
Top 9 Best Financial Advisors in Seattle & Bellevue, WA | 2019 Ranking

2019 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN WASHINGTON STATE

Finding 2019's Top Financial Advisors and Wealth Managers in Seattle & Bellevue (Washington)

Seattle and nearby Bellevue Washington offer a rich landscape of ocean, mountains, and evergreen forests. The array of top Seattle financial advisors can be just as diverse when it come to the services and expertise they provide.

If you're like most people, you most likely have goals that you're saving for, such as funding a child's education or ensuring a comfortable retirement. While it can be done on your own, the help of an expert can definitely help you achieve your goals sooner.

What are some of the things that you should look for in Seattle's top-rated wealth management firms? You'll want to ensure they're trustworthy and can tailor their solutions to meet your needs, for starters.

A financial advisor is someone you'll hopefully be working with for decades to keep you on the right financial path, so finding the best one for your financial situation, personality type, and future needs takes some time to ensure a good fit.

We've worked to make your search for a top financial planning firm in Washington state easier by ranking the top 9 firms in Seattle and Bellevue.

This gives you a "short list" of the best of the best firms in the state, saving you time finding your perfect Bellevue or Seattle wealth management firm. From this list you can read through a summary of each firm to choose a few that you'd like to meet in person.

We've also included some tips on what you should look for in a financial advisor and how to choose the one that fits your needs best.



Award Emblem: Top 9 Best Financial Advisors in Seattle & Bellevue (Washington State)

Top 9 Best Financial Advisors in Seattle & Bellevue, Washington in 2019 | Brief Comparison & Ranking

Top Wealth Management Firms in Washington State	2019 Ratings
Avier Wealth Advisors	5
Boone Wealth Advisors	5
Brighton Jones, LLC	5
EP Wealth Advisors	5
Goddard Financial Planning	5
Laird Norton Wealth Management	5
Sovereign Wealth Advisors	5
Filament	3
Merriman Wealth Management, LLC	3

Table: Top 9 Best Financial Advisors in Washington State | Above list is sorted by rating

Tips for Finding the Best Bellevue & Seattle Financial Planner for You

When you first begin looking for a good financial advisor in Seattle or Bellevue, Washington, many firms may seem very similar because they offer key core services like investment management and financial planning.

But on closer look, you'll start to see clear differences between them, and those differences can help you zero in on the firm that best meets your needs and will be a good match for your financial goals.

Here are some important factors to look for as you're reviewing this list of the top-rated Seattle wealth management firms.

Fee Structure

It's important to know the difference between the two fee structures, "fee-only" and "fee-based." They inform how a firm is compensated and how you'll feel about their financial advice.

Fee-only Seattle financial advisors are firms that only accept client fees as compensation and do not accept any commissions or incentives from companies that sell financial products. This takes away a big potential for conflict of interest and frees the advisor to make suggestions completely in your best interests.

Fee-based advisors do accept commissions or incentives from the sales of financial products. Because this structure has an inherent conflict of interest, you want to look for a fee-based Seattle financial advisor to also be a fiduciary.

A fiduciary takes on a legal obligation to always act in the client's best interest, regardless of any commissions, which helps alleviate any conflict.

Investable Asset Minimum

Certain Washington state wealth management firms will have a minimum investable asset level for clients they work with. Some firms work with all wealth levels and others only with high-net-worth clients. This factor can immediately rule a firm in or out for you.



Top Financial Advisors in Seattle, Washington

Specialties of the Firm

Is retirement your biggest financial concern? Then you'll want to gravitate towards the top Bellevue and Seattle financial planning firms that specialize in retirement planning.

Are you a small business owner and would like both personal and business financial services? Look for a financial advisor that specializes in working with entrepreneurs and business owners.

Specialties, as well as depth of services that are offered, is another factor you can use to narrow down your list of acceptable candidates.

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 Seattle & Bellevue in 2019

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

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

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

Click below for previous years' rankings:

- [2018 Review: Top 8 Best Financial Advisors in Seattle & Bellevue, WA](#)
- [2017 Review: Top 10 Best Financial Advisors & Planners in Seattle, Bellevue, & Kirkland](#)
- [2016 Review: Top 10 Best Investment Management Firms in Seattle, Bellevue, & Kirkland](#)

Avier Wealth Advisors Review

Taking an integrated and collaborative approach to financial planning, [Avier Wealth Advisors](#) is a top-rated Pacific Northwest financial advisor with offices in Bellevue, WA and Lake Oswego, OR.

