
Top 8 Best Financial Advisors in Seattle & Bellevue, WA | 2018 Ranking

2018 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN WASHINGTON STATE

2018 Ranking of the Top Financial Advisors and Wealth Managers in Seattle & Bellevue (Washington)

Whether you have already entered retirement or are just beginning your financial planning and wealth management journey, having a good financial advisor by your side can be the difference between financial success and financial hardship.

Who are the best financial advisors in Seattle and the surrounding area?

The sheer number of financial advisors in Seattle and its surrounding areas makes choosing just one advisor a difficult task. However, by developing a clear idea of the services you are looking for and doing proper research, the answers to the following questions will soon become clear:

- Should I go with a fee-only fiduciary financial planner? How does a Washington-based independent advisor benefit me?
- Where can I find the best financial planning, wealth management, and asset management services in Seattle or Bellevue?
- Where should I go if I am looking for additional services like estate planning, tax management, and risk management?
- What types of fees do financial planners in Seattle charge?

While the final decision rests in your hands, we have compiled a list of the top financial advisors in Seattle and Bellevue to help give you a jump-start on your way to financial success.



Award Emblem: Top 8 Best Financial Advisors in Seattle & Bellevue (Washington State)

Top 8 Best Financial Advisors in Seattle & Bellevue, Washington in 2018 | Brief Comparison & 2018 Ranking

Top Wealth Management Firms in Washington State	Highlighted Features	2018 Ratings
Avier Wealth Advisors	Focus on supporting & empowering women investors	5
Boone Wealth Advisors	Expert private wealth management services	5
Brighton Jones, LLC	Personal CFO services	5
Goddard Financial Planning	Hourly fee pricing structure	5
Laird Norton Wealth Management	Expert estate transfer process	5
Sovereign Wealth Advisors	Wealth building strategies	5

Conlon Dart Wealth Management	Client-centric process	3
Merriman Wealth Management, LLC	Five-step process	3

Table: Top 8 Best Financial Advisors in Washington State | Above list is sorted by rating

How to Find the Best Bellevue & Seattle Financial Planners in 2018

When it comes to choosing the best financial planner in Seattle and the surrounding areas, there are plenty of firms to choose from. With so many options to consider, how can you narrow the search?

First, take a close look at what each financial advisor in Seattle or Bellevue has to offer, and match those services up with your own personal financial goals.

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

As you will see in the following reviews for financial advisors in Seattle, each firm specializes in varying areas of financial planning and wealth management.

If your needs are of a broader nature and you wish to have peace of mind through simple yet comprehensive financial planning, you may be well-suited with a Seattle or Bellevue financial advisor that offers a broader range of services.

Once you've narrowed down your choices to a select few of these top-ranking Seattle investment 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" any prospective financial planners in Seattle before committing to their services.



Best Financial Advisors in Washington

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 Wealth Management Firms in Seattle & Bellevue in 2018

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

- [Avier Wealth Advisors](#)

- [Boone Wealth Advisors](#)
- [Brighton Jones, LLC](#)
- [Conlon Dart Wealth Management](#)
- [Goddard Financial Planning](#)
- [Laird Norton Wealth Management](#)
- [Merriman Wealth Management, LLC](#)
- [Sovereign Wealth Advisors](#)

Click below for previous years' rankings:

- **2016 Review:** [Top 10 Best Investment Management Firms in Seattle, Bellevue, & Kirkland](#)
- **2017 Review:** [Top 10 Best Financial Advisors & Planners in Seattle, Bellevue, & Kirkland](#)

Avier Wealth Advisors Review

[Avier Wealth Advisors](#) offers investment advisory and financial planning services on a [fee-only](#) basis to families, businesses, and individuals.

As one of the top financial advisors in Bellevue, Avier Wealth Advisors provides clients with research-based wisdom and a wide range of investment options.

This Washington wealth management firm's partnership with Dimensional Fund Advisors gives clients access to exclusive, low-cost mutual funds that are based upon comprehensive research on long-term market drivers.

Key Factors That Enabled Avier Wealth Advisors to Rank as a Top Bellevue Wealth Management Firm

Talented Team

As a top Bellevue wealth management firm, Avier boasts a large team of financial advisors with a wide range of industry-recognized credentials and certifications. These include:

- CFP®—Certified Financial Planner
- CFA—Chartered Financial Analyst
- CPWA®—Certified Private Wealth Advisor
- CRPC®—Chartered Retirement Planning Counselor
- CAIA—Chartered Alternative Investment Analyst
- FRM—Financial Risk Manager

- AAMS—Accredited Asset Management Specialist

Many of these designations come with strict requirements for fiduciary duties and ongoing education, ensuring that clients receive advisement that is thoroughly up-to-date and in adherence to the highest ethical standards.

