
8 Best Financial Advisors & Wealth Management Firms in Portland, OR | 2019 Ranking

2019 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN PORTLAND, OREGON

2019 Rating of the Best Financial Advisors & Planners in Portland, Oregon

In the heart of the Northwest, Portland, Oregon is an eclectic mix of modern, bohemian, and sustainable. It's also the state's largest city and thus home to many of the best financial advisors and wealth management firms in Oregon.

When beginning a search for a top Portland financial planner, the sheer number of potential firms can be intimidating at first. Many people ask, "How do I find the best match for myself and my financial future?"

There are a few key factors we'll go over shortly that will help you differentiate between the many wealth management firms in the Portland area, such as fee structure and specialties. You'll also want to ensure their personality type fits your own since you'll be working closely with them.

Instead of having to search through hundreds of firms, we've narrowed down the list of the best Oregon financial advisory firms to the top eight you may want to consider. We've rated these firms based upon multiple factors, such as reputation, range of services, and commitment to act in a client's best interests.

This should help to considerably reduce the time it takes to find the perfect firm to guide you towards future financial success. Since identifying the right firm to trust to preserve and grow your wealth is typically the hardest step, this guide will take some of the burden off your shoulders and help you get started on the right path much sooner.



Award Emblem: Top 8 Best Financial Advisors in Portland, Oregon

Top 8 Best Financial Advisors in Portland, Oregon | Brief Comparison & Ranking

Top Wealth Management Firms in Portland	2019 Ratings
Confluence Wealth Management	5
Hausman Advisors	5
Interactive Wealth Advisors	5
New Outlook Financial, LLC	5
Northwest Capital Management, Inc.	5
Springwater Wealth Management	5
Vision Capital Management, Inc.	5
Vista Capital Partners	5

Table: Top 8 Best Financial Advisors in Portland, Oregon | Above list is sorted by rating

How Do You Choose the Best Portland Financial Advisors?

With many financial planning firms in Portland, Oregon offering similar services, how do you differentiate one from another in order to find the best one for your personal financial needs?

There are a few questions you can ask yourself as you go down this list of the top Portland wealth management firms that will help you identify your best options. These can quickly help you highlight which firms you'll want to take the next step with to set up a "get to know you" meeting.

What's My Main Financial Objective & Can This Firm Address It?

Are you worried about being ready for retirement? Do you have generational wealth and need a trusted and experienced financial advisor that offers family office services? Are you saving for a child's education at the same time as trying to save for a dream home?

Portland, OR financial advisors will have different specialties, so you'll want to see if they mention working with your types of financial needs prominently on their website.

Does My Level of Investable Assets Match Their Requirements?

An easy differentiator is whether you meet a firm's minimum requirements for wealth level or investable assets. Some firms won't have any requirements and will work with all asset levels, while others may only work with high-net-worth individuals.

Am I Comfortable with Their Fees & Fee Structure?

The top financial management firms in Portland will be completely transparent about their fees so you'll know up front what the cost for their services will be.

It's also important to know the difference between fee structures. "Fee-Only" Portland financial advisors do not accept outside commissions from sales of financial products, reducing any conflicts of interest.

"Fee-based" firms do accept outside commissions but will often be fiduciaries which helps counteract the inherent conflict of interest. A fiduciary is legally bound to always act in their client's best interest, no matter their fee structure.



Top-Rated Financial Advisory Firms in Portland, Oregon

2019 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 Portland, Oregon

Below, please find the detailed review of each firm on our list of 2019 best Portland wealth management firms. We have highlighted some of the factors that allowed these financial advisors in Portland, Oregon to score so highly in our selection ranking.

Click on any of the names below to go directly to the review section for that firm.

