Top 9 Best Financial Advisors in New York, NY | 2018 Ranking

RANKING & REVIEWS
BEST FINANCIAL ADVISORS IN NYC

2018 Ranking: Identifying the Top Financial Advisors in New York City

Finding the right New York financial advisor, wealth management firm, or financial planner in a city as busy as New York City is not an easy task.

A metropolitan area like New York with its rich history in business, trade, and commerce makes it a prime destination for financial wealth management services. However, a basic search of financial advisors in New York leaves a lot of unanswered questions.

What information should you consider in your search for the best financial advisors in New York? Which New York financial advisors are fee-only, and which are not? What do New York wealth management firms offer in relation to your specific financial planning needs? Can you trust the information you find on their websites?

You will notice rather quickly what a time-consuming task finding the right information is.

Award Emblem: Top 9 Best Financial Advisors in New York, NY

In today's market, where you put your money really, really matters. Don't just make an investment with the first New York financial advisor you come across.

You should do your research and look beyond the slick promises of any New York wealth management firm and ensure you are viewing the full picture.

AdvisoryHQ uses a comprehensive review system and has done most of the work for you, so you can skip sifting through information for hundreds of New York advisory firms and simply compare the firms on our list to find the best financial planner for your needs.

Top 9 Best Financial Advisors in NYC | Brief Comparison & Ranking

Financial Advisors in New York	Highlighted Features	Ratings
Altfest Personal Wealth Management	Custom services & portfolio management for unique client profiles	5
Francis Financial	Drive to support & empower women to make good financial decisions	5
Frisch Financial Group	Specialized focus on family businesses, business executives, & generational wealth	5
Joel Isaacson & Co.	Integrated tax strategies	5
KLS Professional Advisors Group, LLC	Fee-only, open architecture design	5
MainStreet Financial Planning	Unique, flat-rate pricing tiers	5
Sontag Advisory	Client-centric, fiduciary approach	5
Stash Wealth	Modern NYC financial planning for young earners	5
HFH	Provides healthcare planning strategies	3

Table: Top 9 Financial Advisors in New York City | Above list is sorted by rating

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Tips for Selecting the Best NYC Financial Planners

When it comes to choosing the best NYC financial advisor, there are plenty of firms to choose from. With so many options to consider, how can you narrow the search?

First, take a close look at what each financial advisor in New York 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 New York, each NYC financial advisor 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 New York financial advisor that offers a broader range of services.

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

Whether it's a free or paid consultation, this can be a good way to "feel out" a prospective NYC financial advisor before committing to their services.

Best Financial Advisors in NYC

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services and products that are ranked on its various top-rated lists?

Please click here "AdvisoryHQ's Ranking Methodologies" for a detailed review of AdvisoryHQ's selection methodologies for ranking top-rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Best Financial Advisors in New York City

Below, please find the detailed review of each card on our list of the best financial advisors in New York. We have highlighted some of the factors that allowed these wealth management firms in New York 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.

- **Altfest Personal Wealth Management**
- **Francis Financial**
- **Frisch Financial Group Inc.**
- **HFH Planning**
- **Joel Isaacson & Co.**
- **KLS Professional Advisors Group, LLC**
- **MainStreet Financial Planning Inc.**
- **Sontag Advisory**
- **Stash Wealth**

Click below for previous years' rankings:

- **2016 Ranking: Top 10 Best Financial Advisors in New York**
- **2017 Ranking: Top 9 Best Financial Advisors in New York**

Altfest Personal Wealth Management Review

Founded in 1983, Altfest Personal Wealth Management is a fee-only New York wealth management firm.

The firm has grown significantly over the decades, building a solid foundation of comprehensive financial services backed by a team of innovative financial experts.

Key Factors that Enabled Altfest Personal Wealth Management to Rank as a Top NYC Wealth Management Firm

A Solid Team

Comprised of nearly 30 financial professionals, the team of NYC financial advisors at Altfest includes financial advisors, planners, managers, and directors.

Many bring diverse backgrounds in other fields, like science, psychology, and architecture, further strengthening this New York wealth management firm's knowledge base.

