











Finding a financial advisor is no easy task, so SmartAsset made it easier for Arizonans by pouring hours of research into hundreds of firms to determine Phoenix's top financial advisor firms. Here are the Top 10, as determined by SmartAsset. (See second page for methodology).

Rank	Financial Advisor	Assets Managed	Minimum Assets	Financial Services
1	Versant Capital Management, Inc. 	\$623,621,600	\$2,000,000	- Financial planning services - Portfolio management - Selection of other advisors (including private fund managers) - Consulting
2	Windsor Capital Management, LLC 	\$506,241,400	\$200,000	- Financial planning services - Portfolio management - Pension consulting services - Advisory consulting services
3	KeatsConnelly 	\$305,167,600	\$300,000	- Financial planning services - Portfolio management - Educational seminars/workshops
4	Hatton Consulting, Inc. 	\$290,213,800	No set minimum	- Financial planning services - Portfolio management - Pension consulting services - Selection of other advisors (including private fund managers)
5	Pathlight Investors, LLC 	\$263,648,800	No set minimum	- Financial planning services - Portfolio management - Automated advisory services
6	RTS Private Wealth Management 	\$239,811,400	\$1,000,000	- Financial planning services - Portfolio management - Selection of other advisors (including private fund managers)
7	Ironwood Wealth Management, LLC 	\$204,000,500	\$250,000	- Financial planning services - Portfolio management - Educational seminars/workshops
8	Your Source Financial 	\$187,635,900	No set minimum	- Financial planning services - Portfolio management
9	Heritage Wealth Management 	\$159,290,000	\$50,000	- Financial planning services - Selection of other advisors (including private fund managers)
10	Barnes Investment Advisory Inc. 	\$138,960,400	\$5,000	- Financial planning services - Portfolio management



## About

Windsor Capital Management, LLC is a fee-only firm that specializes in equity, fixed-income and balanced portfolio management. Windsor Capital Management's account minimums depend on the style of portfolio management. For fixed-income style accounts the minimum is \$200,000. For balanced style accounts it's \$400,000. The firm also offers web-based accounts, for which the account minimum is \$5,000.

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## Methodology

Finding a top financial advisor is no easy task, so SmartAsset made it easier for Arizonans with this list of the top 10 financial advisor firms in Phoenix. Through dozens hours of research into hundreds of firms, SmartAsset determined Phoenix's top financial advisor firms. The findings are laid out in the table and individual reviews of each firm were completed to show what sets those firms apart.

To determine the top financial advisor firms in Phoenix, SmartAsset looked at all U.S. Securities and Exchange Commission (SEC)-registered firms in the metro area, as these firms have a fiduciary duty to act in their clients' best interests. From those firms, we eliminated any that had disciplinary issues, to ensure that all of the firms that made the list had clean records. We also cut any firms that do not have financial planners or that do not manage individual accounts. The remaining firms were then sorted from most assets under management to least.

Information is presented by a third-party (SmartAsset.com). AZ Business Magazine ([www.azbigmedia.com/publication/azbusiness](http://www.azbigmedia.com/publication/azbusiness)) reprinted the SmartAsset list in their March/April 2018 edition. Information is believed to be factual and up-to-date, but Windsor Capital Management, LLC does not guarantee its accuracy and it should not be regarded as a complete analysis of the subjects discussed. All expressions of opinion reflect the judgment of the authors as of the date of publication and are subject to change.