealth.

This holistic view makes Alpha an attractive choice for anyone who may one day be faced with the complexities of estate transfer.



### *Best Phoenix Wealth Management Firms*

#### **Rating Summary**

As a fee-only firm with a fiduciary commitment, Alpha Fiduciary represents the ideal partnership with a Phoenix financial advisor.

Not only can clients trust that the financial advice they receive is wholly unbiased, but they can also benefit from comprehensive wealth management services, making Alpha Fiduciary one of the best financial advisors in Phoenix to consider partnering with this year.

***See Also: [Top Financial Advisors and Best Wealth Managers in the US & UK | Top Ranking Lists](#)***

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## **Intelligent Capitalworks Review**

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Founded in 2005, [Intelligent Capitalworks](#) is an independent, [fee-only](#) firm offering financial planning and wealth management in Scottsdale.

The firm prides itself on providing client-centric, customized solutions for a variety of financial planning and wealth management needs, all from a fiduciary perspective.

## **Key Factors That Enabled Intelligent Capitalworks to Rank as a Top Scottsdale Financial Advisor**

### **Client-Centric Mission**

A good way to identify the best Scottsdale financial advisor for your needs is to look at the firm's mission statement and see if their values match yours.

In the case of Intelligent Capitalworks, all services for wealth management in Scottsdale are offered from a solid foundation of values. The firm seeks to:

- **Foster** your ability to make smart financial choices by planning, saving, investing, and protecting your wealth
- **Commit** their creativity and leadership to collaborate with you, providing expert financial experience, professional certifications, and critical thinking
- **Create** value by using disciplined wealth management and financial planning to help you meet your goals
- **Dedicate** resources to managing your finances each day, ensuring that goals are accomplished

### **Comprehensive Services**

As one of the top Scottsdale financial planners, Intelligent Capitalworks provides clients with three branches of comprehensive services, detailed below.

- **Investment Management**—Builds a diversified portfolio of long-term investments to help clients reach lifelong financial goals, like planned income, cash needs, and asset growth
- **Retirement Planning**—Empowers clients to become their own personal CEOs and sustain their wealth in retirement, whether they are just beginning the process or already retired
- **Financial Life Management**—Addresses issues that arise from growing wealth, like planning your estate, managing risk, and devising effective philanthropic goals



### *Best Scottsdale Financial Advisors*

#### **Rating Summary**

For high-net-worth clients that want a personalized, dedicated Scottsdale financial advisor to help them improve their financial health, Intelligent Capitalworks is a great fit.

Although the firm has a smaller team than competing Phoenix and Scottsdale financial advisors, this allows Intelligent Capitalworks to take a boutique approach, providing personalized attention and a client-centric focus.

With a fee-only approach, an emphasis on long-term strategies, and a dedication to positive client-advisor relationships, Intelligent Capitalworks is one of the best Scottsdale financial planners to partner with this year.

***Don't Miss: Top Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee***

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## **LifeTyme Financial Review**

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An independent firm based in Phoenix, [LifeTyme Financial, LLC](#) works with individuals, families, and small business owners to help them realize their financial goals.

LifeTyme Financial, LLC is a [fee-based](#) financial advisor in Phoenix, but we have included them on our list for their fiduciary commitment and wide range of services they provide.

## **Key Factors That Enabled LifeTyme Financial to Rank as a Top Phoenix Wealth Management Firm**

### **Wide Range of Services**

The wide range of services offered by this financial planner in Phoenix centers around the everyday needs that every financially responsible person faces:

- **Asset Management**—LifeTyme will create an investment portfolio based on the client's goals and risk tolerance.
- **Life and Long-Term Care Insurance**—These Phoenix financial advisors believe that proper coverage is essential to a healthy financial strategy.
- **Retirement/Supplemental Programs**—Whether the goal is to build a consistent income or to manage assets, LifeTyme can help clients get there.
- **College Funding Plans**—Clients can start saving as early as possible through 529 College Savings Plans and more.
- **Elder Care Protection**—These Phoenix financial advisors are well-versed in various elder care funding and insurance options.
- **Estate Planning Strategies**—LifeTyme understands the importance of preserving assets during transfer and beyond through effective tax strategies.
- **Tax Planning Strategies**—Implementing smart tax strategies throughout the year is key to a successful tax season, and these financial planners in Phoenix can either partner with an existing CPA or help clients locate the best tax professional for their needs.

### **Experience with Corporate Solutions**

In addition to working with individuals and families, this Phoenix wealth management firm offers a suite of [corporate solutions](#), including executive compensation programs such as deferred compensation, executive bonuses, split dollar, Section 79, and fully insured 412(e)(3)s.

