

How We Select DC's Best Financial Advisers

February 13, 2025

The Process

This list of financial advisers includes three different categories: the area's top financial advisers, marked with a "Top Financial Advisor" badge, "top producers" at local banks and brokerages, and sponsors. The process to determine each set of names differed.

To arrive at the names of the area's 375 top financial advisers—the fee-only financial planners, fee-based advisers, estate attorneys, tax accountants, and insurance advisers marked with a "Top Financial Advisor" tag—we distributed surveys to hundreds of people who work in the local financial industry. We asked them whom they would trust with their own money. We also did our own research, consulting industry experts and publications. The "Top Financial Advisor" names on this list are the people who received the strongest recommendations.

Most of the 375 "Top Financial Advisors" are at smaller, independent firms. The surveying process does not turn up as many names at large banks and brokerages. One reason is that banks and brokerages sometimes keep more work in-house—and if a financial adviser isn't referring clients to outside professionals, that adviser might not have a network that earns peer votes.

Some clients prefer working with smaller wealth-management firms, while others may want their money handled by a big institution such as a Wells Fargo or Morgan Stanley. So, to offer names of the area's top bank wealth advisers, we asked banks and brokerages to tell us the individuals with the most assets under management, or AUM. The bank wealth advisers on this list—marked by a "top producer" badge—were provided by each institution. While having the most assets under management doesn't necessarily mean an adviser is right for you, it probably does mean the person is doing something right

Our digital listings of financial advisers also includes sponsors, but only top advisers or producers carry the award logo.

My Financial Adviser Is Not on This List. Should I Choose Another One?

Exclusion from this list does not mean the person is a bad financial adviser. People can be left off for a variety of reasons—they may have small practices and not interact much with other advisers, limiting their peer votes. If you have a financial adviser that you like and trust, there's no reason to sever that relationship.

Isn't Peer Voting Just a Popularity Contest?

That's no doubt part of it. But we try to correct for that by examining voting patterns and throwing out suspicious votes.

More Frequently Asked Questions

How often do we publish this list?

The list is published every 18 to 24 months. The new list is from January 15, 2024.

How can I get included in the Top Financial Advisers list?

The “Top Financial Advisor” list is compiled via a survey—the top vote-getters make the list. If you are a wealth adviser at a bank or brokerage, the names were provided by your institution.

How can I get the next Top Financial Advisers survey?

Everyone voted a “Top Financial Advisor” gets the next survey automatically. In addition, we distribute surveys through local financial membership organizations, such as the national capital area chapter of the Financial Planning Association. We do not send targeted surveys to anyone who asks for one, because that would skew the results.

Have a Question? Need to Update Your Current Listing?

To update your listing, please fill out [this form](#). For all other questions, please contact Sherri Dalphonse at sdalphonse@washingtsonian.com.

Edited by

Sherri Dalphonse

EDITOR IN CHIEF

Sherri Dalphonse joined *Washingtonian* in 1986 as an editorial intern, and worked her way to the top of the masthead when she was named editor-in-chief in 2022. She oversees the magazine's editorial staff, and guides the magazine's stories and direction. She lives in DC.



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