
Top 11 Best Financial Advisors in Franklin, Memphis, & Nashville, TN | 2019 Ranking

2019 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN NASHVILLE, FRANKLIN & MEMPHIS

2019's Top Financial Advisors in Nashville, Franklin, and Memphis, Tennessee

The state of Tennessee is famous for its music. It's home to both the Country Music Hall of Fame in Nashville and Elvis Presley's Graceland in Memphis.

While the area is a draw to music lovers, it's also home to nearly seven million residents, many of whom have their own dreams for the future, like an early retirement or dream home.

For those looking for expert guidance on growing their money to fuel their future goals, the top financial advisors in Memphis, Nashville, and Franklin, TN can help them do that.

Looking for a good Tennessee financial planner can be a daunting task at first. How do you know which firms fit you best? What should you look for when evaluating the best wealth management firms in Nashville or Memphis?

That's why we're here! AdvisoryHQ reviews the top financial advisory firms across the country to come up with a short list of the best in multiple cities.

So, all you have to do is read our ranking of the top financial management firms in Franklin, Nashville, or Memphis to choose the ones you feel would be the best fit. Then a meeting or two later, and you're on your way to choosing the best candidate and getting started on your financial path forward.

Read on to see who made our top ranking for Memphis, Franklin, and Nashville, Tennessee financial advisory firms in 2019 and learn what makes each a standout.



Award Emblem: Top 11 Best Financial Advisors in Memphis, Nashville, & Franklin, TN

Top 11 Best Financial Advisors in Nashville, Franklin, & Memphis, TN | Brief Comparison & Ranking

Financial Advisors in Nashville, Memphis, & Franklin	2019 Ratings
CapWealth Advisors, LLC	5
Family Wealth Management, LLC	5
Kraft Asset Management, LLC	5
Legacy Wealth Management	5
Red Door Wealth Management	5
Reliant Investment Management, LLC	5
Summit Asset Management	5
Waddell & Associates, LLC	5
Woodmont Investment Counsel, LLC	5
Abound Wealth	3
Silverleafe Capital Partners, LLC	3

Table: Top 11 Best Financial Advisors in Memphis, Nashville, & Franklin | Above list is sorted by rating

What's the Difference? Fee-Only vs. Fee-Based Tennessee Financial Planners

There are two terms that are important to know when you're evaluating the top wealth management firms in Franklin, Nashville, and Memphis, TN. The terms have to do with how a firm is paid, and they are:

- "Fee-Based"
- "Fee-Only"

It's important to know the difference between the two, because it informs how your account may be handled the financial advice you're given.

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



Top-Rated Financial Advisory Firms in Memphis, Nashville, & Franklin

Fee-Only Financial Advisors

A Tennessee financial advisory firm that states they are “[fee-only](#)” is letting you know that they do not accept any other form of compensation other than client fees.

This means they don’t accept any commissions or referral incentives from companies that sell financial products. This helps to significantly minimize any inherent conflicts of interest that come along with recommending and selling investment products.

A fee-only Nashville financial planner is in a better position to act solely in the interest of their clients and provide completely unbiased financial advice.

Fee-Based Financial Advisors

On the other hand, a firm that is “[fee-based](#)” does receive some direct compensation from clients but are also free to accept commissions or incentives from third parties who provide their financial products.

A fee-based structure can naturally create some potential conflict of interest, which is why many fee-based firms are also fiduciaries. Being a fiduciary helps to counteract the potential for conflict.

Wealth management firms in Nashville, Franklin, and Memphis that adopt a fiduciary commitment take on a legal responsibility to fully disclose any conflicts of interest and are required to put the interests of their clients ahead of their own.

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 Financial Advisors in Nashville & Memphis, TN

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

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

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

Click below for previous years' rankings:

- **2018 Review: [Top 10 Best Financial Advisors in Franklin, Memphis, & Nashville, TN](#)**
- **2017 Review: [Best 9 Financial Planners in Nashville & Memphis](#)**
- **2016 Review: [Top 9 Financial Advisors in Nashville & Memphis](#)**

CapWealth Advisors, LLC Review

Founded at the turn of the century, [CapWealth Advisors, LLC](#) is a top-rated financial advisory firm in Tennessee that's based just 15 minutes outside of Nashville, in Franklin, TN. CapWealth's specialty is in life-long preservation, growth, and distribution of assets.