- [Confluence Wealth Management](#)
- [Hausman Advisors](#)
- [Interactive Wealth Advisors](#)
- [New Outlook Financial, LLC](#)
- [Northwest Capital Management, Inc.](#)
- [Springwater Wealth Management](#)
- [Vision Capital Management, Inc.](#)
- [Vista Capital Partners](#)

Click below for previous years' rankings:

- **2018 Review: 8 Best Financial Advisors & Wealth Management Firms in Portland, OR**
- **2017 Review: Top 8 Best Financial Advisors in Portland, Oregon**
- **2016 Review: Top 7 Financial Advisors in Portland, Oregon**

Confluence Wealth Management Review

Helping clients not only build wealth but also enrich their lives, [Confluence Wealth Management](#) is a top-rated Portland financial advisor that works with executives, professionals, business owners, retirees, corporate retirement plans, endowments and foundations.

The firm is a [fee-only](#) wealth manager in Portland that enjoys working with a diverse group of clients at all stages of their life and wealth, making them an excellent option for many individuals and families.

Key Factors That Enabled Confluence Wealth Management to Rank as a Top Portland Wealth Management Firm

Wealth Lifecycle Planning

Confluence's wealth planning process is based on what is known as "[the wealth lifecycle](#)," which is sectioned into three stages: acquiring, growing, and securing your wealth.

These Portland financial planners expertly guide individuals through each aspect of their personal wealth lifecycle to ensure their financial plan is on track and successful.

Whether you have just come into wealth or are trying to grow wealth that has already been established, without proper financial planning, that money could diminish over time.

There is thoughtful work involved in protecting and securing wealth to help it grow, which is why many high-net-worth individuals secure the services of a Portland wealth management firm.

Areas where the Portland financial advisors at Confluence can help you include:

- Financial Planning
- Investment Management
- Tax Planning
- Risk Management
- Retirement Planning
- Estate Planning
- Charitable Gifting

Comprehensive Wealth Management

A Portland financial advisor at Confluence can help clients set up an integrated wealth management strategy. This strategy will depend upon your goals for your money and where you stand in the wealth lifecycle.

Since Confluence offers a wide range of services, your advisor will help you determine what combination will best suit your needs and help you meet your objectives.

The great thing about this wealth management firm in Portland is that they are happy to work alongside any professionals that are currently advising you and believe in an integrated approach. They are committed to ensuring all elements of your wealth management strategy work together smoothly.

Individual services offered by this Portland wealth management firm include:

- Asset Allocation/Investment Strategy
- Cash Flow Management
- Charitable Gifting
- Education Planning
- Estate Planning
- Financial Planning
- Income Distribution
- Investment Management
- Retirement Planning
- Risk Management
- Tax Planning



2019's Best Portland Financial Planning Firms

Rating Summary

Rather than being focused just on your money, Confluence is focused on your entire financial well-being. Their tagline “Let’s make it matter” exemplifies their goal to be a partner to you to help address life’s challenges and dreams with expert guidance.

Also noteworthy is this Portland wealth management firm’s community involvement, lending time and expertise to both professional and civic organizations in their community.

With a well-credentialed and experienced team, a wide array of services, and desire to work with clients at all stages of wealth, Confluence Wealth Management earns a 5-star rating as one of the best financial advisors in Portland, Oregon to consider partnering with this year.

Don’t Miss: [Top Financial Advisors in Phoenix and Scottsdale, Arizona](#)

Hausman Advisors Review

Dedicated to always doing what’s right for their clients, [Hausman Advisors](#) is a wealth management that has offices in both Portland and Hood River, Oregon. It offers far-reaching financial advisory services with a specialty in working with families that have more modest planning needs.

While Hausman Advisors may have a smaller team than other Portland financial advisors, we have included them on our list for the wide range of services they provide and the fact that they are a [fee-only](#) firm that's also a fiduciary that offers local, independent, and objective advice.

Key Factors That Enabled Hausman Advisors to Rank as a Top Wealth Management Firm in Portland

Evidence-Based Investing

An investor's worst enemy is often themselves. Emotion-based investment choices often lead to undesirable results. Trying to time and beat the market may work once in a blue moon if you are lucky, but it is not a sustainable long-term strategy if you are trying to grow and preserve your wealth.