Combined with a commitment to maintaining a low advisor-client ratio, the Bellevue financial advisors at Avier are well-prepared to set their clients up for success through industry expertise and individualized attention.

Women & Investing

In addition to its team-based services and comprehensive approach, Avier Wealth Advisors is dedicated to helping women succeed. This Washington wealth management firm aims to serve women at every stage of life by facilitating financial education and independence.

This team of Bellevue financial advisors is particularly committed to dispelling the myth that women are too busy to manage their own finances and instead, pass along the financial decisions to their significant others.

Avier is committed to giving women the opportunity to identify their goals and understand the strategies that will help them meet their financial objectives, making them a top Bellevue financial advisor for women to consider partnering with.

Rating Summary

Unlike many Washington wealth management firms, Avier Wealth Advisors places a strong emphasis on supporting and empowering their clients through a deeper understanding of their personal finances, no matter where they are at in the investment or financial planning process.

With a highly accredited team, fiduciary duty, fee-only commitment, and a unique focus on supporting women investors, Avier Wealth Advisors is one of the best financial advisors in Bellevue to consider partnering with this year.

See Also: [**Top Financial Advisors in Orlando, Florida**](#)

Boone Wealth Advisors Review

Founded over 30 years ago, [Boone Wealth Advisors](#) is a [fee-only](#) Bellevue wealth management firm.

As an independent firm, clients can trust that these Bellevue financial advisors are not obligated to promote specific financial products, resulting in a truly unbiased point of view.

Key Factors That Enabled Boone Wealth Advisors to Rank as a Top Washington Wealth Management Firm

Talented Advisory Team

While the team of advisors at Boone may be smaller than competing financial advisors in Bellevue, these investment management and financial planning professionals bring decades of experience and highly regarded certifications. Some of these include:

- CFP®—Certified Financial Planner
- CFA—Chartered Financial Analyst
- FPQP™—Financial Paraplanner Qualified Professional
- AWMA®—Accredited Wealth Management Advisor

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

Independent Financial Planning

A financial advisor in Washington can help you go from rich to wealthy. Properly managing your money can help ensure your future financial security.

One of the Bellevue financial planners at Boone Wealth Advisors can help you organize your finances and apply a strategy that can help you work towards your financial goals by:

- Drawing up a complete financial statement and setting up goals
- Analyzing relevant aspects of your current financial picture
- Identifying weaknesses and recommending improvements
- Coordinating and implementing your plan

Planning for your financial freedom and security in retirement is one of the best things you can do with your current wealth, and one of these financial advisors in Bellevue can help you do that.

Private Wealth Management Services

Boone Wealth Advisors offers private Bellevue wealth management with a wide selection of funds and special access to unique share classes. These Bellevue financial planners can also minimize the amount of transaction fees that they wind up paying.

As an independent Bellevue financial advisor, Boone Wealth Advisors can recommend the best investments and products without being beholden to a specific company's proprietary offerings.

These Bellevue financial advisors work with clients who have at least \$250,000 in assets under management. They also offer fee reductions for accounts at \$1 million, \$5 million, and \$10 million.



Boone Wealth Advisors

Rating Summary

As an independent, fee-only firm, clients of Boone Wealth Advisors can trust that all financial advice is truly in their best interest, promoting trust and transparency within the client-advisor relationship.

With a strong range of financial management capabilities, a talented team, and an incredibly user-friendly website, Boone Wealth Advisors is one of the best financial advisors in Bellevue for clients to consider partnering with this year.

Don't Miss: Top Financial Advisors in Phoenix and Scottsdale, Arizona

Brighton Jones, LLC Review

Founded in 1999, [Brighton Jones, LLC](#) is a [fee-only](#) financial advisor in Seattle with a fiduciary commitment to provide clients with truly unbiased, transparent advisement.

As a top financial planner in Seattle, Brighton Jones provides clients with expert retirement services, tax and estate planning, and comprehensive wealth management.

