

# Top 10 Best Financial Advisors in Indianapolis, Indiana

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## 2016 RANKING OF TOP WEALTH ADVISORS

### **Finding the Top Financial Advisor in Indianapolis, Indiana**

Searching for the best of something can be a tough undertaking. Searching for the best financial advisors and wealth managers in Indianapolis, Indiana, is no exception. If you find yourself here, you most likely need clarity in your finances and you know that the services of a financial advisor will help you to assess your situation and plan for a bright future.

Financial advisors in Indianapolis offer a wide range of services from basic financial management to retirement to more complex issues like estate planning and investment management, which involves mutual funds, stocks, and building a successful portfolio.

Do you know yet what exactly it is that you want? Are you thinking ahead to the future? Where is it leading you? As you search for the right Indianapolis-based financial advisor for you, you probably want to know that your future is safe and secure in their hands. We couldn't agree with you more.

Building trust through a relationship with your financial advisor is paramount. After all, you are entrusting someone with all of your life's hard work and, what's more, you are paying them to do so! With such high stakes, it's essential to do the appropriate research to weed out those financial advisors in Indianapolis, Indiana, who are more profit-driven than client-driven.

At AdvisoryHQ, we have done our best to make your journey as straightforward as possible. As you will see through this report, we diligently scrutinize each and every financial advisor in Indianapolis. We apply our own methodology to narrow down a long list of firms to select

the top-performing financial advisors in Indianapolis for your consideration.



## **AdvisoryHQ's List of the Best Financial Advisors in Indianapolis**

- **Avalon Wealth Advisory**
- **Axia Advisory Corporation**
- **Bedel Financial Consulting, Inc.**
- **Castle Wealth Advisors, LLC**
- **Deerfield Financial Advisors, Inc.**
- **Halter Ferguson Financial, Inc.**
- **Market Street Wealth Management Advisors, LLC**
- **Ronald Blue & Company**
- **Wallington Asset Management, LLC**
- **Worley Erhart-Graves Financial Advisors**

*This list is sorted alphabetically (click any of the names above to go directly to the detailed review section for that advisor)*

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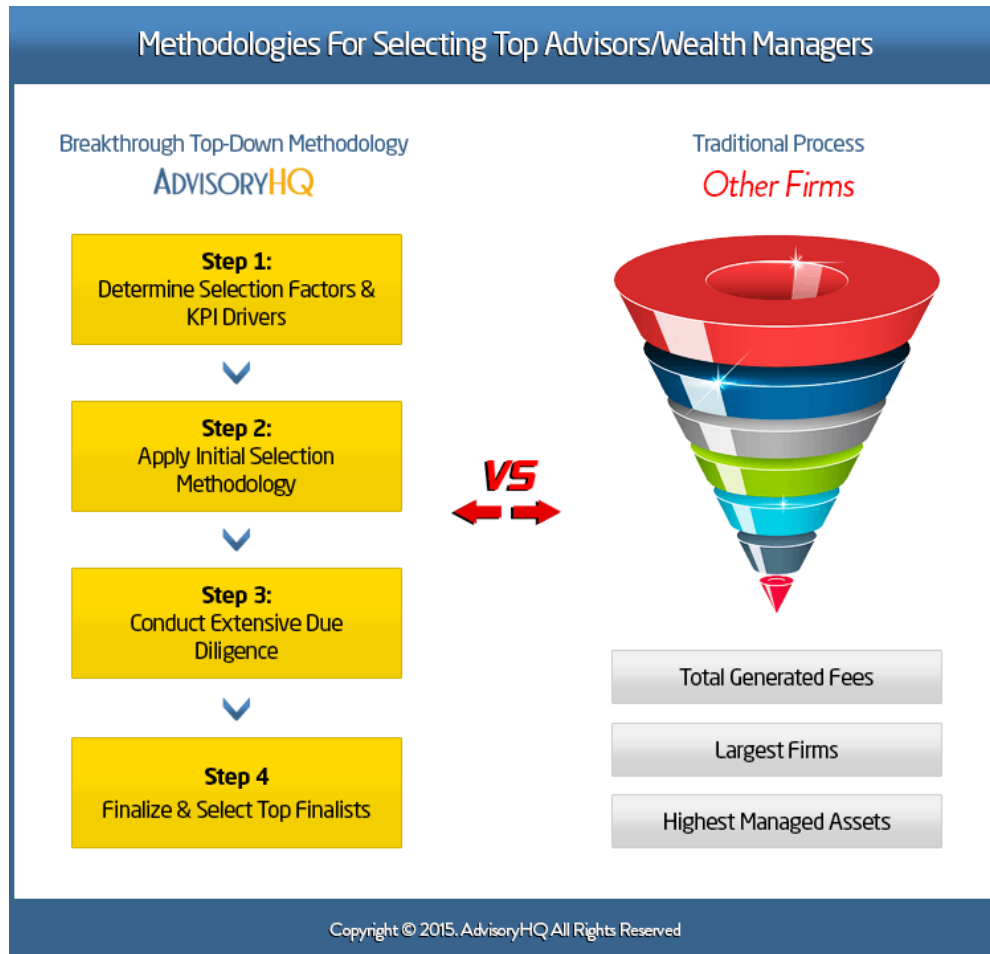
<b>Firm</b>	<b>Location</b>
Avalon Wealth Advisory	Indianapolis
Axia Advisory Corporation	Indianapolis
Bedel Financial Consulting, Inc.	Indianapolis
Castle Wealth Advisors, LLC	Indianapolis
Deerfield Financial Advisors, Inc.	Indianapolis
Halter Ferguson Financial, Inc.	Indianapolis
Market Street Wealth Management Advisors, LLC	Indianapolis
Ronald Blue & Co.	Indianapolis
Wallington Asset Management, LLC	Indianapolis
Worley Erhart-Graves Financial Advisors	Indianapolis

### **Methodology | Financial Advisors – Indianapolis**

What methodology did we use in selecting this list of the best financial advisors and top wealth managers in Indiana?