It's an independent, [fee-based](#) wealth management firm in Franklin, TN, that specializes in working with high-net-worth clients. We've included it on our 2019 ranking for its innovative approach to simple financial management and their wide range of services.

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

Sophisticated Simplicity® Approach

CapWealth's Investment Committee oversees all asset management research. Those looking for innovation will appreciate the fact that this financial advisor in Franklin, TN has created its own [Sophisticated Simplicity®](#) model.

This unique model incorporates macro-economic data and analysis into a broad range of exotic, alternative, and private investment landscapes.

Independent discovery allows CapWealth to offer their clients the following:

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



2019's Best Wealth Management Firms in Tennessee

Broad Range of Services

Clients can greatly benefit by having multiple financial needs handled by the same expert financial advisor in Tennessee. CapWealth provides a full range of integrated financial services, each backed by the knowledge and expertise of the firm and its team.

This Franklin financial planner's service offerings include:

- Tax Planning: This wealth management firm in the Nashville area offers integrated tax planning and income tax design.
- Family Wealth Planning: This firm helps protect intergenerational wealth, trains younger generations about good stewardship, and promotes collaboration within the family.
- Investment Services: As you enter CapWealth's wide world of investments, you'll have the opportunity to work with your advisor to establish investment goals,

rebalance your portfolio, coordinate with other professionals, plan for insurance, and more.

- **Retirement Income & Distribution Planning**: A retirement plan through CapWealth covers all aspects of retirement, including an analysis of your current and future financial situation, ongoing reviews of IRA beneficiaries, tax-effective planning and asset management, and more.
- **Client Services & Communication**: Good communication is essential to financial success. Not only will you have access to cutting-edge information on the market, economics, and laws, you can also join in seminars on tax planning, estate planning, and other helpful financial topics.

Rating Summary

Their trademarked investment approach provides a lot of value for clients of CapWealth Advisors. Rather than just taking a static approach, this Franklin wealth management firm forges ahead with their own innovative path to quality investment management.

The firm is also nimble enough to handle multiple needs, and works with retirees and Millennials alike to help each with the financial needs pertinent to their life events.

With a customized process, wide range of services, and expert and attentive team, CapWealth Advisors earns a 5-star rating as a top financial advisor in Franklin, TN to consider partnering with this year.

Family Wealth Management, LLC Review

[Family Wealth Management](#) is a boutique financial planning firm in Nashville, TN that caters to individuals, families, and charitable organizations. Since 1998, it's been dedicated to providing multi-faceted financial opportunities to its clients.

The firm is a [fee-only](#) financial advisor in Nashville, Tennessee that takes a client-centered, straight-forward approach to wealth management.

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

Solid Philosophy

In all it does, Family Wealth Management is focused on a set of simple yet important driving philosophies which it incorporates into all its business practices. Clients benefit

from these philosophies, which are based on this Nashville wealth management firm's commitment to being:

- **Independent**: Being completely independent of any corporate control, you never need to worry that your financial guidance is being compromised due to a conflict of interest.
- **Integrated**: This Nashville financial advisor ensures all finances in different areas of your life are working together through a comprehensive, expertly curated approach.
- **Team-Based**: An expert and diverse team with longstanding ties to the firm and its community is at your service.

Custom-Tailored Experience

Each service offered by Family Wealth Management is meant to give you a completely customized experience.

The needs of each and every client coming through the door of this financial advisor in Nashville vary and, the firm ensures a personalized and unique approach to meet them.

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

- Portfolio management
- Income tax planning and compliance
- Wealth succession planning
- Family philanthropy
- Risk management
- Accounting and record keeping
- Ancillary management services

Rating Summary

Customers who like a personalized touch, will appreciate the boutique atmosphere at Family Wealth Management. Their expert team of Nashville financial advisors foster long-term relationships built on trust, transparency, and always working in your best interest.

With a fee-only commitment and comprehensive approach to financial planning, Family Wealth Management solidifies their 5-star rating as one of the best financial advisors in Nashville to consider partnering with in 2019.