This wealth management firm in Portland acts as your “Personal Wealth Engineer” to help you:

- Reduce financial stress
- Clarify financial decision-making
- Gain confidence
- Free your time

Hausman Advisors emphasizes scientific investing that creates a strong foundation based upon facts, rather than the emotions of the moment.

This wealth management firm in Portland concentrates on evidence-based planning that helps clients work diligently towards their long-term goals while minimizing the amount of risk involved. The fundamental tenets of this approach to smart investing are:

- Sound portfolio theory
- Sound portfolio construction
- Sound investment management

Specialized Planning

Like most wealth management firms in Portland, Hausman Advisors offers comprehensive wealth management services that offer each client the core services they need to build and protect their wealth. While this approach works for most situations, they are aware that at times flexibility is needed for unique circumstances.

To that end, Hausman Advisors is a wealth management firm in Portland that can work with clients to provide individualized solutions to unique challenges. Sometimes, this unique circumstance is more unexpected than it is complicated, such as the death of a spouse or a sudden career change.

Whatever financial challenges you may be facing, these Oregon financial advisors come equipped with the expertise needed to adjust a financial strategy according to the following:

- Imminent Issues: An urgent financial concern that has to be addressed before moving on to traditional financial planning and wealth management
- Family Steward Support: Certain family members may require more concentrated financial planning and support
- Exploratory Due Diligence: As a top Portland financial advisor, Hausman Advisors understands that everyone has a different method for determining whether their services are a good fit, and they are flexible when matching a client's desired pace

Rating Summary

Hausman Advisors offers clients a personal touch not often found at larger financial advisory firms. They also have a specialty in working with those with more modest needs, which opens up the benefits of expert financial planning to those that often feel left out of this sector.

The firm is well credentialed and a member of several organizations, such as The BAM Alliance, a community of independent financial advisors, and NAPFA (National Association of Personal Financial Advisors).

With a dedication to putting their clients' needs at the forefront with a fee-only fiduciary structure, a client-focused commitment, and completely customized solutions, Hausman Advisors solidifies their 5-star rating as one of the best financial advisors in Portland, Oregon to consider partnering with in 2019.

Interactive Wealth Advisors Review

Committed to helping clients reach financial freedom, [Interactive Wealth Advisors](#) is a top-rated financial planning firm that serves clients in Portland and the surrounding areas. Their goal is to help people build, manage, grow, and protect their assets.

The firm is a [fee-only](#) Oregon wealth manager that does not accept any outside incentives or commissions, giving clients the security of knowing all their advice is completely objective and without any hidden agendas.

Key Factors That Enabled Interactive Wealth Advisors to Rank as a Top Financial Planner in Portland

Retirement Planning

People often think that retirement planning is all about accumulating assets, but it's also about how to properly spend your assets to ensure a retirement that's comfortable and can last throughout a long lifespan.

These expert financial planners in Portland help you formulate a plan that can address important retirement factors, such as:


- How will your investments perform?
- What types of health care costs will you face?
- Will you need to go into a long-term care facility?
- How drastically will your assets be impacted by inflation?

And perhaps the most difficult question: Will I outlive my retirement funds?

The team of Portland financial advisors at Interactive Wealth Advisors can help you answer all of the above questions and prepare you for a variety of retirement scenarios. Their well-planned strategies for retirement are built around both your current reality and your post-retirement objectives.

Components that they help integrate into your overall financial plan include:

- Tax-smart investing
- Sources of retirement income (i.e. retirement plans, pension plans, Social Security)
- Spending plan that takes into consideration the standard of living you desire and potential market conditions
- Estate planning needs



Retirement the Way You Want It

TELL US ABOUT YOUR DREAMS

2019 Top Wealth Management Firms in Portland

Transition Planning

Some of the best financial plans are derailed due to unexpected life changes. When your personal life is thrown into turmoil, alerting your Portland financial advisor to your life changes as soon as possible can ensure your financial plan is adjusted accordingly.