The firm is a [fee-only](#) Seattle area financial advisor that believes in a transparent process that includes honest communication and earning their clients' trust every day. Client education is an important focus that Avier fosters throughout the wealth management process.

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

Talented Team

Clients working with this top Bellevue wealth management firm, have the benefit of being supported by a three-person advisory team, adding additional valuable insight into your financial strategy.

Avier boasts a robust team of financial advisors with a wide range of industry-recognized credentials and certifications. These include:

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

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

Along with their commitment to maintain a low advisor-client ratio, the Bellevue financial advisors at Avier have the ability to set their clients up for success through industry expertise and individualized attention.

Women & Investing

In addition to its team-based services and comprehensive approach, Avier Wealth Advisors is committed to seeing women succeed. This Washington state wealth management firm helps facilitate financial education and independence for women at every stage of life.

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

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



2019 Best Wealth Management Firms in Washington

Rating Summary

The focus on financial education to help clients become an active participant in their financial success is a specialty that helps Avier stand out from other Seattle and Bellevue financial advisory firms.

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

With a fee-only and fiduciary commitment, an attentive and well-educated team, and a focus on transparency, Avier Wealth Advisors solidifies a 5-star rating as one of the best financial advisors in Bellevue to consider partnering with this year.

See Also: [Best Financial Advisors in Minneapolis, St. Paul, and Edina \(Minnesota\)](#)

Boone Wealth Advisors Review

Providing seasoned financial guidance and investment advice, [Boone Wealth Advisors](#) is a client-driven wealth management firm in Bellevue, Washington that's been serving their clients for over three decades.

The firm is a [fee-only](#) financial advisor in the Seattle area that believes in putting the client at the center of everything they do. It distinguishes itself by providing a high level of customer care and personal attention.

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

Talented Advisory Team

For those individuals that prefer to work with a smaller, boutique firm for more hands-on financial guidance, this team of advisors at Boone will be a great fit.

While it may be smaller than competing financial advisory firms in Bellevue, its investment management and financial planning professionals bring decades of experience and are well-credentialed. Some of their industry certifications include:

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

These designations come with strict requirements for fiduciary duties and ongoing industry education, ensuring that clients receive financial guidance that is both unbiased and well informed.

Independent Financial Planning

A financial advisor in Washington can help you go use the assets you have wisely to fuel your dreams. Properly managing your money can help ensure your future financial security.

One of the Bellevue financial planners at Boone Wealth Advisors can help you with a comprehensive plan based upon your assets, risk tolerance, and objectives. Their process of planning your financial strategy includes:

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

Planning for your financial freedom and security in retirement is one of the best things you can do with your current wealth, the advisors at Boone offer multiple ways to help you through your choice of a variety of services.

Private Wealth Management Services

Boone Wealth Advisors offers private Bellevue wealth management with a broad selection of funds and special access to unique share classes. These Seattle area financial planners can also reduce the amount of transaction fees paid through smart wealth management strategies.

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

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

Rating Summary

Boone Wealth Advisors has a passion for serving its clients and strives to guide them through all financial aspects of their life journey. This advisory team believes in “eye-to-eye” relationships and taking the time to get to know their clients and their future dreams.

Boone Wealth Advisors has been named a Five-Star Wealth Manager by Seattle Magazine and One of America’s Top 1,000 Advisors by Barron’s Magazine.

With a well-seasoned team, a focus on building personal relationships, and an independent, fee-only structure, Boone Wealth Advisors earns a 5-star rating as one of the best financial advisors in Bellevue for clients to consider partnering with in 2019.

[Don't Miss: Top Financial Advisors in Lexington & Louisville, Kentucky | 2017 Ranking | Kentucky Wealth Management Firms](#)

Brighton Jones, LLC Review

With a collaborative approach that looks at a client’s entire balance sheet, [Brighton Jones, LLC](#) is a top-rated Seattle financial planning firm with additional offices in Portland, OR, San Francisco, CA, Scottsdale, AZ and McLean, VA.

This [fee-only](#) financial advisor in Seattle is also a fiduciary and believes in a community environment and cultivating a culture of connectivity outside of the office. Beyond just your financial peace of mind, Brighton Jones cares about your happiness.