Don't Miss: [Top Financial Advisors in Dallas, Texas \(Ranking of Dallas Wealth Advisors\)](#)

Kraft Asset Management, LLC Review

With a mission to give their clients confidence, reassurance, and peace of mind, [Kraft Asset Management, LLC](#) (KAM), a wholly owned subsidiary of KraftCPAs, has been serving clients since 2002 from their Nashville-based financial advisory office.

The firm is a [fee-only](#) Nashville financial advisor that believes in being focused on providing the best professional advice possible, rather than focusing on products. This ensures each portfolio addresses each client's distinct needs and goals.

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

Holistic Approach to Wealth Management

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

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

Clients that need a variety of financial services, can rest assured that the experts at KAM can assist them with the following wealth management challenges:

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

Talented Advisory Team

If you're looking for a well-trained team that is also up on all the latest industry knowledge, you'll appreciate these Nashville wealth managers.

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

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

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



Top Nashville Financial Planning Firms

Rating Summary

With services for individuals, business owners, and multi-family office support, Kraft Asset Management provides a full range of personalized services for multiple financial planning and wealth management needs.

They also have a strategic network that offers them access to experts in multiple areas of financial planning, which is a value-added resource for clients.

With an experienced team of leaders, a focus on their clients' well-being, and a fee-only structure, Kraft Asset Management earns a 5-star rating as one of the best financial advisors in Nashville, TN to consider partnering with this year.

Legacy Wealth Management Review

Guided by a mission to always put their clients first, [Legacy Wealth Management](#) is a top-rated Memphis financial advisory firm that's been serving clients since 1982. They serve a wide range of clients throughout the country and have a specialty in working with FedEx pilots.

The firm is a [fee-only](#), fiduciary wealth manager in Memphis who helps to simplify the complex world of investments and financial planning for their clients so they can just enjoy their lives.

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

Comprehensive Financial Planning

For many clients, the best financial advisors in Memphis are firms that offer a broad and diverse range of services.

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

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

Specialty Services for FedEx Pilots

Financial planning can be a complex matter when it comes to navigating contracts and benefits packages, especially for clients working within a particular career field. The Memphis financial planners at Legacy Wealth offer specialized financial planning for FedEx pilots, which includes:

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

This specialization in assisting FedEx pilots helps Legacy Wealth stand out from competing Memphis financial planners, due to their unique expertise in this area.

Additionally, the firm holds monthly, no obligation presentations to help FedEx pilots and their spouses better understand their corporate retirement packages, supporting financial literacy and more informed money decisions.

Rating Summary

Those seeking a top financial management firm in Memphis will find Legacy Wealth to offer a variety of robust wealth management services. This advisory team's commitment to always putting clients first is an additional benefit.

A unique statistic is that 98 percent of Legacy clients choose to stay with the firm, which says a lot for how well they manage money and treat their clients.

With a commitment to trust and transparency and a client-centered philosophy, Legacy Wealth Management solidifies their 5-star rating as one of the best financial advisors in Memphis to consider partnering with this year.

[Related: Top Financial Advisors in Kansas City, Leawood, and North Kansas City](#)

Red Door Wealth Management Review

Created through a strategic partnership with Memphis-based accounting firm, Cannon Wright Blount in 2010, [Red Door Wealth Management](#) works to grow and preserve wealth for their clients to ensure a lasting positive impact.

This top Memphis financial advisory firm is [fee-only](#) in order to reduce any potential conflicts of interest. Red Door provides expert wealth management to individuals, families, retirement plans, and business owners.

Key Factors That Enabled Red Door Wealth Management to Rank as a Top Memphis Financial Advisor

Wide Range of Financial Planning Services

Clients looking for a Memphis wealth management firm that can offer services for multiple areas of their financial life, will find a wide range of offerings from Red Door. They look at financial planning through a “wide lens” in order to develop strategies for a comfortable present and goal-oriented future.

Whether you are working to manage an estate, trying to save for a successful retirement or looking to mitigate risk through insurance, the Memphis financial advisors at Red Door can address a multitude of needs.