These best financial advisors in NYC also carry an impressive array of industry certifications, including:

- CFP®
- CFA
- CPA
- MBA
- MS
- Ph.D

Altfest's Custom Services

Altfest works with clients across all walks of life and financial situations and varies their financial planning and investment approach accordingly.

This means that each NYC financial advisor can custom tailor financial services to fit each client's lifestyle, like:

- Widows & Widowers
- Emerging Professionals
- Business Owners
- Physicians
- Dentists
- Executives
- Pre-Retirees & Retirees
- Women

This customized approach carries over into financial planning and investment management as well, providing clients with a financial plan that is truly unique to their preferences and goals.

Rating Summary

As a pioneer in the world of fee-only wealth management, Altfest provides one of the best benefits in the industry: all accounts are free from conflicts of interest that are typically associated with commission-based advice.

Not only does this financial advisor in NYC provide customized services for their clients, but they are also an industry authority, sought-after by publications like *The Wall Street Journal, The New York Times*, and more.

With a personalized approach and expert financial services, Altfest Personal Wealth Management is undoubtedly one of the best financial advisors in NYC to consider partnering with this year.

See Also: Top Financial Advisors in Denver, Colorado Springs, and Boulder (Colorado)

Francis Financial Review

Each member of the team of New York financial planners and analysts at Francis Financial brings different skills to the table—but what they all share is a common desire to help clients achieve financial peace of mind.

As a fee-only wealth management firm in New York, Francis Financial works with individuals with at least $1 million in investable assets.

Key Factors that Enabled Francis Financial to Rank as One of the Best Financial Advisors in NYC

Thoughtful Approach to Life Transitions

Services provided through Francis Financial are designed to carry clients through a host of life changes that are often accompanied by stress or emotional turbulence.

Their empathetic staff promises to be there for you with sound financial advice during your best—and worst—times. These New York financial planners provide services for:

- Loss of Loved One—With a goal to relieve stress and encourage healing, these NYC financial advisors can assist clients with estate planning, tax planning, investments, and more
- Divorce—This top NYC financial advisor helps clients through short-term and long-term financial needs of divorce with care and understanding
- Inheritance—Francis Financial is ready to provide thoughtful, expert guidance on inheritance planning through stressful or emotional times
- Retirement—As a top NYC financial planner, Francis Financial aims to help clients retire confidently and on their own terms through expert wealth management
- Career Change—Although changing careers can be rewarding, it also involves important financial decisions, and Francis Financial helps ease the transition

Plan-Grow-Protect

The 5-Step Plan-Grow-Protect® Approach is an extremely comprehensive plan for your financial future.

Clients will find that working with the New York financial advisors at Francis will progressively bring them closer to financial peace through each of the five steps, which include:

- Discovery—Your New York financial advisor will uncover your interests, values, goals, relationships, and assets
- Investment Plan—You will have the opportunity to ask questions, assess risks, and make changes to your plan
- Mutual Commitment—Clients become an official member of the Francis Financial family
- Foundation—Meeting with your NYC financial advisor to discuss financial details
- Review—Regularly scheduled reviews help keep NYC financial planning on track, allowing for periodic adjustments as needed

Woman-Led Team

If you are looking for a financial advisor in New York who understands the unique needs of their female clientele, look no further.

Stacy Francis, president and CEO, founded Francis Financial after witnessing first-hand how devastating life can be for women who are not financially empowered.

Eight out of ten staff members at Francis Financial are successful women in the financial industry, and the firm was awarded the 2014 and 2015 Women's Choice Award for "Best Financial Firm for Women."

Additionally, up to 10 percent of all proceeds are donated to charities, including SavvyLadies. Founded by Stacy Francis, this non-profit organization helps women find the information and resources they need to make empowered financial decisions.

Backed by powerful, motivated, and experienced women, Francis Financial stands out as a rarity in an industry where women are historically underrepresented.

Francis Financial Advisors, NYC

Rating Summary

For women that need expert guidance through some of the most emotionally trying life transitions, Francis Financial is an excellent choice.

The firm works to maintain a boutique feel that makes them much different from most New York financial advisory firms—an attractive quality for many clients that want a more personalized NYC financial planning experience.

Backed by solid industry knowledge and financial expertise, services are delivered with care and respect, solidifying the firm's 5-star rating as one of the best financial advisors in NYC.