Key Factors That Enabled Brighton Jones, LLC to Rank as a Top Financial Planner in Seattle

Personal CFO Services

For clients that want a comprehensive approach to wealth management, Brighton Jones offers Personal CFO Services to address a wide range of financial needs and goals. Areas covered by the Seattle wealth management professionals at Brighton Jones include:

- **Vocational Freedom Planning**—Addresses financial dynamics for retirement or a change in work
- **Withdrawal Strategy**—Creates tax-optimized portfolio spending strategies
- **Risk Management**—Assesses whether risk should be self-insured or handed over to an insurance professional
- **Strategic Philanthropy**—Designs and implements the right charitable giving strategy for your goals
- **Proactive Tax Planning**—Optimizes your net after-tax returns
- **Estate Planning**—Creates actionable plans to reduce costs and effectively transfer wealth
- **Outside Expert Coordination**—These financial planners in Seattle can expertly partner with in-house and outside experts to ensure that all advice is in-line with your greater financial plan

Expert 401k Advisors

Owning a business can certainly become complicated, especially when it comes to managing employee benefits packages.

For business owners, enlisting the help of a financial planner in Seattle can help employees receive the support they need and make smart financial decisions, ultimately improving the overall health of the business.

The Seattle financial advisors at Brighton Jones have deep experience providing fiduciary advice for executive compensation and benefits packages, including past clients like Amazon, Boeing, Microsoft, and Starbucks.

Rating Summary

As a fee-only firm with a fiduciary commitment, Brighton Jones provides clients with the highest standards of transparency and ethical practice, building a strong foundation of trust within the client-advisor relationship.

With a well-accredited staff, a solid set of financial services, and a client-centric philosophy, Brighton Jones is one of the best financial planners in Seattle to consider partnering with this year.

Conlon Dart Wealth Management Review

[Conlon Dart Wealth Management](#) is a [fee-only](#) financial advisor in Seattle, Washington that is dedicated to creating highly customized financial planning and asset management solutions for its clients.

This Seattle wealth management firm's experienced team exercises a holistic approach to financial planning, featuring a unique ability to help create integrated solutions within the framework of the complex lives of their clients.

Key Factors That Enabled Conlon Dart Wealth Management to Rank as a Top Seattle Wealth Management Firm

Talented Team

As one of the top Seattle wealth management firms, the team of advisors at Conlon Dart bring an average of over two decades working in finance, ensuring that clients can benefit from a wide range of industry experience.

Uniquely, Conlon Dart also employs four CFP® professionals, one of the highest-regarded designations in the industry. This is a significant advantage for clients, as the CFP® designation comes with strict requirements for fiduciary duties and ongoing education.

With a depth of perspective and a small, yet diverse team, clients can benefit from a boutique approach and individualized service that many Washington wealth management firms simply cannot match.

Client-Centric Process

For Conlon Dart, all successful wealth management plans combine three elements: Discovery, Strategy, and Communication.

Clients of Conlon Dart will partner with their Seattle financial advisor throughout each of these steps, gaining better financial health through:

- **Discovery**—Your Seattle financial advisor will carefully work through your goals and values to create a truly customized foundation for your investment plan.
- **Strategy**—Investment policies are created according to your unique circumstances, including tax, risk, and liquidity needs.
- **Communication**—Ongoing communication and accountability are essential pieces of any successful investment plan, and these Seattle financial advisors are committed to reaching out on a regular basis.



Conlon Dart - Seattle

Rating Summary

With fee-only services, a well-designed website, four CFP® professionals, and an average of more than 20 years in the financial industry, Conlon Dart is a competitive financial advisor in Seattle.

However, with very little specific information available about their financial services, our review found that new clients may have substantial difficulty when evaluating the firm's capabilities.

In fact, the only way to evaluate financial planning capabilities—and investment philosophies and specific services—is through the firm's [ADV](#), which is an extra step that many potential clients may not want to take.

By including additional details on the firm's full scope of financial capabilities, Conlon Dart can easily improve both their value proposition to new clients and their rating as a top financial advisor in Seattle.

Related: [Best Financial Advisors in Boston, Massachusetts](#)

Goddard Financial Planning Review

Formerly known as Blue Canoe Financial Planning, [Goddard Financial Planning](#) is a [fee-only](#) Seattle financial advisory firm, offering clients the unique benefit of operating solely on an hourly-fee basis.

For these Seattle financial advisors, financial success comes from balancing wants and needs while using expert guidance to get through choppy waters from unexpected currents or storms.

Key Factors That Enabled Goddard Financial Planning to Rank as a Top Financial Advisor in Seattle

Wide Range of Financial Capabilities

As a top financial advisor in Seattle, Goddard Financial Planning excels at providing clients with a variety of options when it comes to improving their financial health.

With each service corresponding to a unique hourly bracket based on complexity, some of the financial services offered include:

- Cash Flow Review

- Review of Assets
- Paying Off Debts
- Basic Retirement Modeling
- Home Affordability
- Life Insurance Needs
- Detailed Retirement Model
- Social Security Maximization
- Special Income Situations
- Investment Accounts

Long-Term Relationships

Goddard Financial Planning seeks to form long-term, ongoing relationships with its clients.

