

## Top Money Advisers | By Mary Clare Glover

Looking for good advice? Here is one of the area's best financial planners.

To put together this list of Washington's top financial experts, we surveyed hundreds of area financial professionals, asking them: Whom would you trust with your own money? We also did our own research, interviewing experts and consulting industry organizations and publications. The people listed received the most recommendations from all sources. No list can be totally comprehensive, and omission from this one doesn't mean an adviser isn't good. Likewise, inclusion here doesn't necessarily mean the person is right for your needs.

### Fee-Only Advisers

This category includes certified financial planners (CFPs)—who create detailed financial plans and often also manage money—as well as financial advisers who invest and manage portfolios. Fee-only advisers don't accept commissions or referral fees—a practice, they say, that keeps them free of bias. Most charge a flat fee, an hourly rate, or a fee based on a percentage of assets. "Minimum" is the minimum investment portfolio handled by an adviser—though many take smaller portfolios from, say, young professionals who have the promise of higher future earnings.

**Christopher N. Brown, CFP**, Ivy League Financial Advisors, Rockville; 301-258-1300; ivyfa.com.  
Minimum: \$500,000. Specializes in working with retirees.

## CHRISTOPHER N. BROWN, MBA, CFP®, AIF® Ivy League Financial Advisors LLC



So tell me, what is it you plan to do with your one wild and precious life?

That's an important question we often ask our new clients. It gets to the heart of our mission at Ivy League Financial Advisors LLC—helping our clients achieve their life goals through the proper management of their financial resources. Good financial planning is about much more than managing your investments. It's about pulling all the pieces together—**retirement planning, estate planning, insurance needs, college funding, and charitable giving**—along with **investment management**, to provide a personalized roadmap for achieving your objectives.

Our business model is based on the fiduciary standards of loyalty, due

care, full disclosure and utmost good faith to our clients. We can fulfill these standards because we are Fee-Only financial advisors. Since our firm's inception over 13 years ago, our clients have been our sole source of compensation—we've never accepted one dollar from sales commissions or referral fees. This approach allows us to provide objective advice to all aspects of our clients' financial lives without the conflicts of interest inherent in the products and services provided by traditional, commission-based brokerage firms.

We recognize that each client is unique and deserves to have a solution customized to his or her individual needs. We invite you to call us to schedule a complimentary initial consultation to see if we are the right fit for you. We are conveniently located in Rockville Town Center, with easy access to I-270, Rockville Pike, and the Metro.

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