Their comprehensive financial planning services include:

- Family & Small Business Consulting
- Investment Services
- Retirement Planning
- Education Planning
- Charitable Gift Planning
- Estate Planning
- Income Creation
- Cash Flow Management
- Pension, Deferred Compensation & Stock Option Planning
- Insurance Needs Analysis
- Tax Minimization Strategies
- Accounting & Bill Pay
- Liability Management
- Risk Analysis



Top Financial Advisory Firms in Memphis, Tennessee

Unique Investment Philosophy

The top Memphis financial advisors at Red Door Wealth Management don't just take a cookie-cutter approach to managing your investments. They use a philosophy that focuses on both global and domestic market trends to make strategic, customized recommendations.

The approach of this investment management firm in Memphis, TN is three-pronged to better serve their clients and offer them a depth to their financial portfolios that few top-rated Tennessee financial advisory firms can match.

Their three-pronged approach includes:

- Combining their knowledge of the world's economies with fundamental analysis
- Measuring market temperature with a wide range of technical indicators
- Using an Investment Advisory Board to provide intimate, real-time insights into economy-driving industries

Rating Summary

The team at Red Door believes in taking the time to build long-term relationships founded in trust and respect. Clients looking for peace of mind for their family, will find these Memphis financial planners go the extra mile to help them plan for a successful future.

With a full range of services, including accounting, a fiduciary commitment, and fee-only dedication to always acting in their clients' best interests, Red Door Wealth Management scores a 5-star rating as one of the best financial advisors in Memphis to consider working with in 2019.

Reliant Investment Management, LLC Review

Founded in 1986, [Reliant Investment Management, LLC](#) is a SEC regulated Registered Investment Advisor (RIA) with offices in Memphis, TN and Shreveport, LA. They believe in providing expert and objective solutions based upon diversified strategies.

Reliant doesn't explicitly state whether they are fee-only or fee-based. However, they are [likely fee-only](#) as they state that they don't accept commissions. As always, we recommend verifying fee structure before contracting with any Nashville, Franklin, or Memphis financial planners.

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

Experienced & Independent Team

The team at Reliant boasts over 125 years of combined experience in disciplined and expert portfolio management. Principals at this Memphis wealth management firm also hold several community affiliations, including activities such as public speaking and holding seats on a variety of committees.

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

Additionally, this Memphis financial advisor prides itself on following the principals of consistency, customization, efficiency, and service.

Services for Clients

As a top-rated Memphis financial advisor, Reliant caters to an impressive range of clients, offering personalized investment management strategies for those in the public, institutional, and private sectors.

A few examples of clients served within these groups include:

Public Clients

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

Institutional Clients

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

Private Clients

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

Rating Summary

Clients looking for personal attention and customized, smart investment strategies will enjoy working with the expert team at Reliant. They take a disciplined approach to investing, using time-proven strategies to build high-quality portfolios.

With a focus on independent research, a customer-centric philosophy, and a “no commissions” commitment to accountability, Reliant Investment Management solidifies their 5-star rating as a top Memphis financial advisor to consider partnering with this year.

Popular Article: [Top Financial Advisors in Greensboro, Chapel Hill, and Winston-Salem, North Carolina](#)

Summit Asset Management Review

Deeply rooted in the community, [Summit Asset Management](#) is a top-rated financial advisor in Memphis, Tennessee that’s been providing expert financial guidance since 1991.

They are a [fee-only](#) wealth manager in Memphis, TN, whose mid-sized structure allows them to both have a deep bench of professionals and also keep a personal touch. Summit is 100% employee owned, meaning less potential conflict of interest.

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

Investment Management at a Glance

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

After a portfolio is set into action, the Investment Committee monitors performance continuously and recommends changes when necessary. Each portfolio takes the following factors into account:

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

Summit's most often utilized asset classes include:

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

Comprehensive Financial Planning

Creating a custom-tailored financial plan takes insight, expertise, and dedication on the part of your financial advisor.

Through a coordinated approach, these Memphis financial advisors work together with the client to create a long-term plan for the family, business, or non-profit sector.