After the initial financial plan has been drafted and approved, clients of this top management firm in Washington can meet with advisors as often as they desire.

Annual meetings to make adjustments and track progress are available to clients who want them. Some of the things that occur during these annual meetings include updating current financial assets and rebalancing portfolios.

Also available to clients of this Washington financial advisory firm are “as-needed” meetings to deal with major and often unexpected life changes such as divorce, marriage, new children or inheritance.

Simple Fee System

The pricing is the most straightforward and simple system we have seen. It is hourly, and that’s all. The hourly rate is charged only for the time taken to create, update, or adjust the financial plan.

Goddard Financial Planning has no fees for assets under management, does not charge for commissions, and does not do product sales.

Not only does this fee-only approach eliminate bias, but an hourly fee can make partnering with a Seattle financial planner much more accessible, making effective Seattle wealth management possible for a wide range of clients.

Scouting Plan	Touring Plan	Journey Plan	Expedition Plan
< \$2,500	\$2,500 - \$3,600	\$3,600 - \$4,700	> \$4,700
< 9 hours	9-13 hours	13-17 hours	17+ hours

Goddard Financial Planning - Seattle

Rating Summary

While many Seattle financial planners only work with high-net-worth individuals, Goddard Financial Planning specifically welcomes all levels of investors, from those who are just starting out in building their assets to those who are simply seeking to protect or pass on what they have already built.

Additionally, their hourly fee structure provides a uniquely accessible way for clients to price out their specific financial services and determine exactly what they can afford.

With a fee-only structure, a talented advisor team, and a focus on creating long-term relationships, Goddard Financial Planning is one of the best financial advisors in Seattle to consider partnering with this year.

Laird Norton Wealth Management Review

Founded in 1967, [Laird Norton Wealth Management](#) is one of the top **fee-only** Seattle investment firms serving high-net-worth families, individuals, endowments, and foundations.

Over the years, Laird Norton has accumulated high levels of experience and expertise, making them one of the best financial advisors in Seattle and across the entire Pacific Northwest.

Key Factors That Enabled Laird Norton Wealth Management to Rank as One of the Top Seattle Investment Firms

Full Range of Services

A very attractive aspect of Laird Norton Wealth Management is that it provides a full range of services under one roof. These services include:

- Asset Allocation
- ESG and Impact Investing
- Tax-Aware Investing
- Manager Selection
- Tax Planning
- Philanthropic Planning
- Trust Services
- Estate Planning

Whether you need financial planning, investment management or trust services, these Seattle financial planners have you covered with your own three-person team (advisor, analyst, and associate).

Additionally, its larger team size means that Laird Norton can offer some perks otherwise unavailable to investors, such as negotiated discounts on investments and preferred pricing.

Expertise in Estate Transfers

Laird Norton, through many years of experience working with high-net-worth clients, understands the ins and outs of maximizing wealth transfer between generations.

Their financial planners in Seattle can ensure that heirs have the resources they need, and help individuals leave philanthropic legacies through charitable annuities, foundations, or charitable trusts.

Laird Norton also happens to be the oldest independent trust company in Seattle and in the Pacific Northwest. This distinguished Seattle wealth management firm has helped hundreds of families find the best trust and estate planning options for their unique situations.

Rating Summary

As a top financial advisor in Seattle, Laird Norton brings clients the advantage of an unbiased, client-centric approach, instilling a strong foundation of trust within the client-advisor relationship.

With a fee-only commitment, a wide range of financial services, and decades of experience, Laird Norton Wealth Management is one of the top Seattle investment firms to consider partnering with this year.

Popular Article: [**Top Financial Advisors in Houston, Texas**](#)

Merriman Wealth Management, LLC Review

Founded in 1983, [Merriman Wealth Management, LLC](#) is a [fee-only](#) firm with a focus on long-term goals and smart investing.

This financial advisor in Seattle seeks to bring its clients success and peace of mind by offering a comprehensive approach that involves not only investment planning but also tax planning, estate planning, insurance, risk management, and charitable donations.

Key Factors That Enabled Merriman Wealth Management, LLC to Rank as a Top Washington Wealth Management Firm

Five-Step Process

Merriman's five-step process starts with a discovery meeting in which advisors get to know their clients' relationships, values, goals, resources, health, and interests.

After this in-depth introduction comes a strategy meeting where a custom investment plan is created with expert recommendations given by Merriman's experienced staff of financial planners in Seattle.

