

Call: 800-899-3880

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Allegheny Financial Group - Allegheny Investments



Financial Planning

Investment Management

AFG Ventures

Our Financial Advisors

Company Information

Blog

Contact Us



Hiring any financial advisor in Pittsburgh is not difficult—but finding the top financial planner in Pittsburgh is.

INVEST IN YOUR PEACE OF MINDSM

Talk to Allegheny Financial Group

If what you know and love doesn't happen to be financial planning, talk to Allegheny Financial Group. With regular face-to-face meetings and our unbiased insight, we will create a clear plan together. A plan uniquely tailored to you. Your personal financial advisor and support

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team will work with you and your family over the long term to fully understand, coordinate and optimize every facet of your finances. Give us a call, and let's get started. So you can begin devoting your attention to more important things than money.



Who We Are

Allegheny Financial Group is an independent financial planning and **investment management** firm headquartered in Pittsburgh, Pennsylvania. Allegheny prides itself on providing comprehensive financial planning through individualized service that is tailored to each client's particular need and goals.



How We Can Help You Reach Your Financial Goals

Because financial planning is a comprehensive process, and not a particular product or investment, we provide services that tie together all the elements of your financial situation in order to meet your financial goals, including: investment and **risk management**, as well as retirement, estate, tax and **education planning**.



Who We Serve



As a financial advisory firm, Allegheny Financial Group provides financial planning and investment management guidance to households, businesses and non-profits that want the highest level of attention and fully independent advice.

Why Choose Allegheny Financial Group?



What makes us different is our:

- ▶ Quality of service
- ▶ Individual attention
- ▶ Objectivity
- ▶ Complete planning
- ▶ Ability to put our clients first
- ▶ CFP® Professionals

As a firm that pioneered financial planning in Pittsburgh, Allegheny has earned clients' trust with a high degree of personal attention in combination with specialized knowledge, an integrated team-based approach and first-class market research.

Our advisors have the disciplined process to provide tailored financial programs that address your individual goals and aspirations.

At Allegheny Financial Group, our philosophy is to apply a holistic approach to financial planning for our clients, analyzing all aspects of their financial lives. Financial planning entails much more than just investing; it encompasses budgeting, planning for retirement, saving for education, managing your taxes, acquiring insurance coverage and formulating an estate plan. As a result, all of our board members and many of our advisors obtain CERTIFIED FINANCIAL PLANNER™ certification. CFP® professionals have completed an extensive course of

study, testing and experience requirements, and are held to rigorous ethical standards to ensure they are highly qualified to develop a plan for your finances, while putting your goals and needs first. This certification is recognized as the highest standard in personal financial planning. In fact, according to the CFP Board, less than 20% of practicing financial advisors in the industry can claim this distinction.*

For more information on the CFP[®] certification, visit: [letsmakeaplan.org](https://www.letsmakeaplan.org).

*Source: www.cfp.net/about-cfp-board/why-cfp-certification-matters.



Financial Planning

The process of setting financial goals and developing strategies to accomplish them is fundamental to your financial well-being. Learn more about Allegheny's financial planning process.



Investment Management

Managing your financial assets is critical to your family's or your business's well-being. Whether it's growing your assets, creating income or minimizing taxes, our team of professionals will work with you to manage your assets for long-term success.



Our Financial Advisors

Allegheny financial advisors have a disciplined process to provide you with tailored financial programs that address your individual goals.

In the Community

Allegheny Financial Group is proud to support neighboring organizations who are making a significant impact in our community.

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