Typical areas of financial planning include:

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



2019 Best Memphis, Nashville, & Franklin Wealth Management Firms

Rating Summary

Summit Asset Management has a strong commitment to providing completely conflict-free advice and keeping all recommendations solely focused on their client's needs. They believe in providing exceptional service, not selling products.

Their long-standing ties to the community reflect their goals to form long-term relationships with their clients to help them achieve financial success for a lifetime.

With an expert and attentive team and a comprehensive approach to wealth management, Summit Asset Management earns a 5-star rating as one of the best Memphis financial advisors to consider partnering with in 2019.

[Read More: Best Financial Advisors in Seattle, Bellevue, Kirkland \(Washington State\)](#)

Waddell & Associates, LLC Review

Offering expertise and intellectual capital without restriction, [Waddell & Associates, LLC](#) (W&A) is a top financial advisory firm with offices in Memphis and Nashville, Tennessee. They believe in treating their clients like family and building long-term relationships.

The firm is a [fee-only](#) financial advisor in Nashville and Memphis that has three key goals when providing financial guidance to clients, to improve their lives, provide clarity, and remove fear.

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

The Investment Compass

This Nashville wealth management firm refers to its investment philosophy as its "compass." While it offers direction during difficult times, this principle-driven compass is also an asset during stable times, because it provides a north star to keep the firm and its clients on track.

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

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

Dedicated Client Services

Clients looking for a full range of financial services, will find W&A offers just about everything they could need. This Nashville/Memphis wealth management firm provides flexibility within the following services:

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

Additionally, W&A employs the following investment vehicles to diversify and reduce risk in each client's investment portfolio:

- Individual securities
- No-load mutual funds
- Municipal bonds

- Exchange-traded funds (ETFs)
- Money market funds and CDs
- Corporate bonds
- US treasury bonds

Rating Summary

If you enjoy walking into your financial advisor's office and being treated like family, then Waddell & Associates will be a great fit. They believe in taking the time to get to know each client and all aspects of their financial life so they can steer them in the right direction and help them secure a sound future.

With high ethical standards for all associates, an experienced team, and foundation of trust and transparency, Waddell & Associates is one of the best financial advisors in Nashville to consider partnering with this year and earns a 5-star rating.

Woodmont Investment Counsel, LLC Review

Blending cutting-edge technology with sophisticated investment advice, [Woodmont Investment Counsel, LLC](#) is a top Nashville, TN financial advisory firm. They provide “client-first solutions” to high-net-worth individuals, families, institutions, endowments, foundations, and trusts

Woodmont is an independent [fee-based](#) Nashville wealth management firm that was founded in 2000. They are included on our list because of their fiduciary commitment to the client and personally tailored strategies.

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

An Experienced Investment Team

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

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

Complimenting their varied experience, the team of Nashville financial advisors at Woodmont also hold several professional certifications and designations, which include:

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

Each client working with Woodmont benefits from the expertise and industry knowledge of these Nashville financial advisors.



Nashville's Best Financial Advisory Firms

Tailored Approach to Client Services

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

Each portfolio generally consists of a custom blend of equities, fixed income, and, when called for, alternative investments. Portfolios are monitored regularly, and clients always remain well-informed about the progress of their investments.

Clients of this Nashville wealth management firm can rely on:

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

As one of the top wealth management firms in Nashville, Woodmont Investment Counsel uses a client-centered philosophy that matches everything they do to the objectives and needs of each client.

Rating Summary

For those that like the personal touch of a boutique Nashville wealth management firm, Woodmont Investment Counsel will be a great fit. They pride themselves on using a collaborative, team-based approach to develop custom financial strategies.

With proactive communication, an experienced team, and sophisticated wealth management plans, Woodmont Investment Counsel scores a 5-star rating as one of the best wealth management firms in Nashville to consider partnering with this year.

Related: [Top Financial Advisors in New York, NY – Ranking & Comparison](#)

About Wealth Review

Focused on providing simple and smart financial guidance, [Abound Wealth](#) is a top-rated wealth management firm in Franklin, TN. They work to help their clients create abundance in their lives through expert financial management.

Abound Wealth is a [fee-only](#), fiduciary financial advisor in the Franklin and Nashville area that emphasizes low cost, low taxes, and longevity and they recognize that success is about more than money.