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

Personal CFO Services

For clients that want a comprehensive approach to wealth management and someone to be at their side, Brighton Jones offers Personal CFO Services. Their services cover a wide variety of financial needs and goals through all areas of your life journey.

Services provided by the Seattle wealth management professionals at Brighton Jones include:

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



Seattle's Top-Rated Financial Planning Firms

Expert 401k Advisors

Owning a business can have unique financial complexities, especially when it comes to managing employee benefits packages.

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

The Seattle financial advisors at Brighton Jones have a wide range of experience providing fiduciary advice for executive compensation and benefits packages, including for past clients, such as Amazon, Boeing, Microsoft, and Starbucks.

Rating Summary

Brighton Jones has an excellent track-record working with both individual and business clients. These advisors focus on results and at ensuring all their clients needs and objectives are reflected in their well-crafted financial strategies.

Brighton Jones' fee-only structure and fiduciary commitment to trust and transparency give their clients peace of mind knowing all advice given is completely objective and without any hidden agendas.

With a client-focused approach, expert & instructional team, and wide range of services, Brighton Jones earns a 5-star rating as one of the best financial planners in Seattle to consider partnering with this year.

EP Wealth Advisors Review

With a goal to simplify its clients' financial lives, [EP Wealth Advisors](#) is a top Bellevue, Washington financial advisory firm with seven additional offices in California and two in Colorado. They believe in the principals of transparency, purpose, and simplicity.

The firm is a [fee-only](#) wealth manager in Bellevue that believes in close collaboration with its clients to help them not only reach their financial goals and objectives but also to additionally fulfill their aspirations.

Key Factors That Enabled EP Wealth Advisors to Rank as a Top Seattle Wealth Management Firm

Peace of Mind Planning Model

Anyone that is anxious about the thought of going through all their financial information to come up with a strategy for the future will appreciate the focus EP Wealth Advisors puts on peace of mind.

These top Seattle area financial advisors use a “Peace of Mind Planning Model” as a cornerstone for their wealth management process. This model is designed to simplify financial planning and help make the process as easy and straight-forward as possible.

This planning model includes the following steps:

- Discover: These Bellevue financial planners take time to get to know you and your family ambitions to craft a personalized plan.
- Prioritize: You receive your customized financial plan to review, which organizes your finances and offers a firm financial foundation for the future.
- Implement: The Bellevue financial advisors at EP work with you to put your plan into action, which is based upon a focused, resilient portfolio.
- Monitor: To limit surprises, your strategy is continually monitored, and you are kept informed of the progress and how your plan is meeting your goals.

Retirement Planning

Planning for retirement is a key objective of many investors. The Bellevue financial advisors at EP Wealth Advisors can help with a comprehensive and well-crafted plan to ensure your finances are ready when you reach your desired retirement age.

These expert financial planners in the Seattle area understand that three key areas need to be balanced when planning for retirement. They are:

- Maximizing your enjoyment of retirement
- Managing the risk of outliving your income
- Managing the risk of unexpected life events and market fluctuations

They offer a very robust set of retirement planning strategies, making them an excellent Washington financial planner for anyone focused on retirement. Their strategies include the integration of:

- Investment Management
- Tax Planning
- Social Security Optimization
- Pension Planning
- Real Estate Investments

- Life Insurance and Annuities
- Insurance Analysis - Medicare and/or Long-term Care

Rating Summary

From life transition planning to financial education to tax-efficient investing, the experts at EP Wealth Advisors can provide you with a tailored strategy to reach your financial goals. Their wide array of services ensure they can handle just about any type of financial need.

Additionally, the Bellevue financial advisors at EP Wealth Advisors hold a number of industry credentials and the firm has a deep bench of talent and expertise from which to draw from.

With a commitment to trust and transparency, a specialty in retirement planning, and an “Investing in Women” initiative, EP Wealth Advisors scores a 5-star rating as one of the best financial advisors in Washington state to consider working with in 2019.

Related: [Top Financial Advisors in St. Louis, MO](#)

Goddard Financial Planning Review

With a focus on transparent pricing and a flexible approach, [Goddard Financial Planning](#) is a Seattle-based wealth management firm that helps clients in all stages of life, from just starting out to those seeking to protect and pass on their assets.