Don't Miss: Best Financial Advisors in Atlanta, Georgia

Frisch Financial Group Review

Frisch Financial Group is a fee-only NYC wealth management and financial planning firm with a fiduciary commitment to always provide unbiased recommendations to their clients' best interests.

As a goal-based NYC financial planner, Frisch Financial Group seeks to clarify, organize, and consolidate finances through expert investment management and NYC financial planning.

Key Factors that Enabled Frisch Financial Group to Rank as One of the Top Wealth Management Firms in NYC

Small Scale of Clients

Frisch Financial Group, unlike most wealth management firms in New York, strives to keep a limited number of clients so they can best serve them.

This New York financial advisory firm's exclusivity allows them to provide customized financial care to executives, business owners, families, and ESG investors.

These clients have one very important thing in common that demands the need for a higher expertise than is found from the typical NYC financial advisor – complex tax issues, an area in which Frisch Financial Group is uniquely qualified.

Frisch Financial Group

Specialized Client Expertise

While this New York financial advisory firm happily works with a range of clients committed to improving their financial situation, there are three specific types of clients for which they have specialized expertise:

<u>Senior Executives</u>

Senior executives tend to have unusually complex financial situations. The New York financial advisors at Frisch Financial Group identify optimal methods of accessing assets and benefits to increase tax efficiency while maximizing wealth and protection.

Family-Owned Businesses

Family-owned businesses often have personal and business wealth tied together. This can become increasingly complex over time, which is why a New York financial advisor comes in handy.

The NYC financial advisors at Frisch can work with business owners and entrepreneurs to answer questions about:

- Taking income through salary or distributions
- How much cash should be left in the business
- Tax implications of passing on your business to your children
- Selling your business at retirement

Families Committed to Leaving a Legacy

Often, Frisch Financial Group works with more than one generation of a family, helping them view their financial landscape from the top of the family tree and not just their own branch.

Specific services include:

- Review of existing estate planning documents
- Gifting techniques and use of trusts
- Estate & generation skipping transfer tax illustrations
- Charitable planned giving techniques

Rating Summary

As a fee-only NYC financial advisor with a fiduciary commitment, Frisch Financial Group embodies the ideal partnership, ensuring that financial advice is always objective and always in the clients' best interests.

With comprehensive financial planning and investment management services, Frisch Financial Group is one of the best financial advisors in NYC for business executives, family-owned businesses, and families with generational wealth to consider partnering with this year.

Related: Top Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota)

HFH Planning Inc. Review

HFH Planning was founded by Hank Hanau, who sought to create a New York wealth management firm that offered the best financial planning for customers based on their needs - not on potential commissions.

According to the firm's ADV, HFH Planning is strictly a fee-only financial advisor in NYC based on hourly rates, effectively making expert NYC wealth management accessible for a wide range of income levels.

Key Factors that Enabled HFH Planning Inc. to Rank as One of the Top Wealth Management Firms in NYC

A Customized Process

Perhaps the most frustrating part of finding New York financial planners is finding what works best for your unique goals, assets, liabilities, and personal lives. Therefore, NYC financial planning should be customized to fit each client's needs.

At HFH Planning, coming up with a customized plan consists of the following key steps:

- Initial Consultation and Data Gathering
- Identification of Issues
- Goal Setting
- Examination of Alternatives
- Implementation
- Review/Revision

This New York wealth management firm clearly outlines this process, allowing clients to consider both their goals and any possible alternatives and options.

Clients are also included in future review processes, allowing their New York financial planner to make adjustments according to goals and life changes.

HFH Planning, New York

Diverse Services

Money permeates all aspects of life. As a result, a good New York financial planner should be able to take multiple aspects and scenarios into account.

This need is reflected in the wide range of services provided by this wealth management firm in New York. With HFH Planning, clients can receive the following services:

- Asset Allocation
- Estate Planning
- Retirement Planning
- Risk Management
- Tax Planning vs. Tax Preparation
- Cash Flow Analysis
- College Cost Planning
- Health Care Planning
- Tax Preparation

Rating Summary

As one of the best financial advisors in NYC, HFH Planning provides clients with solid advantages. Most notably, their unique take on a fee-only structure makes expert NYC wealth management and NYC financial planning accessible to a wide range of clients.

