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What do financial consulting firms do

In a state like Virginia that offers plenty of financial adviser opportunities, it can be hard finding the right company for you. To make your search easier, SmartAsset has upped the data and identified the best financial advisor companies in old dominion state. Below you will find the minimum account size for each business, the type of services they offer, the which cities from which they operate, and more useful information. SmartAsset's financial advisor compliance tool can save you even more time, as it pairs you with consultants in your field who specialize in your needs. As we found the best financial advisor companies in VirginiaFor this list, we considered only U.S. securities and exchange companies (SEC) registered with financial advisers who have their head offices in Virginia. The SEC requires advisers to abide by a fiduciary duty to act in the best financial interests of clients. We have removed from this list all companies that have disciplinary problems in the SEC dossier. We have also eliminated companies that do not offer financial planning or whose clients are not at least half of individuals. Finally, we took over the top 10 companies based on assets under management. We list them below, starting with the largest. All information is correct from writing this article. Mason Investment Advisory Services Assets Under Management \$8,330,740,673Number of Advisors30Time in BusinessFounded in 1982Fee StructureFee-based Mason Investment Advisory Services ranks first on our list of top Virginia financial advisor companies. The Reston-based team of financial advisor companies has a number of credentials. There are, among other financial certificates, accredited investment fiduciaries and certified public accountants (CPAs), accredited investment fiduciaries and certified public accountants. The company's clients include individuals, high net worth individuals, corporate pensions and profit-sharing plans, charities, foundations and foundations. As an ADV, it does not specify the minimum of a specific account. The individual client base of the company's investors is almost evenly divided between individuals and individuals with high net worth. Mason Investment Advisory Services is affiliated with broker-trader Mason Securities, Inc., which is owned by the same parent company. Certain employees of the company are also registered representatives of the broker-trader. This poses a potential conflict of interest as they earn transaction-based fees. However, the company is legally bound by its fiduciary duty to work in the best interests of clients. Mason Investment Advisory Services BackgroundMason Investment Advisory Services has been operating since 1982. It is a subsidiary of Mason International, Inc. The company's parent company also owns Mason Securities, Inc., a registered broker-trader. For private Mason offers comprehensive investment management, financial planning, planning, planning and preparation of taxes. On the institutional side, the company provides traditional consulting services, outsourced by the Chief Investment Officer (or discretionary investment advisory service), data aggregation and reporting services and pension plan. Mason Investment Advisory Services Investing StrategyMason Investment Advisory Services bases its investment approach in strategic asset allocation, which is in conjunction with rebalancing and diligent management selection. The company says it believes there are no reliable methods for predicting market trends and therefore does not participate in market time. He usually invests in the long run. The first step in the investment advisory process is to review the client's financial goals and current investments, which can also lead to the development of a comprehensive financial plan. Ode there, the company selects one of its five asset allocation models, which correspond to different levels of risk tolerance and different timely horizons. Asset allocation will typically involve as many as 16 asset classes, and investments are usually a mixture of active and passive investments. Signature Family Wealth Advisors Assets Under Management \$6,594,088,907Number of Advisors12Time in BusinessFounded in 1994Fee StructureFee-only The second company on our list is Signature Family Wealth Advisors, based in Norfolk and also has offices in the cities of Virginia Richmond and Charlottesville. It is registered to serve investors in a total of 13 states across the country. The team includes five certified financial analysts (CFAs), three certified financial planners (CFPs) and two certified public accountants (CPAs). The company only serves two main types of clients for a fee. Family Office clients tend to be families with a net worth of at least \$20 million who have complex financial problems. His other category of clients are clients of family wealth, who are usually families with a net worth ranging from \$5 million to \$20 million. In general, the company requires a minimum investment of \$5 million. While its focus is primarily on individuals, families and family entities, the company also serves charities. It can also provide advice to individual investors in plans for an independent pension. Signature fees are usually based on a percentage of assets under management. In some cases, however, the company may charge a flat fee. Certain investors may be able to invest in limited partnerships sponsored by the company, in which case they can pay a performance-based fee with quarterly management fees. Signature Family Wealth Advisors BackgroundSignature Family Wealth Advisors has been in business since 1994. It is who whooded by Brown Advisory Inc., an independent investment management firm. The company provides the following services to its clients: Investment Management Strategic and managing the cash management family Tax Organization Risk Management Estate and Wealth Transfer Planning Household Management Philanthropic Planning Signature Family Wealth Investment AdvisorsSignature