The firm is a fiduciary and also a [fee-only](#) Seattle financial advisory firm that offers hourly rates for their services, enabling clients to purchase just the amount of financial planning they need.

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

Wide Range of Financial Capabilities

Individuals seeking several different financial services will benefit from the depth of expertise at Goddard. These top-rated financial advisors in Seattle excel at providing clients with a variety of options when it comes to improving their financial health.

Each service corresponds to a unique hourly bracket based on the complexity of advice needed. Some of the financial services offered include:

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



2019's Best Financial Planning Firms in Seattle & Bellevue, WA

Long-Term Relationships

Goddard Financial Planning isn't just here to give you some advice and send you on your way, these Seattle financial planners seek to form long-term, ongoing relationships with their clients.

After their initial financial plan has been drafted and approved, clients of this top wealth management firm in Washington have no limits on how often they can consult with their advisors.

Annual meetings to make modifications to strategy and track progress are available to clients who want them. Some of the items covered during these annual meetings include updating current financial assets and rebalancing portfolios.

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

Rating Summary

Goddard Financial Planning offers a welcoming environment to people of all wealth levels who are seeking expert financial guidance to help them reach their goals. Their expertise also ranges across a variety of financial needs from maximizing Social Security to choosing the best portfolio products.

Their unique hourly-rate fee structure gives clients the flexibility to control how much they spend on financial planning, and the guidance of four general brackets that note the types of services that correspond to a particular number of financial planning hours.

With a fee-only structure, a fiduciary commitment to always put their clients first, and a diverse and knowledgeable team, Goddard Financial Planning solidifies their 5-star rating as one of the best financial advisors in Seattle to consider partnering with this year.

Laird Norton Wealth Management Review

[Laird Norton Wealth Management](#) is a top financial advisory firm in Seattle, Washington that was founded by clients for the benefit of clients. Since 1967, the firm has been serving high-net-worth families, individuals, foundations, and endowments.

The firm is a [fee-only](#) Seattle wealth manager that upholds a fiduciary commitment to always act in the client’s best interests and have complete fee transparency.

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

Full-Service Firm

Laird Norton prides itself on being a premier Seattle financial advisory firm offering a full range of services to meet a variety of financial needs.

Clients benefit from getting multiple financial needs met under one roof and having them integrated to all work together to achieve their financial goals. Services offered by this top-rated financial planning firm include:

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

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

Additionally, its larger team size means that Laird Norton can provide additional attention and benefits that may be otherwise unavailable to investors, such as negotiated discounts on investments and preferred pricing.

Expertise in Estate Transfers

From their many decades of experience working with high-net-worth clients, the advisors at Laird Norton are fully knowledgeable of the ins and outs of maximizing wealth transfer between generations.

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

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

Rating Summary

Clients looking for a firm with a long and distinguished track record of serving high-net-worth clients will find Laird Norton to be an excellent option. Their expertise in the complex financial planning of wealthy individuals and families helps ensure a long-lasting and prosperous relationship.

Additionally, the firm is committed to thought leadership and financial education for their clients and regularly holds Thought Forum™ workshops and presentations.

With a client-centric philosophy, a wide range of financial planning services, and a track record of success, Laird Norton Wealth Management earns a 5-star rating as one of the top Seattle investment firms to consider partnering with in 2019.

Popular Article: [Top Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee](#)

Sovereign Wealth Advisors Review

With a belief that everyone should have access to personalized and unbiased financial advice, [Sovereign Wealth Advisors](#) is an independent Bellevue, WA wealth management firm that's been serving clients throughout the Pacific Northwest for over three decades.

The firm does not clearly state whether they are fee-only or fee-based, however their [ADV](#) indicates that they are only compensated by a percentage of assets under management, hourly charges, or fixed fees, and do not receive any commissions or performance-based fees.

This would point to the firm being fee-only, however we always recommend that you confirm a financial advisory firm's fee structure before contracting with them for their services.

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

Comprehensive Services

This Bellevue-based top-rated financial planning firm works with clients of all wealth levels, serving families and individuals, small business owners, and corporate-sponsored retirement plans.

Their wide range of financial services provides clients the value of filling several financial needs with the same advisory team and having their financial strategies integrated toward the same goals and objectives.