While their services encompass a wide range of financial needs, many services are not fully described, which may make it difficult for potential clients to fully evaluate the firm.

For example, although Asset Allocation is described as a diversified portfolio using 13 allocation categories, potential clients could significantly benefit from seeing exactly what these allocation categories are.

By adding more details about their services and investment approach, HFH Planning could better communicate their value to potential clients and easily boost their score to a 5-star rating.

Popular Article: Top Financial Advisors in St. Louis, MO

Joel Isaacson & Co. Review

Founded in 1993, Joel Isaacson & Co. is an independent, fee-only NYC financial advisor with a mission to create a mutually beneficial partnership between clients and investors to help clients achieve financial planning success.

Typical clients include high-net-worth individuals and families, business executives, owners, and entrepreneurs that require sophisticated NYC financial planning, investment management, and tax strategies.

Key Factors that Enabled Joel Isaacson & Co. to Rank as One of the Best Financial Advisors in NYC

Independent and Fee-Only Status

Built on an independent and transparent structure, Joel Isaacson & Co. is one of the best NYC financial planners to consider partnering with. As a fee-only wealth management firm in New York City, the firm's focus is clearly on their clients' best interests.

As an independent firm, Joel Isaacson & Co. is not part of any big institutional firms, allowing them to maintain objectivity in providing clients with the best possible advice to help them achieve their personal and business goals.

For potential clients that want truly unbiased advice and a client-centric approach, this independent and fee-only structure is key.

Integrated Tax Strategies

Creating a plan for all your tax needs certainly seems to be a niche strength for this team of financial planners in New York.

The goal of these New York financial advisors is not just to deal with your tax liabilities effectively, but to save you from overpayments and fees that can add up quickly. Integrated tax services include:

- Thoroughly review tax planning opportunities
- Conduct proactive quarterly and year-end planning
- Prepare personal, corporate, and fiduciary federal and state income filings

To support these services, Joel Isaacson & Co. has three tax professionals on their team (two of which are partners), ensuring that clients get truly expert tax strategies.

Rating Summary

As a fee-only NYC financial advisor with a fiduciary commitment, Joel Isaacson & Co. represents the golden standard in NYC wealth management.

This means that clients count on these NYC financial advisors to provide wholly unbiased financial advice that is appropriate for their unique situation, increasing trust between client and advisor.

Joel Isaacson & Co. also stands out for their expertise in providing integrated tax strategies, earning the firm a 5-star rating and making them one of the best financial planning and wealth management firms in NYC.

Read More: Best Financial Advisors in Charlotte, North Carolina

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KLS Professional Advisors Group, LLC Review

With offices in NYC and Los Angeles, KLS Professional Advisors Group provides financial planning and investment management services on a fee-only basis.

Founded in 1989, the firm proudly maintains one clear goal: to earn their clients' trust and loyalty by continuously providing valuable services.

Key Factors that Enabled KLS Professional Advisors Group to Rank as One of the Top Financial Advisors in New York

Fee-Only, Open Architecture Design

As a fee-only NYC financial advisor, clients of KLS have the benefit of receiving wholly unbiased advice, as the firm does not receive any compensation or benefits from their recommendations.

Their open architecture design serves to strengthen this unbiased approach, creating a truly client-centric approach to NYC financial planning and management.

With no proprietary products, the NYC financial advisors at KLS are free to conduct diligent research, ensuring that clients get the best possible recommendations.

Complete Financial Management

As a top financial advisor in NYC, KLS offers five key areas of financial planning:

- Investment Management—Portfolio construction, company retirement plans, stock options, trust accounts, and private investment opportunities

- Estate & Insurance Planning—Integration of insurance, estate planning, and investment management, trust utilization, gifting strategies, and more

- Retirement Planning—Cash flow projections, savings goals, retirement plans, deferred compensation programs, and more
- Financial Decision Making—Home purchase and financing decisions, prenuptial agreements, change of employment, and more
- Tax Planning—Roth conversions, return reviews, tax law changes, and more

Rating Summary

With a fee-only approach and an open-architecture structure, KLS offers their clients a truly unbiased approach, a key aspect of any successful financial planning endeavor.