Other business-related services offered by these Phoenix financial advisors include tax planning strategies, business continuation programs, buy/sell strategies, and retirement plan solutions.

Their dual expertise with financial services geared toward businesses and individuals or families makes LifeTyme an ideal choice for small business owners who would like to have all their financial management needs cared for at a single location.

### **Rating Summary**

As a top Phoenix wealth management firm, LifeTyme Financial is committed to building partnerships with their clients for the long-run.

Its team of financial advisors holds over 40 years of combined experience in helping others achieve their lifestyle dreams through better investing, putting a high premium on client empowerment through financial education.

While a fee-based structure enables advisors to earn commissions through insurance products, their fiduciary commitment ensures that these Phoenix financial advisors will put the needs of their client first and foremost, earning LifeTyme Financial a spot as one of the best Phoenix wealth management firms.

### ***Related: Top Advisors and Wealth Managers in Ohio***

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## **MRA Associates Review**

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One of the top Phoenix financial planners, [MRA Associates](#) provides investment, wealth management, and tax compliance and consulting services to corporations, endowments, foundations, individuals, and families throughout the U.S.

Founded in 1991 as a [fee-only](#) Phoenix wealth management firm, MRA Associates is an independent fiduciary that offers widely sought financial advisory services.

### **Key Factors That Enabled MRA Associates to Rank as a Top Phoenix Wealth Management Firm**

#### **Defined Wealth Management Process**

MRA's defined wealth management process places client interests at the forefront and ensures that financial decisions are made only when all facts are at hand.

MRA aims to do the following through a proactive, comprehensive approach to financial management:

- Develop a holistic view of the client's overall financial picture
- Place the client's interests above all others
- Provide clients with a unique company structure that allows clients to work with a full team of experts
- Remain accessible to all clients throughout every step of the way

This emphasis on ongoing communication is particularly notable, as it supports partnership and trust within the client-advisor relationship, setting clients up for long-term success with Phoenix financial planning strategies.

### **Experience with Institutional Clients**

MRA has the experience and expertise to serve the specialized needs of institutional clients. This Phoenix wealth management firm's institutional services include:

- Discovery for objectives and goals
- Discretionary asset management
- Quarterly investment review meetings
- Monte Carlo modeling
- Manager search, selection, and retention
- Portfolio construction
- Sensitivity analysis
- Fiduciary education



*Best Financial Advisors in Phoenix, AZ*

**Rating Summary**

For individuals, families, and institutions, MRA Associates provides dynamic and comprehensive Phoenix financial planning services.

Not only can clients benefit from a range of capabilities, but they also benefit from an independent, fee-only structure, eliminating conflicts of interest and solidifying MRA Associates as one of the best financial advisors in Phoenix.

***Popular Article: Top Wealth Managers and Advisors in Florida***

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**Perspective Financial Services Review**

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An independent, [fee-only](#) Registered Investment Advisory firm in Phoenix, [Perspective Financial Services](#) provides established investment strategies and communication-based relationships for its clients.

This Phoenix wealth management firm's focus on research and strategy is designed to give clients a sense of control and peace of mind when it comes to their financial situations, despite turbulent economic times.

This dedication is what puts Perspective on this list of top financial planning and wealth management firms in Phoenix.

## **Key Factors That Enabled Perspective Financial Services to Rank as a Top Phoenix Wealth Management Firm**

### **6 Key Elements to Financial Planning**

Before partnering with a Phoenix wealth management firm, it's important to understand their approach to financial planning.

As a top financial advisor in Phoenix, Perspective Financial Services provides a clear and comprehensive explanation of their approach, defined by the 6 Key Elements to Financial Planning:

- **Structure**—Customized services and online tools help keep all aspects of your financial life organized and structured
- **Progress**—Periodic reviews and consistent encouragement help keep financial goals on track
- **Objectivity**—Involves transparency, full disclosure, and research-driven strategies to eliminate emotional decisions
- **Proactivity**—Phoenix financial planning services are designed with flexibility in mind to ensure long-term success
- **Insight**—These financial advisors in Phoenix go the extra mile to understand each client's unique background, philosophy, needs, objectives, and concerns
- **Collaboration**—The firm strives to create long-term relationships, working collaboratively to lay a foundation of mutual respect

### **Online Tools**

In this technological age, easy access to services through the Internet has become an important factor in client satisfaction.

Perspective's easy-to-use [online portal](#) allows clients to communicate with this wealth management firm in Phoenix, gauge their financial progress, and view investments and actions with a few clicks.

The portal includes a secure document vault, portfolio reporting, and personal financial planning tools which provide convenient and on-the-go access to clients' financial plans, reports, and goals online.