The expert advice of a Portland wealth management firm can help you take an honest assessment of your situation before making any catastrophic financial choices.

Interactive Wealth Advisors can help you financially navigate personal life events. Their Oregon financial advisors can assist you with:

- Sudden changes in wealth
- Marriage or divorce
- Birth or loss of a loved one
- Career changes
- Other instances of personal, financial, or professional upheaval

No matter what kind of transition a client is going through, Interactive Advisors is at their side and ready to help them evaluate, invest, insure, plan, act, and enjoy the life that good financial planning can enable.

Rating Summary

Interactive Wealth Advisors provides a comprehensive approach to financial planning that many Portland residents find inviting and easy to understand. Their fee-only, independent status also creates a foundation of trust and transparency.

Their tailored approach to retirement planning and wealth management ensure that your distinct needs and goals for the future are fully considered and integrated into a multi-faceted financial plan.

With a proactive approach, a passion for helping their clients succeed, and a commitment to excellence and integrity, Interactive Wealth Advisors scores 5-stars as one of the best financial advisors in Portland, Oregon to consider partnering with this year.

Related: [Top Financial Advisors in Orlando, Florida](#)

New Outlook Financial, LLC Review

[New Outlook Financial, LLC](#) specializes in helping individuals, families, and small organizations integrate their finances with their values. This innovative Oregon financial advisor has two offices, one in Portland, Oregon and one in Missoula, Montana.

The firm is a [fee-only](#) financial advisor that offers hourly rates, providing flexibility for clients to utilize their services as much or as little as they need. They enjoy working with clients from “all walks of life” to guide them toward a stable financial future.

Key Factors That Enabled New Outlook Financial, LLC to Rank as a Top Wealth Management Firm in Portland

Financial Planning & Investment Advisory Services

As a top wealth management firm in Portland, New Outlook Financial offers comprehensive personal finance guidance suited to just about anyone. Their approach helps clients identify their goals and challenges and create a financial strategy that is in line with their personal values.

Oftentimes, there's a fear that successful wealth management has to be separated from a person's values, but the right wealth manager in Portland can help ensure both are perfectly aligned.

All of this top-rated Portland financial advisor's services are provided under the umbrella of their fiduciary standard. They're legally bound to always act in the best interests of their clients.

Additionally, they're a member of Garrett Planning Network (GPN) an international network of fee-only financial planners.

You'll have several financial service options under one roof when working with these Portland financial advisors, including:

- Retirement Planning Strategies
- Cash Flow/Spending Planning
- Debt Management Planning
- College Funding Advice
- Stock Option Advice
- Pension Distribution Advice
- Life and Disability Insurance Needs Analysis
- Second Opinion of your current financial plan
- Financial Seminars

Socially Responsible Investing

As a value-driven wealth management firm in Portland, New Outlook offers clients access to socially responsible investing (SRI) techniques. This allows clients to grow their wealth by supporting the success of companies that they are ideologically aligned with.

For clients that wish to invest in companies that they believe are positively contributing to society, socially responsible investing is a great fit. The financial advisors at New Outlook research companies extensively to ensure that clients grow and preserve their wealth in an ethical manner matched with their values.

New Outlook assists clients with engaging in socially responsible investing by focusing on the following factors:

- Research & Screening
- Community Investing
- Shareholder Advocacy
- Social Venture Capital

Rating Summary

Clients looking for a Portland financial advisor that's a little different than the rest and that supports sustainable values, will appreciate working with New Outlook Financial. It offers clients a flexible hourly rate, allowing people from all wealth levels to benefit from expert financial guidance.

The team at New Outlook doesn't only help clients with socially responsible investing, they are also committed to sustainability as a business. The firm incorporates several practices to reduce the size of their footprint on the planet, such as minimizing paper use and commuting by bike or public transportation.

With a planet-friendly style, a welcoming approach, and the ability to handle multiple financial needs, New Outlook Financial solidifies a 5-star rating as one of the best Portland, Oregon financial advisory firms to consider partnering with this year.