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

- Social Security and Medicare analysis
- Tax, estate, and legacy coordination

- Asset protection
- Stock option analysis for senior executives
- Business succession and continuation planning
- Analysis and coordination of illiquid assets
- Analysis of real estate holdings and transactions



Top Wealth Management Firms in Bellevue & Seattle, Washington

Wealth Building

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

The process of creating such a portfolio is highly personalized and designed to bring clients comfort and peace of mind that their assets are safe and in good hands. Their services in this area are extensive and include:

- Customized portfolio management
- Portfolio review and risk assessment
- Account rebalancing and reviews
- Tax-efficient portfolio strategies
- Covered call strategies
- Individual bond selection

- Private equity holdings
- Control and monitor investment expenses
- Institutional consulting to retirement plans, corporations, foundations, and endowments
- Company 401k, 401A, 403b, and retirement plans

Rating Summary

The Bellevue financial advisors at Sovereign Wealth Advisors use a holistic process to wealth management to help link client visions to executable strategies. They bring several resources to the table to help clients achieve their wealth ambitions.

These financial advisors in Washington state uphold a fiduciary standard that requires they put their client's best interests ahead of their own and are transparent about all fees and compensation.

With a robust set of financial planning services, a welcoming atmosphere to all levels of wealth, and an experienced and attentive team, Sovereign Wealth Advisors scores a 5-star rating as one of the best financial advisors in Bellevue to consider partnering with this year.

[Read More: Top Financial Advisors in Dallas, Texas \(Ranking of Dallas Wealth Advisors\)](#)

Filament Review

Providing independent, innovative, and illuminating wealth management, [Filament](#) is a Seattle financial advisor that works to light a path for their clients through a sometimes tumultuous market atmosphere.

The firm is a [fee-only](#) Seattle financial planner that works with a wide range of clients whom they describe as effective delegators, restful sleepers, serious thinkers, and difference makers.

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

Talented Team

Filament offers a boutique experience with a “big firm talent.” Their team of experienced Seattle financial advisors work to successfully guide their clients through a number of life situations that can impact their financial health to keep their future goals on track.

Their team includes advisors with decades of experience in areas such as multi-generational wealth transfer, tax planning, investment portfolio design, and more.

Their team also holds the following educational and industry designations:

- CFA® (Chartered Financial Analyst®)
- MBA (Master of Business Administration)
- CPA (Certified Public Accountant)

Seeing the Big Picture

The top-rated Seattle financial advisors at Filament believe in taking a look at the big picture so all facets of your financial life can be balanced according to priorities and opportunities.

Their comprehensive family office services are designed to be tailored to each client's specific needs, and adjusted as life changes happen, such as a change in marital status, a new family member, or an unexpected life event.

Some of the integrated financial planning services that this Seattle, Washington firm offers include:

- Goal setting
- Financial analysis & modeling
- Philanthropic counsel
- Independent investment counsel
- Investment and financial reporting & monitoring
- Coordination of tax, estate, and investment planning
- Cash management
- Coordination of your relationships with third-party services (such as insurance agents or bill payment)
- Other counsel as required

Rating Summary

Individuals and families looking for a comprehensive and integrated approach to wealth management and financial planning will appreciate the straight-forward and illuminating approach of Filament.

While the firm is a top-rated Seattle area financial advisor, our review did find them lacking in the information provided about their services and the navigation of their website, which looks dated. These items can make it difficult for potential clients to fully evaluate the firm. For these reasons, we've scored Filament with 3-stars.

By adding more detail about their services and benefits and updating their website to make it more user-friendly, Filament could easily improve their rating among the top Seattle & Bellevue financial advisors and their value proposition to prospective clients.

Merriman Wealth Management, LLC Review

Providing an all-encompassing approach to financial management, [Merriman Wealth Management, LLC](#) is a Seattle, Washington financial planning firm that has additional offices in Spokane, WA and Eugene, OR.

This [fee-only](#) wealth management firm in Washington state was founded in 1983 and believes in treating clients as family. Their investment philosophy is grounded in decades of academic research and relies on objective data, rather than emotions.