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

Fee-Only Wealth Management Firm

People don't mind paying more for expert financial advice, however, don't want to pay top dollar for someone to just sell them a product that does not work in their best interests. This is all too common in the financial industry, but it's something that Abound avoids.

The top-rated financial advisors at Abound Wealth work with a fee-only structure. This means the firm only receives compensation via the fee you pay them, and that fee is usually a percentage of the assets they manage for you.

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

Additionally, the firm is a fiduciary, taking on a legal obligation to always be completely transparent and to act in their client's best interest at all times.

Simple and Smart Wealth Management

This wealth management firm in the Nashville area offers what it calls simple and smart financial advice. Their mission is to provide a safe haven for people looking for intelligent, straight-forward wealth management that is free from sales pitches and quotas.

Their Nashville-area financial advisors work for clients and don't have any outside influences based on incentives from third parties. They believe in acting as a "personal CFO" for clients by helping them manage every area of their financial lives.

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

The firm also takes advantage of technology, working with clients either locally or virtually, bringing their financial advice to wherever they are whether it's in Nashville, Memphis, or across the country.

Rating Summary

Abound Wealth is a great fit for those new to investing with their un-complicated approach to wealth management. This Franklin, Tennessee financial advisor also hosts a bi-weekly podcast to demystify everything financial, called The Money Guy Show.

Although Abound Wealth is certainly a top financial advisor in Franklin, TN, with a lot to offer, our review did find an opportunity for improvement with how the firm's financial planning services are communicated. For this reason, we've given them 3-stars.

There are few clear descriptions of the types of financial planning or investment management services provided by Abound, which means that potential clients may find it difficult to fully evaluate the firm.

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

See Also: [Top Financial Advisors in Denver, Colorado Springs, and Boulder \(Colorado\)](#)

Silverleaf Capital Partners, LLC Review

With a low client-to-advisor ratio, [Silverleaf Capital Partners, LLC](#) is a Memphis-based top financial planning firm founded in 2004. The firm strives to provide a personalized boutique experience and work completely in the service of their clients.

The firm is an independent [fee-only](#) Memphis financial advisor that believes in taking a team-based approach. Their seasoned team has over 60 years of combined experience in the financial industry.

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

Family Office Approach

Silverleaf Capital offers their family office clients unique access to virtual resources, allowing families to be better served by their own virtual investment firm. Through their innovative cloud-based tools, this Memphis wealth management firm offers clients total control and visibility of their wealth.

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

Talented Advisory Team

Although the team at Silverleaf Capital Partners may be smaller than that of competing Memphis financial advisors, the advisors have decades of experience and expertise, and they purposely keep their client-to-advisor ratio low for personalized service.

Certifications held by their team include:

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

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



Top-Rated Financial Advisors in Tennessee

Rating Summary

Silverleaf Capital Partners gives clients the boutique structure and personalized attention that's not always found at larger Tennessee wealth management firms. Their fee-only structure also ensures that their guidance is free of any hidden agendas.

In comparison to competing Nashville and Memphis advisors, however, Silverleaf does have an opportunity for improvement when it comes to how their services are communicated.

We've rated them with 3-stars due to the lack of more specific information about their investment philosophy or portfolio designs, which may make it difficult for new clients to fully evaluate their capabilities.

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

Conclusion – 2019 Best Financial Advisors in Nashville, Franklin, and Memphis, Tennessee

Whether you prefer a smaller, personal atmosphere or a virtual one at your chosen Nashville, Memphis, or Franklin, TN wealth management firm, these top firms on our ranking can provide a good fit for multiple individuals and organizations.

Your next step on the path of finding a guidance to manage your money and meet your current and future goals would be to narrow down this list of the top 11 best financial planning firms in Tennessee to 3 or 4 that you'd like to meet and learn more about.

A face-to-face meeting can help you gain insight into the firm and also into your current financial situation and the direction they feel you should take to help reach your future dreams and objectives.

After that last step to evaluate your favorite Nashville, Franklin or Memphis wealth management firms, you should get a feel for your best choice and can then turn over the work to your new financial partner who will help you preserve and grow your assets for years to come.

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/graceland-memphis-tennessee-gates-395039/>
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