Using publicly available sources, AdvisoryHQ identified a wide range of financial advisors, asset and wealth managers, and financial planners that provide services in Indianapolis.

We then applied AdvisoryHQ's Breakthrough Selection Methodology to identify the final list of top advisors that provide services in and around Indianapolis.



## Detailed Review – Top Ranking Financial Advisors in Indianapolis

Below you will find comprehensive information on each financial advisor in Indianapolis that ranked in the top 10 on our list of top advisors and financial planners in Indianapolis.

# Bedel Financial Consulting, Inc. Review

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Established in 1989 by Elaine Bedel, [Bedel Financial Consulting, Inc.](#) is one of the leading female-owned Registered Investment Advisors (RIAs) in the country. They offer financial planning and investment management services to both individuals and institutional clients.

With over \$1 billion in actively managed assets and 18 employees supporting their clients, Bedel Financial is ready to help you meet your financial goals.

## **Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company**

The following is a listing of key factors that allowed Bedel Financial Consulting, Inc. to rank as one of 2016's top 10 financial advisory firms in Indianapolis, Indiana.

### No-Obligation Consultation:

With a no-obligation consultation available for prospective clients, this is a fantastic opportunity to discuss your goals and hear what the team at Bedel Financial can do for you. A consultation includes an assessment of your current financial situation and where you want to go from there. They also include a discussion of plans and strategies, financial projections, and a list of action items that reflect your tentative plan.

### The Bedel Barometer:

Bedel Financial has curated a neat little tool that is updated regularly and takes into account key areas that have historically been indicators of the strength of the U.S. economy. Since its beginning, the barometer has consistently maintained a positive score, which indicates that the economy is steadily moving towards growth.



### Your Independent Advisor:

From day one, Bedel Financial has believed that standing as an independent, fee-only fiduciary was the only way to do business. After all, how can you get good advice when communication is stifled by third-party commissions and things that are far from your best interest? You can rest easy knowing that doing what's best for you is Bedel Financial's only interest.

### Personal Services:

As an individual, you will be partnered with the Bedel Financial Consulting team, and they'll help you understand and plan for your future. Here's a look at services offered to individual clients:


- Comprehensive Wealth Management: This approach combines financial planning and investment management services into one comprehensive plan, and Bedel Financial believes this is the best way to manage and grow your assets.

- Retirement Focus Plan: Bedel Financial offers a toolbox of services that focuses on analyzing your ability to retire and implementing processes that ensure your success. They abide by a “RetireSecureStrategy” and also offer an additional layer of protection through insurance services.

Young Wealth Accumulators: It’s never too early to focus on being smart with your money. In fact, 20-40 year olds can benefit tremendously from establishing a solid financial foundation that will carry over into each phase of their lives. This service is dubbed “Generation NeXt” and is designed to guide a younger generation onto an affluent path.

#### Institutional Services:

As a fiduciary partner with their clients, Bedel Financial offers institutional services including the following:

- Retirement Plan Consulting: A trustee of a company retirement plan faces a lot of responsibility. Bedel Financial’s comprehensive process alleviates much of that responsibility and allows you to focus on making the best financial decisions possible.
  - Financial Education: Employees that are educated about and understand their company retirement plans are more apt to make smart financial decisions that brighten the overall picture. For this reason, Bedel Financial offers short- and long-term education with an unmatched level of professionalism.
  - Investing: Ultimately, the investments you make are what grow your assets and allow you the financial freedom to pursue your goals. Bedel Financial offers short- and long-term investment planning that utilizes no-load mutual funds, EFTs, separately managed accounts, and more.
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## **Conclusion – Top 10 Financial Advisory Firms in Indianapolis, Indiana**

Now that you have reviewed the top financial advisors in Indianapolis, Indiana, we hope that you feel hopeful and excited about what you will do next. Whether you have an idea of which provider will work best for you or are still on the fence, you have enough information to get on the road to a successful partnership with a financial advisor.

As you make your considerations, think about what you want to gain out of a relationship with your financial advisor. Are you looking for general direction? Have you gone through a major life change and feel like you don't know which direction you should go for? Do you need to plan for your retirement? Making a list of what you want will allow you to match those wants and needs up with the services of one of the top 10 financial advisors in Indianapolis.

Once you've chose one or two prospects, check to see if they offer a free consultation, whether by phone or in person. This is a great way to start a working relationship and get answers to questions related to your specific circumstances. Although the journey to financial freedom can seem at times intimidating, once you find the right Indianapolis financial advisor, you will feel much more at ease.

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Cheers,  
AdvisoryHQ Team