### **Rating Summary**

For clients that want a personalized approach to Phoenix financial planning that is truly customized to their unique needs, Perspective Financial Services is a great fit.

The firm's focus on collaboration and individualized attention can provide clients with significant planning advantages, making Perspective Financial Services one of the best financial advisors in Phoenix to consider partnering with this year.

***Read More: Best Financial Advisors in San Diego, California***

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## **Ronald Blue Trust Review**

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[Ronald Blue Trust](#) is a [fee-only](#) firm offering wealth management in Phoenix, Arizona. The firm currently has over \$8 billion in assets under management, and serves over 7,000 clients across the country.

Uniquely, these Phoenix financial advisors specialize in providing faith-based financial advice and planning, helping clients grow and preserve their wealth in a manner that is in line with biblical principles.

### **Key Factors That Enabled Ronald Blue Trust to Rank as a Top Phoenix Wealth Management Firm**

#### **Client Divisions**

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

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

- **Everyday Steward®**—Financial planning strategies for those just getting started

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

### **Faith-Based Approach**

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

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

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



*Top Phoenix Wealth Management Firms*

## **Rating Summary**

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

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

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

***Related: Best Financial Advisors in Lexington & Louisville, Kentucky | Ranking | Kentucky Wealth Management Firms***

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## **Sensible Money Review**

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As a [fee-only](#) Scottsdale financial advisor, [Sensible Money](#) takes enormous pride in its ability to take complex and intersecting financial topics and explain them in a way that is understandable and accessible for clients.

Their goal is to help clients understand the outcome and consequences of the financial choices they make through expert strategies, education, and advice, making Sensible Money one of the top financial planners in Scottsdale, AZ.

### **Key Factors That Enabled Sensible Money to Rank as a Top Scottsdale Financial Advisor**

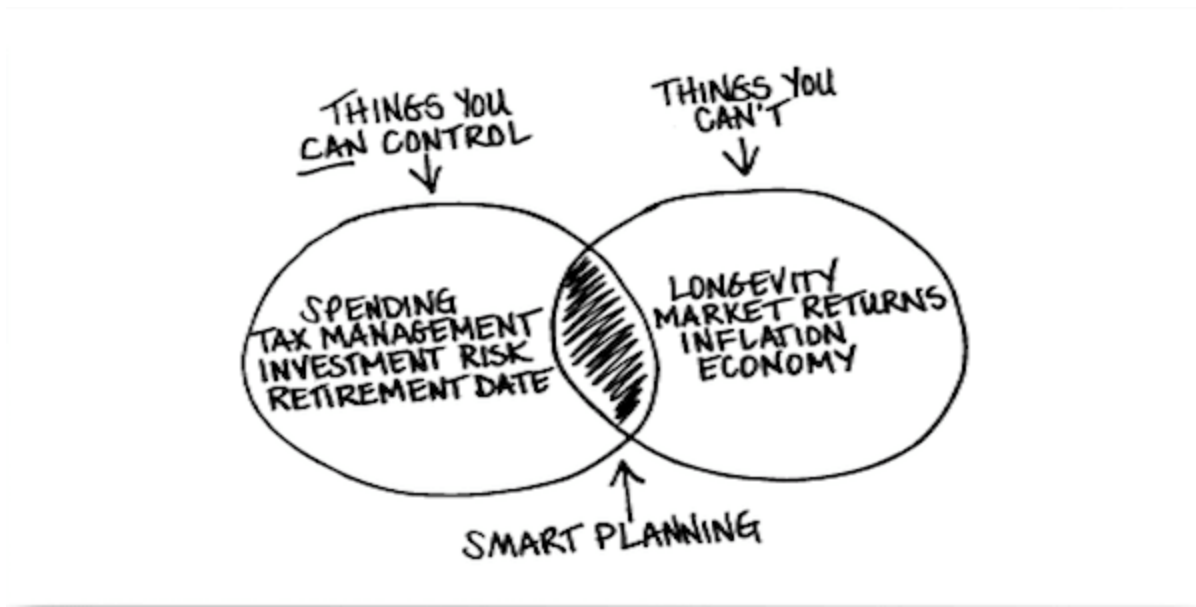
#### **Smart Planning Approach**

The work that goes into financial planning requires a step-by-step process that will make your money work as hard as you do. This wealth management firm in Scottsdale helps you identify what matters and focus your planning efforts on these priorities.

Sensible Money's financial planners show you what you can control (i.e. spending, tax management, investment risk, retirement date) and what you can't control (i.e. longevity, market returns, inflation, the economy).