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

Five-Step Process

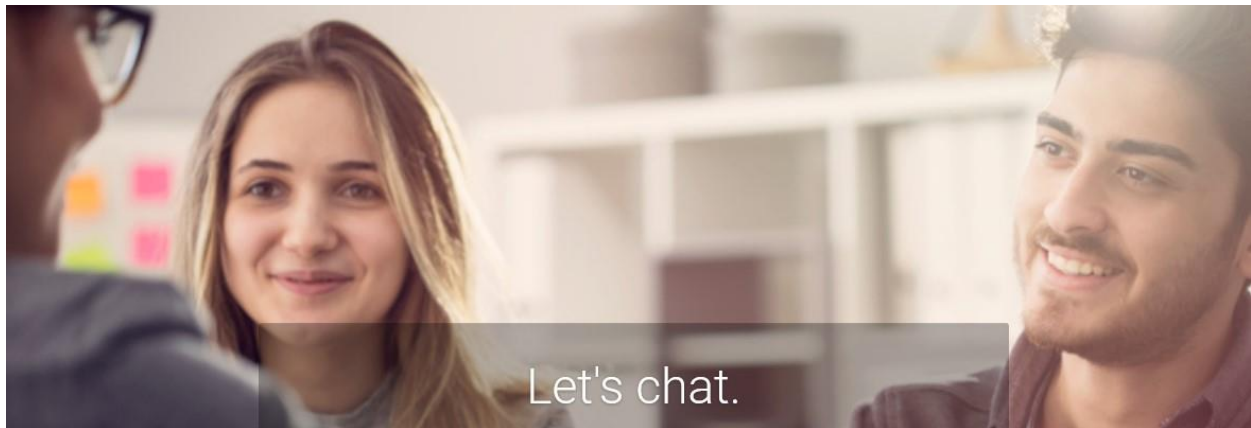
Merriman has a comprehensive five-step process that starts with a discovery meeting in which advisors get to know their clients' relationships, values, goals, resources, health, and interests.

After the initial discovery meeting where they learn all about you comes a strategy meeting where a custom investment plan is created with expert advice given by Merriman's experienced staff of financial planners in Seattle.

An implementation meeting is next. Here, any final questions are addressed by your Seattle financial advisors before the implementation of your customized plan begins.

An advanced plan meeting is next, followed by regular progress meetings to ensure that clients remain on track towards their financial objectives.

Merriman's straight-forward, multi-step program offers its clients peace of mind while simultaneously ensuring forward movement towards their financial goals.



Top Seattle, WA Financial Advisory Firms

Comprehensive Portfolio Strategies

One of the biggest values that this Seattle wealth management firm offers its clients is the ongoing assessment of each client's goals, needs, resources, and decisions. They don't just give you a portfolio and then move on, they're there with you to continually monitor progress and adjust as needed.

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

- MarketWise: This is the most widely used strategy. Assets are allocated and rebalanced across asset classes using a carefully selected mix of low-cost mutual funds.
- TrendWise: This is an actively managed strategy that applies proprietary quantitative models to invest globally and across asset classes (primarily ETFs).

Rating Summary

Merriman Wealth Management believes in a collaborative process that incorporates multiple factors of a client's financial life, including investments, taxes, insurance, and more. Their mission is to free up time for their clients to do the things they love and live fuller lives.

However, with there was little information available about the specific details of their [comprehensive wealth management approach](#), including strategies for taxes, insurance, and charitable giving. This could cause new clients to have difficulty when evaluating the firm's full range of capabilities. Thus, we've rated them with 3-stars.

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

Conclusion: 2019 Top-Rated Bellevue & Seattle Wealth Management Firms

The Seattle and Bellevue area of Washington is rich with many natural resources and it's also home to many of the best financial advisory firms in the Pacific Northwest.

Now you that you have your short list of firms to choose from, your next step would be to decide on perhaps three to five firms that you'd like to potentially work with and schedule introductory meetings to get to know them.

To get the most out of your introductory meeting, which is complimentary at many of the best Seattle area financial planning firms, bring the following information with you:

- Your assets and income
- Your debts and expenses
- Your tax and insurance details
- Your main goals for the future

Your consultation with a top-rated Seattle wealth management firm will allow you to gain more personal insight into the firm and their advisors and get a feel for whether they are a good fit for your needs.

After this meeting process, you should land upon the financial advisor in Washington state that is a perfect fit. Once you've chosen your financial planner, you can look forward to a bright future with an expert helping guide you to grow your wealth and reach your goals.

Rate Table Disclaimer

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

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