Notably, by offering Financial Decision Making services, KLS offers clients the opportunity to rely on intermittent input from their NYC financial advisor on a number of life events, encouraging communication and relationship-building.

The firm also boasts a large team of directors with expertise in each service, acting as a singular resource for their clients, solidifying KLS Professional Advisor Group's 5-star rating.

Related: Top Financial Advisors in Philadelphia, PA

MainStreet Financial Planning Review

MainStreet Financial Planning is a fee-only financial planning firm in New York with offices in Maryland, California, and Washington D.C. as well.

Uniquely, MainStreet offers their fee-only services on an a-la-carte basis rather than assets under management, making NYC financial planning services accessible for a wide range of income levels.

Key Factors that Enabled MainStreet Financial Planning to Rank as One of the Top Financial Advisory Firms in New York

A Step-By-Step Guide

One of the simplest ways for clients to understand the financial planning process when working with an advisory firm in New York is to be presented with a step-by-step process. At MainStreet, this process includes:

- Initial Inquiry—Clients complete a questionnaire to help their New York financial planner understand their needs

- Initial Meeting—An NYC financial planner will provide a plan and discuss specific costs

- Goals Meeting—Clients discuss current cash flow and financial goals

- Interactive Session—Skype meetings are available to keep clients up-to-date on their progress

- Final Presentation—An NYC financial advisor will provide detailed advice on your financial plan and how to implement it

- Monitoring and Follow-Up—After receiving their financial plan, clients receive 30 days of free advice and a check-up after 6 months

Best Financial Advisors in New York

Unique Services

In the spirit of providing tailored, but comprehensive help for clients, these New York financial planners provide starting packages for people at different stages of their life.

Customers in these life situations can access financial planning services at the following starting price points:

- Quick Start: $750
- Single, No Children: $3,000
- Growing, Starting a Family: $3,600
- Near or Entering Retirement: $4,200
- Topic Specific Help: Hourly

Uniquely, this financial planning firm in New York also offers follow-up services to help clients stay on track towards meeting their goals. These services are split into two tiers:

- Continuous Service Silver—$150 per month or $1,800 per year
- Continuous Service Gold—$275 per month or $3,300 per year

Rating Summary

For clients that want a break from traditional NYC financial planning pricing models, MainStreet Financial Planning is a great fit.

Not only do they make financial planning accessible for a wide range of income levels, but they also focus on creating dynamic relationships with each client, a necessary component of any successful financial plan.

With a unique hourly pricing plan, a process that allows clients a unique independence, and a fee-only structure, MainStreet earns a 5-star rating as one of the best financial advisors in NYC.

Don't Miss: Best Financial Advisors in Cincinnati, Ohio

Sontag Advisory Review

Founded in 1995, Sontag Advisory is a fee-based firm providing comprehensive NYC wealth management and financial planning services.

Although AdvisoryHQ typically does not rank fee-based firms, we have chosen Sontag Advisory as a top NYC financial advisor for their fiduciary commitment, client-centric approach, and range of services offered.

Additionally, the firm does not sell insurance products, accept commissions, or referral fees, which are conflicts of interest typically associated with fee-based firms.

While the firm may receive indirect compensation from brokers through discounted software, this potential conflict of interest is well-disclosed on the firm's ADV.

Key Factors that Enabled Sontag Advisory to Rank as One of the Top NYC Financial Advisors

Unique Advantages

As a large and well-established NYC financial advisor, Sontag Advisory offers the following client-centric advantages:

- Large team with diverse financial backgrounds
- Fiduciary commitment
- Independent, unbiased advice
- Clients meet with senior portfolio managers
- Advanced software for trading, rebalancing, risk management, and client reporting
- Lower transaction fees from primary custodians
- Use of institutional share classes with low expense rates

These advantages will be particularly attractive to clients that need portfolio management, as the investment and risk management process at Sontag Advisory has been developed by experts with institutional experience.

Core and Comprehensive

To offer increased value and affordability, Sontag Advisory offers clients two service model options for investment management: Core and Comprehensive.

While the Comprehensive model describes the standard full-service, personalized investment management offered by the firm, the Core model provides a technology-based, self-service approach.

With this service, the NYC financial advisors at Sontag will create diversified portfolios for clients through Schwab Institutional Intelligent Portfolios.