Northwest Capital Management, Inc. Review

Laying a foundation of trust, excellent, and communication, [Northwest Capital Management, Inc.](#) (NWCM) is a top-rated Portland wealth management firm with an additional office in Seattle, Washington.

They work with private clients, corporations, philanthropic organizations, and retirement plan sponsors.

The firm is a fiduciary, and their [ADV](#) states it is fee-based, however we also found mention on its [website](#) that the firm only earns “...compensation that is only paid by you. No company can legally pay us commissions or 12b-1 fees. We do not accept referral fees from third parties.”

Key Factors That Enabled Northwest Capital Management to Rank as a Top Wealth Management Firm in Portland

Certified B Corp

NWCM is a certified B Corporation, which means they meet the highest verified standards of both social and environmental performance. Clients working with this Portland financial advisor are partnering with a community leader and upholds high standards of public transparency.

Aligning with their commitment to community, is CapitalYOU, a B-Corp resource that NWCM provides to clients and non-clients alike to help boost their education for financial fitness.

Resources provided through CapitalYOU include the following.

- [Lunch & Learn](#): Through a series of Lunch & Learn videos viewers can build their knowledge and financial health
- [FAQ](#): Access a database of frequently asked questions that include topics like 401(k), IRAs, and taxes
- [Ask an Expert](#): If you have a question not addressed in their FAQ, you can send it in and get an unbiased answer in about one business day

- Video Library: 2 to 4-minute videos that cover topics like saving for retirement, investment basics, and understanding returns
- Financial Calculators: Six different financial calculators that cover factors such as the cost of delay and paying down debt
- Getting Out of Debt: An in-depth look at topics surrounding credit card debt, student debt, and mortgages



Top Financial Advisory Firms in Portland, OR

Big Picture Study®

Rather than use some “black box” algorithm, the Portland financial advisors at NWCM prefer a more one-on-one approach. They feel that there is no substitute for a good conversation about your financial goals, risk tolerance, and resources.

Their Big Picture Study® is designed to help them gain a full understanding of your financial needs so they can create a custom roadmap to your financial freedom. The process involves:

- Listening to you and learning your concerns, goals, and objectives
- Collecting information related to your circumstances and resources
- Translating your dreams and aspirations into quantifiable targets
- Developing strategies in writing to help you achieve your financial goals
- Reviewing your plan, making adjustments where needed, and including benchmarks

Rating Summary

Northwest Capital Management has a dedicated team of client-centric financial advisors whose goal is to directly impact their clients' ability to realize their dreams. The firm takes a hands-on approach to truly learn about each client, ensuring their strategy will match their needs.

Their fiduciary commitment to be completely transparent about all fees and to always put their client's best interests first mean the client-advisor relationship starts on a solid foundation of trust.

With a team dedicated to financial education and a wide range of services for both individuals and organizations, Northwest Capital Management scores a 5-star rating as one of the top Portland, Oregon financial management firms to consider working with in 2019.

See Also: [Top Financial Advisors in Wisconsin \(Milwaukee, Pewaukee, Waukesha, Cedarburg, and Mequon\)](#)

Springwater Wealth Management Review

[Springwater Wealth Management](#) has a mission to empower clients to feel financially comfortable and secure. This top-rated Oregon financial advisor has a Portland office located in nearby Beaverton, OR and a Bay Area office in Santa Cruz, CA.

The firm is a [fee-only](#) wealth management firm in Portland that largely serves women and families and specializes in periods of transition and helping minimize financial fears during those times.