An implementation meeting follows. Here, final questions are answered by your Seattle financial advisors before the implementation of the plan begins. Advanced plan meeting and progress meetings follows afterwards to ensure that clients remain on track towards their financial goals.

Merriman's unique and clear multi-step program helps to give its clients peace of mind while simultaneously ensuring forward movement.



Merriman Wealth Management's Five-Step Process

Comprehensive Portfolio Strategies

One of the biggest contributions that this Seattle wealth management firm makes to its clients is the ongoing assessment of each client's goals, needs, resources, and decisions.

Merriman seeks to evolve client portfolios in time with its clients' changing goals and plans through two portfolio strategies:

- **MarketWise**—Assets are allocated and rebalanced across asset classes using a carefully selected mix of low-cost mutual funds
- **TrendWise**—An actively managed strategy that applies proprietary quantitative models to invest globally and across asset classes (primarily ETFs)

Rating Summary

With fee-only services and a large, well-accredited team of Seattle financial advisors, Merriman Wealth Management is undoubtedly one of the most competitive Seattle investment firms for new clients to consider.

However, with very little specific information available about the specific details of their [comprehensive wealth management approach](#)—including strategies for taxes, insurance, and charitable giving—new clients may have substantial difficulty when evaluating the firm's full range of capabilities.

By highlighting specific strategies within comprehensive wealth management, Merriman can easily improve both their value proposition to new clients and their rating as a top financial advisor in Seattle.

Sovereign Wealth Advisors Review

[Sovereign Wealth Advisors](#) is an independent, fee-based advisor based in Bellevue. As one of the top financial advisors in Washington, Sovereign has been providing financial planning and wealth management services to the Pacific Northwest for over thirty years.

Clients of this Bellevue wealth management firm include young families, retirees, corporate executives, and small business owners, all of whom benefit from its comprehensive services.

Key Factors That Enabled Sovereign Wealth Advisors to Rank as a Top Washington Wealth Management Firm

Comprehensive Services

Sovereign Wealth Advisors targets broad financial goals, such as college funding, wealth accumulation, estate transfer retirement, and other life objectives. These Bellevue financial advisors also have the expertise needed to deal with more specialized financial challenges, like:

- Social Security and Medicare analysis
- Tax, estate, and legacy coordination
- Asset protection
- Stock option analysis for senior executives
- Business succession and continuation planning
- Analysis and coordination of illiquid assets
- Analysis of real estate holdings and transactions

Wealth Building

Sovereign Wealth Advisors uses an overall investment strategy based on long-term returns and a minimization of risk. Its team of Washington financial advisors works with clients to identify their individual goals and tolerances to develop a fully-diversified portfolio suited to their needs.

The process of creating such a portfolio is highly personalized and designed to bring clients comfort and peace of mind that their assets are safe and in good hands.

Experience and Resources

With over thirty years of experience, this financial advisory firm in Bellevue has the expertise needed to guide its clients through financial busts and booms using proven investment and financial planning principles.

This Washington wealth management firm's clients are given access to a variety of helpful tools:

- Leading financial planning methods for developing foolproof plans and strategies
- Expertise concerning all major financial areas, such as retirement planning, personal finances, tax planning, insurance planning, estate planning, and more
- Long-term financial counsel from advisors who make their clients a priority

Rating Summary

As a fee-based Bellevue financial advisor with a fiduciary commitment, Sovereign Wealth Advisors maintains trust and transparency in all that they do, effectively avoiding the conflicts of interest that are often associated with fee-based firms.

With a strong foundation of core services and a well-credentialed team, Sovereign Wealth Advisors is one of the best financial advisors in Washington to consider partnering with this year.

Read More: Best Financial Advisers in Leeds, UK

Conclusion: Top Bellevue & Seattle Wealth Management Firms

Now that you have read this list of the top Washington financial advisors in Seattle and Bellevue, you should be better prepared to answer these questions:

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

In reality, the answer to the question of which Washington financial advisor or wealth management firm is the best is entirely subjective, and will depend on your individual goals, needs, and desires.

The next step to take is to choose three to five firms from the list that seem to best suit your needs and set up appointments to meet the advisors. Afterwards, you will have all the information you need to make an informed decision and complete yet another step towards your financial target.

Rate Table Disclaimer

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

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- <https://pixabay.com/en/seattle-washington-panorama-city-2534686/>
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- <http://conlondart.com/our-team/>

- <https://goddardfinancialplanning.com/fee-structure/>
- <http://www.merriman.com/merriman-process/>