As a result, clients can benefit both from expert portfolio diversification from Sontag and daily management from Schwab, providing online access, no transaction fees, automated re-balancing, and tax-loss harvesting.

Rating Summary

As a top NYC financial advisor, Sontag Advisory offers clients a wide range of benefits and advantages, including a client-centric approach, comprehensive financial management services, and the ability to enroll in robo-advisory services.

With no limitations on phone calls or meetings, client service is truly a priority, encouraging communication and solidifying the firm’s 5-star rating as one of the best financial advisors in NYC.

Popular Article: Top Financial Advisors in Tampa, St. Petersburg, and Palm Harbor, Florida

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Stash Wealth Review

With an energetic focus and appeal to younger earners, Stash Wealth offers a refreshing, unique, and highly accessible take on NYC financial planning.

Founded by Priya Milani and Rob Kovalesky in 2013, Stash Wealth is a small Brooklyn-based firm focused on helping millennials manage their money.

Although the firm does not list itself as fee-only, their ADV states that they do not accept commissions, referral fees, soft-dollar benefits, or any additional compensation, meaning that Stash Wealth likely operates on a fee-only basis.

As always, we recommend that potential clients confirm fee structure before partnering with a New York financial advisor.

Key Factors that Enabled Stash Wealth to Rank as One of the Best Financial Advisors in NYC

Financial Planning for H.E.N.R.Y.s™

While many NYC financial planners seek to attract high-net-worth clients with already-established wealth, Stash Wealth takes an entirely different approach.

This financial advisor in NYC serves “H.E.N.R.Y.s,” or those who are High Earners, Not Rich Yet. These are defined as individuals making approximately $100,000, or couples collectively making $180,000.

The goal is to make financial planning more attainable for younger earners, bringing in a new era of financially-savvy young adults—a group that is historically ignored by larger NYC financial planning firms.

Stash Wealth Financial Advisors

Stash Plans®

Part of what makes Stash Wealth one of the best financial advisors in NYC is their commitment to making NYC financial planning and wealth management both affordable and accessible.

This is done through two initial service packages, detailed below:

Stash Plan® for Individuals & Couples

Available for a one-time fee of $997, this plan empowers individuals and couples to leverage control over their finances through the following steps:

- Evaluate current situation
- Optimize credit cards, student loans, 401(k), stock options, emergency funds, etc.
- Uncover financial goals
- Automate savings
- Consolidate financial accounts
- Develop an investment strategy
- Answer money-related questions

Stash Plan® for Entrepreneurs

Available for a one-time fee of $1,597, this plan provides entrepreneurs with all the above benefits and more, including:

- Strategize for taxes & minimizing deductions
- Evaluate bank/credit card accounts
- Review business structure/legalities
- Discuss managing unpredictable income
- Factor business into a personal financial plan
- Assess profitability & how to receive a consistent income

These plans are a unique way to make financial services accessible, affordable, and simple—three elements that are traditionally lacking from larger wealth management firms in NYC.

Rating Summary

For millennial earners that want to approach financial planning with energy, passion, and even a little light-heartedness, the NYC financial advisors at Stash Wealth provide the perfect fit.

With a keen awareness of how to infuse fun into financial planning, Stash Wealth maintains a bright website that is filled with personality and humor, demonstrating a unique ability to transform a traditionally boring process into an energetic and motivating experience.

Although this team of NYC financial advisors may be younger in comparison, they bring a wealth of Wall Street experience, including executive and financial advisory positions at Morgan Stanley, Merrill Lynch, and MetLife.

While this energetic focus and unique pricing structure will not suit *every* client, Stash Wealth certainly excels at helping millennials become financially savvy, earning the firm a 5-star rating among the best financial advisors in NYC.

Conclusion - Top 9 Best Financial Advisors in New York, NY

As you can see, there is a lot to choose from when you are looking for the top financial advisor in New York City that is right for you.

When deciding which financial advisor in New York to contact, make a list of what you would like to get out of a relationship with your advisor. Once you assess your own needs, you can easily match those needs with a planner on our list.

Lastly, don't be afraid to take advantage of free consultations offered by New York financial advisory firms or to pick up the phone to ask a quick, yet potentially game-changing question.

Rate Table Disclaimer

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