Key Factors That Enabled Springwater Wealth Management to Rank as One of the Best Financial Advisors in Portland, Oregon

Financial Planning

Springwater Wealth Management has a detailed process for determining a client's financial goals and building their personal financial strategy. A Portland financial advisor at Springwater will take new clients through the following steps:

- Discovery: Learning what is important to you and how these Portland financial planners can help address those items
- Modeling: Your Portland financial advisor will create a model of your future, projecting inflation, taxes, returns, and more
- Scenarios: Clients can consider a number of alternate “what if” scenarios
- Stress Testing: Ensures that a retirement plan will be successful through changes like inflation, tax rates, longer lifespans, and more
- Putting it All into Action: Provides an opportunity for review and plan implementation
- Keeping It Current: Includes annual check-ins and updates as needed, and unlimited planning advice for wealth management clients

Not only does this comprehensive process keep things organized, it also ensures that clients know exactly what is happening with their money at every stage of the financial planning process.

Divorce Financial Analysis

Going through a divorce is already an emotionally draining experience. It can also be financially chaotic, with fears and unknowns, and that only adds additional turmoil to an already tense situation.

A Portland wealth management firm can help you pick up the pieces of your finances before, during, and after your divorce to minimize financial stress.

Among this staff of Portland financial advisors at Springwater Wealth are professionals with the CDFA™ certification, which stands for Certified Divorce Financial Analyst. With a background in law or finance, they can help individuals save time, money, and energy by providing guidance in:

- Settlement negotiations
- Retirement options
- Spousal support/child support
- Tax implications of different scenarios

Rating Summary

Springwater is like a shelter in the storm for many of their clients going through significant life changes. These Portland financial planners work to empower clients and help them build a solid plan for the future.

Their collaborative approach to financial management, ensures clients get the best advice that's the combination of multiple years of advisor experience and industry expertise.

With a fee-only structure, a specialty in finances during transition, and a wide range of services, Springwater Wealth Management scores a 5-star rating as one of the best financial advisors in Portland, Oregon to consider partnering with this year.

Popular Article: [Top Financial Advisors in San Antonio and New Braunfels, Texas](#)

Vision Capital Management, Inc. Review

Founded in 1999 by a mother-daughter team, [Vision Capital Management, Inc.](#) is a top Portland wealth management firm based upon client-driven values and customer service that goes a step beyond the norm.

This independent, [fee-only](#) financial advisory firm in Portland includes financial planning services along with their investment management fee and believes in providing a fully integrated investment strategy.

Key Factors That Enabled Vision Capital Management, Inc. to Rank as One of the Best Financial Advisors in Portland, Oregon

Large, Talented Team

For many clients, an important quality of the best financial advisors in Portland, Oregon, is a firm that is well-qualified to handle a variety of financial challenges.

Over the course of a financial planning relationship, needs and objectives are subject to change from one year to the next as life evolves, so having a team that can handle a wide variety of financial challenges is key.

To meet the ever-changing needs of their clients, Vision Capital Management maintains a dynamic team of financial advisors in Oregon that hold industry-leading certifications such as:

- CFP®—Certified Financial Planner

- CFA—Chartered Financial Analyst
- CPA—Certified Public Accountant
- CDFA—Certified Divorce Financial Analyst
- CMFC—Chartered Mutual Fund Counselor
- CPWA®—Certified Private Wealth Advisor
- IACCP®—Investment Advisor Certified Compliance Professional

Additionally, over half of the staff at Vision Capital Management are women, including principals, managers, and Portland financial advisors. In an industry where women are historically underrepresented, Vision Capital Management stands out as a firm committed to both a talented and diverse team.



Best Wealth Management Firms in Portland, Oregon

Financial Planning Through Transitions

Whether positive or negative, major life transitions can be extremely disruptive to one's financial health, especially if they happen without the helpful guidance of a Portland wealth management firm.

The Portland financial planners at Vision Capital Management can help their clients positively navigate through a variety of transitions, including:

- Getting married
- Starting a family
- Changing careers
- Divorce
- Illness

- Blending families
- Death of a loved one
- Selling a business
- Passing wealth to the next generation
- Selling real estate
- Approaching retirement
- Inheriting wealth

When developing wealth management strategies for life transitions, Vision Capital Management can easily connect and coordinate with other financial professionals that you may be working with to ensure that all plans are fully integrated.