Smart Planning is how these two things overlap. Strategic investment choices and proactive planning can help grow and protect your money in spite of the factors that are outside an investor's control.





*Best Scottsdale Financial Planners*

### **Juicing® and Juicing® Plus**

Juicing® is the brand name for Sensible Money's proprietary financial planning offering. This "product" offered by this Scottsdale financial advisor works to incorporate financial needs with your personal values.

The pricing for your Juicing® Plan is made to be both simple and accessible for a wide range of clients—at the completion of the plan, clients will owe a balance of \$5,700.

Juicing® Plus is an all-inclusive service that adds investment management, available to clients with investible assets of more than \$1 million.

With this service, these Scottsdale financial advisors can provide a full range of wealth management services, even coordinating with other professionals like CPAs, attorneys, mortgage brokers, and more.

### **Rating Summary**

With a clean, easy-to-understand approach that "[just makes sense](#)," Sensible Money is a great Scottsdale financial advisor for consumer to consider.

Not only does the firm make financial planning accessible to a wide range of investors, but it also boasts a talented team of industry professionals. Most notably, founder Dana Anspach is a leading source for financial insight, and is the author of *Control Your Retirement Destiny* and *Social Security Sense*.

With a proven history of financial expertise, a fee-only structure, and proprietary processes for financial planning and investment management, Sensible Money is one of the best Scottsdale financial advisors to consider partnering with this year.

***Don't Miss: Top Financial Advisors in New York, NY – Ranking & Comparison***

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## **Silverhawk Wealth Management Review**

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One of the top wealth management firms in Scottsdale, [Silverhawk Wealth Management](#) seeks to help high-net-worth clients plan, grow, and protect their wealth.

The firm's expertise in asset protection and allocation provides a continuous focus on reducing tax liabilities whenever possible. The firm also provides unique areas of expertise, like luxury realty services and benefits consulting for businesses and physicians.

We cannot confirm whether Silverhawk provides fee-only or fee-based services, though the firm is [likely fee-based](#) due to potential commissions from insurance sales or third-party money managers.

As always, we suggest that you verify a firm's fee structure before entering into a wealth management or financial planning relationship.

### **Key Factors That Enabled Silverhawk Wealth Management to Rank as a Top Scottsdale Wealth Management Firm**

#### **Praetego System<sup>SM</sup>**

For high-net-worth clients, increased wealth often comes hand-in-hand with increased complications. As such, Silverhawk Wealth Management has developed the proprietary Praetego System<sup>SM</sup> to help identify and counteract potential financial problems before they become significant issues.

This division of asset protection planning is designed to help clients avoid lawsuits, unfair judgements, or unfair claims of liability that may be sparked by increasing wealth.

With the Praetego System<sup>SM</sup>, high-net-worth clients will be able to protect and defend their assets through available legal tools, existing financial vehicles, and common business structures.

The firm clearly states that the Praetego System<sup>SM</sup> is designed to protect and defend and *not to* avoid taxes, keep secrets, hide assets, or defraud creditors.

### **Luxury Realty Services**

One of the most unique aspects of Silverhawk is their ability to assist clients with the financial challenges of luxury real estate. The firm is experienced in dealing with traditional sales, creative financing strategies, short sales, strategic defaults, and has served a variety of clients' real estate needs.

The firm maintains a network of reliable title companies, lenders, inspectors and contractors to handle all aspects of real estate transactions, ensuring a smooth experience long after transactions are completed.

The benefit of having in-house realty services is that clients who have more extensive real estate needs or who have a variety of assets tied up in realty can benefit from this Scottsdale financial advisory firm's multi-faceted expertise.

### **Rating Summary**

High-net-worth clients likely have unique financial challenges and goals when compared to everyday investors, which makes the services offered by Silverhawk Wealth Management extremely valuable.

Although the firm provides value for their clients through unique financial services and proprietary approaches, the inability to concretely confirm their fee structure may make it difficult for potential clients to effectively evaluate the firm.

By clearly outlining the firm's fee structure, Silverhawk Wealth Management could easily improve both their rating and their value proposition to potential clients.

***Popular Article: Top Financial Advisors in Denver, Colorado Springs, and Boulder (Colorado)***

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## **TCI Wealth Advisors Review**

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Founded in 1990, [TCI Wealth Advisors](#) is an independent, [fee-only](#) firm with a commitment to providing clients with trusted, respectful, honest, and open communication throughout the investment management and financial planning process.

Along with a fee-only structure, TCI Wealth Advisors also has a fiduciary commitment, meaning these Scottsdale financial advisors are legally held to acting in the best interests of each client.

