



# 2017 Ranking & Reviews

Top Ranking Financial Advisors in Dallas, Texas

## Finding a Top Rated Financial Advisor in Dallas, Texas

There is a wide range of registered investment advisors (RIAs), wealth managers, and financial planners in Dallas, Texas.

Deciding to hire a financial advisor comes with a lot of questions. Where do I find a great wealth management firm in Dallas? How can I trust my Dallas financial advisor to put my interests first?

These questions are just the tip of the iceberg. There are many factors to consider when searching for a top rated wealth management firm or financial advisor in Dallas, Texas.

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## Answering Your Questions

To answer the many questions that Dallas residents may have regarding the best financial advisors in Dallas, the AdvisoryHQ research team has conducted a detailed analysis of wealth managers, financial and investment advisors in Dallas. We have published our findings in the sections below, starting with a list of the top 9 advisors, financial planners, and registered investment advisors in Dallas.



## AdvisoryHQ's List of the Top 9 Best Financial Advisors in Dallas

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Young Professionals Program



BRENNAN  
FINANCIAL SERVICES

Comprehensive Investment Strategies



CHESSMAN  
WEALTH STRATEGIES

Faith-Based Financial Planning



Dream. Plan. Achieve.®

Free One-Hour Consultation



HERITAGE  
FINANCIAL PLANNING

Financial & Lifestyle Resources Page



WEALTH MANAGEMENT

Total Digital Access



LEE FINANCIAL

Whole Vision Approach



WEALTH ADVISORS  
AN INDEPENDENT WEALTH MANAGEMENT FIRM

Executive Wealth Management



TOLLESON  
WEALTH MANAGEMENT

Private Banking

List is sorted alphabetically with highlighted features noted.  
Click any of the logos above to go directly to the detailed review section for that advisor.

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### 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.



## Chessman Wealth Strategies

Chessman Wealth Strategies was founded in 2004 as an independent financial advisor in Dallas, Texas, but they offer services to clients throughout the United States. Chessman Wealth offers financial planning and wealth management services geared to a unique set of clients.

This Dallas wealth management firm is operates on Christian principles and is committed to providing financial advice that is line with those religious principles. They do not clearly indicate whether they are fee-only or fee-based, however, we have included them on this list for the following features.

### Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Dallas Filling a Specific Need

In order to provide the best and most comprehensive services, Chessman Wealth caters to a specific group of clients. These include professionals, attorneys, and people in transition (change of employment, business succession, women in transition, retirees and people close to retirement).

### Wealth Management Services

Comprehensive wealth management starts with a thorough understanding of your financial goals. Your Dallas financial advisor will begin by getting to know you and your lifestyle in order to create a completely customized portfolio. Then, the two of you can build with the following services:



- Financial Planning
- Risk Management
- Wealth Management
- Tax Planning
- Business Planning
- Estate Planning
- Retirement Planning

### Faith-Driven Advisors

If your daily life is anchored by your faith and following biblical principles, Chessman Wealth may be perfect for you.



As Christian Financial Advisors in Dallas affiliated with Kingdom Advisors, an organization of Christian financial advisors, they believe in the eternal significance of the decisions you make concerning the stewardship of the resources God has bestowed upon you.

### No-Obligation Consultation

If you would like to test the waters before making the plunge, you can contact Chessman Wealth for a free, no-obligation consultation. They'll show you what they can do for you without any pressure to sign up for anything or pay any associated costs. This is a benefit to anyone looking for the right Dallas-based financial advisor.



# SMART CHOICES™

## ADVANCED PLANNING SOLUTION

### INVESTMENT CONSULTING & ADVANCED PLANNING



WEALTH PROTECTION



WEALTH ENHANCEMENT



WEALTH TRANSFER

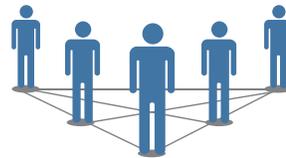


CHARITABLE GIVING

### RELATIONSHIP MANAGEMENT



CLIENT RELATIONSHIPS



PROFESSIONAL MANAGEMENT

## Trademarked Solutions

In the process of helping you manage your finances, Chessman Wealth has developed a trademarked 6-step system of Discovery, Smart Choices Strategy, Mutual Commitment, 45 Day Review, Advanced Planning, and Progress Managing. This comprehensive system allows complete coverage of all of your needs.

You can take a comprehensive look at what each stage of Chessman Wealth's 6-step system entails on their [Smart-Choices page](#).

Wade H. Chessman, CFP is President of Chessman Wealth Strategies, a Registered Investment Advisor. Chessman Wealth Strategies specializes in helping widows and other people going through life's transitions make informed financial decisions to help them restore order and confidence to their lives.

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