Rating Summary

Vision Capital Management acts as both a partner and advocate for their clients' financial success. They believe simply that relationships matter and that the needs of their clients should come before all else.

Their talented team of financial advisors come from a diverse range of backgrounds and hold a number of industry designations and achievements. This ensures clients are working with an educated and talented financial partner.

With a variety of financial education resources, a fee-only structure, and a broad array of services, Vision Capital Management earns a 5-star rating as one of the best financial advisors in Portland, Oregon to consider partnering with in 2019.

Vista Capital Partners Review

Driven by the question, "What would I do if it were my money?", [Vista Capital Partners](#) is a top Portland, Oregon financial advisory firm that uses academic evidence, rather than hype, to guide their clients' financial plans.

The firm is an independent [fee-only](#) wealth manager in Portland that was founded in 2001. Their unique company culture includes quality people, a strong investment philosophy, and personalized client service.

Key Factors That Enabled Vista Capital Partners to Rank as One of the Best Portland Wealth Management Firms

The Vista Advantage

As a client of this top-rated Portland wealth management firm, you'll go through a detailed, personalized process that they call "The Vista Advantage." This includes three key pillars of their award-winning approach to financial management:

Plan

During this stage, your Portland wealth management professional will discuss your goals and any financial questions that you may have about your future. It covers a variety of financial topics, like retirement, education funding, protecting your wealth, diversifying a dynamic portfolio, and philanthropic goals.

Perform

Portfolios are constructed based upon Nobel Prize-winning research, focusing on overlooked asset classes that are disciplined, diversified, and low-cost and products that have systematically rewarded investors with higher returns.

Prosper

In this stage, your Portland financial advisor will help you look at your entire financial picture to ensure that your long-term financial health continues to grow and allow you to live a prosperous life.

Wide Range of Services

Integrated financial management is made easier when your financial advisor provides multiple complimentary services.

Financial goals and plans are also subject to fluctuate over time, stressing the importance of working with a wealth management firm in Portland that can address multiple aspects of your financial life.

To that end, Vista Capital Partners can help their clients address a wide range of financial challenges, including:

- Planning for business owners
- Preparing for retirement
- Leaving a legacy
- Diversifying a concentrated position
- Building a charitable legacy
- Sensible tax management

Rating Summary

All advice that Vista Capital Partners provides their clients starts from the premise of what they would do if it were their money being invested. This ensures thoughtful financial planning that is optimized according to years of academic research.

This Portland financial planning firm is also community focused, sponsoring an essay contest that awards a \$2,500 college scholarship, donating a percentage of their profits to charitable causes, and volunteering in the community.

With an in-depth investment approach, an experienced team, and a unique approach to financial planning, Vista Capital Partners scores a 5-star rating as one of the best Portland wealth management firms to consider partnering with this year.

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

Conclusion – 2019 Top 8 Best Financial Advisors in Portland, Oregon

These top-rated financial advisors in Portland are 5-star all the way. They also offer a unique viewpoint and focus on community and sustainability that you won't find at all wealth management firms in other parts of the country.

Now that you've got a list of eight well-respected firms as a jumping off point, your next step would be to hone the list down further to approximately half that you may consider good contenders to handle your money and that you'd like to meet with.

Most Portland financial planning firms offer free initial consultations. To make your meeting with the firm as helpful as possible, you'll want to bring along the following:

- A list of your income and assets
- A list of your expenses and debts
- A list of your future goals and objectives
- A list of questions you have for the Portland financial advisors

After that initial meeting, you should have a better idea of which wealth management firm stands out to you and that you want to work with. Then it's time for them to take on the heavy lifting when it comes to your financial future and work to make it a prosperous one.

Rate Table Disclaimer

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

Image sources:

- <https://pixabay.com/photos/portland-oregon-train-station-depot-114335/>
- <http://www.confluencewealth.com/our-company/>

- <http://www.interactive-wealth.com/>
- <https://pixabay.com/photos/portland-pdx-oregon-northwest-2352754/>
- <https://vcmi.net/>