## **Key Factors That Enabled TCI Wealth Advisors to Rank as a Top Scottsdale Financial Advisor**

### **ASPIRE Program**

TCI Wealth Advisors maintains a strong dedication to becoming a 100-year firm, providing expert Scottsdale financial advisory services for current clients, their children, and their grandchildren.

As part of this commitment, the firm released their ASPIRE program, designed to give younger generations access to professional financial planning and investment management.

Not only does this help set multiple generations of clients up for financial success, but it also fills an important gap in the financial services industry.

Young professionals are traditionally left out of professional financial management, setting TCI apart from competing firms offering wealth management in Scottsdale.

### **Comprehensive & Customized Financial Planning**

As one of the best Scottsdale financial planners, TCI provides a wide range of financial planning services, create to address a variety of financial needs. These services include:

- Investment Planning
- Charitable Planning
- Cash Flow Analysis & Planning
- Tax Planning
- Retirement Planning
- Estate Planning
- Education Planning
- Insurance Planning



## *Best Wealth Management Services in Scottsdale*

### **Rating Summary**

As a fee-only firm with a fiduciary commitment, TCI Wealth Advisors represents the ideal relationship with a Scottsdale financial advisor.

Not only can clients rely on receiving unbiased advice, but they can also rely on transparency in services and practices, which supports trust within the client-advisor relationship—a crucial component in any successful financial plan.

With a clear commitment to transparency and a client-centric focus, TCI Wealth Advisors is one of the best Scottsdale financial advisors to consider partnering with this year.

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## **Versant Capital Management, Inc. Review**

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Established in 2004, [Versant Capital Management, Inc.](#) is an independent, fee-only investment and wealth management firm in Phoenix, Arizona, that believes in the quality of service as a core company value.

With a team of highly experienced Phoenix wealth managers, Versant takes its name from a time-honored word for “experienced” or “practiced,” highlighting the firm’s primary objective: to act as skilled, well-versed, and highly knowledgeable financial and wealth advisory partners to their clients.

## **Key Factors That Enabled Versant Capital Management to Rank as a Top Phoenix Wealth Management Firm**

### **Redefined Client Services**

As a top Phoenix financial advisor, Versant offers client services that are unique and wholly redefined compared to traditional wealth management services. These include:

- **Capital Sufficiency Analysis**—Defining personal and family goals and customizing plans to effectively address assets, liabilities, cash flow, and taxable income
- **Investment Performance Reporting & Coordination**—Clients can expect full transparency and honesty with routine review meetings and detailing reporting on financial progress
- **Family Financial Resources**—Ongoing reviews address every aspect of financial health, including insurance, employee benefits, tax compliance, estate planning, and more
- **Family Governance**—Preparing heirs through financial education, developing family vision, and identifying values and goals

### **Focus on Long-Term Relationships**

The Versant Capital advisory team places a strong emphasis on building multi-generational relationships with its clients.

Company professionals will engage, educate, and work closely with clients, their kids, and grandkids to ensure the entire family is involved throughout the advisory process.

Unlike many competing firms offering wealth management in Phoenix, Versant Capital clients have direct access to the firm’s Chief Investment Officer, who oversees the managing of client portfolios and helps clients understand and interpret the firm’s investment philosophy.

This active focus—coupled with the transparent nature of a fee-only firm—supports dynamic, long-term relationships, creating a strong foundation for a successful Phoenix financial planning experience.

## Rating Summary

As an independent, fee-only firm, the team of Phoenix financial advisors at Versant Capital Management offer unbiased, expert financial planning and wealth management in Phoenix.

Their services are uniquely fine-tuned to meet the needs of high-income individuals along with their long-term family financial goals, making this firm a great option for high-net-worth individuals using financial planning to ensure their legacy.

With a fee-only pricing structure and a commitment to establishing long-term relationships, Versant is one of the top financial advisors in Phoenix to consider partnering with this year.

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## Conclusion - Best Financial Advisors in Phoenix & Scottsdale, AZ

Ultimately, narrowing down this list of top financial advisors in Phoenix and Scottsdale will depend on your unique financial goals, needs, and desires.

The next step is to choose three to five firms from the list that seem to best suit your needs and set up an introductory meeting.

Many of the top Scottsdale and Phoenix financial advisors offer complimentary meetings to determine if they are a good fit for your financial needs, which is a great tool to use when finding the best Phoenix and Scottsdale financial advisor for you.

After that, you will have all the information you'll need to make an informed decision and take yet another step towards establishing great 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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- <https://www.bigstockphoto.com/image-110526926/stock-photo-arizona-desert-landscape%2C-phoenix%2Cscottsdale-area>
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