

# Sponsored Content: What Makes Salomon & Ludwin Richmond's "Best Private Wealth Advisor"?

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Salomon & Ludwin is honored to be named "Best Private Wealth Advisor" by the readers of *Richmond Magazine* for the sixth time! ([See important disclosures and methodology.](#)) This recognition adds to more than a decade of national accolades from respected institutions, including *Barron's*, *The Wall Street Journal*, *Financial Times*, *Virginia Business Magazine*, and *Forbes*. ([See important disclosures and methodology.](#))

While we are very grateful for these honors, they are not what drive us. Instead, they are a reflection of the values that guide everything we do, and the belief that true wealth management goes beyond performance. It's about deeply personal relationships, thoughtful planning, disciplined strategy, and unwavering loyalty to the families we serve.

Many financial advisors make similar claims. At Salomon & Ludwin, we go beyond just words. We prove our commitment by investing in our experienced, devoted team and one-of-a-kind systems that enhance transparency and planning, both of which are only available at Salomon & Ludwin. From the beginning, we've understood that our success comes from putting clients' needs first and taking care of them like family.

## Who are S&L's Clients?

Salomon & Ludwin works exclusively with individuals and families who expect more than traditional wealth management. Many are first-generation wealth builders, entrepreneurs, or stewards of multigenerational capital. They share a desire for clarity, confidence, and a deeper, more personal relationship with their money and with us.

S&L is intentionally not a high-volume practice. We are built for intimacy, customization, and high-touch service. Our clients are those who:

- Want to simplify complexity across their financial lives
- Embrace a disciplined approach to markets and money
- Value accountability and proactive communication
- Expect proactive, thoughtful guidance that evolves with them
- Desire legacy planning that reflects their values, not just their assets



## **Innovation with Purpose: Tools & Services Built to Deliver What Matters:**

Everything we do is guided by the needs of our clients. That commitment drives innovation in our tools and services, which led us to create and build:

- TriggerPoint™, our patented investment strategy
- Proprietary systems & analytics to quickly and insightfully track every element of clients' financial lives

- A compassionate, credentialed team with a focus on personalized experience

Each is unique to Salomon & Ludwin and has helped us guide generations of Richmond families.

## **TriggerPoint™: Transforming Uncertainty into a Disciplined Advantage**

Investing is not about predicting the future; it's about preparing for it. Salomon & Ludwin designed our patented TriggerPoint™ investment strategy to help provide peace of mind by taking advantage of market volatility with a methodical, unemotional, and deliberate plan.

The objectives are based on common sense and logic, not chance, and are designed to help clients answer questions like:

- When should I take profits?
- How can I avoid panic during downturns?
- What's the right time to reinvest?
- How do I maintain income without emotional selling?

TriggerPoint™ replaces guesswork with a repeatable, rules-based plan. It's a system that has been stress-tested across more than a century of market history. At its core, it is rooted in the timeless principle of "buy lower, sell higher", executed with precision, not emotion.

TriggerPoint™ is a complex system that monitors 23 markets across asset classes, geographies, and sectors. It features two distinct approaches:

- **Opportunity Cash Strategy** is designed for investors in the accumulation phase. This strategy systematically locks in gains during market strength and reinvests during downturns, turning market volatility into opportunity.

- **LifeStyle Cash Strategy** is tailored for those who require a predictable cash flow. This approach methodically sells during market strength to build a reserve, ensuring future financial security without the need to react to market downturns.

TriggerPoint™ is designed to remove uncertainty and replace it with confidence. [Learn more about TriggerPoint™.](#)

## Meaningful Advice Comes from Deep Insight

At Salomon & Ludwin, every client relationship begins with a deeply personal connection. These connections give us the insight needed to design, manage, and adapt highly customized financial and investment plans. While collecting data and goals is standard, what sets S&L apart is what we do with this information and how it impacts our clients.

We built the S&L Data Warehouse & Reporting System, proprietary tools that integrate every relevant detail about a client's household, personal, and financial life into one system. This allows us to connect the dots between financial plans and the real world.

It's not just about knowing what you own; it's about answering important questions, like:

- How many months of spending are protected from market volatility?
- How much cash has been generated for future needs?
- Is there an opportunity to harvest tax losses or rebalance strategically?
- Have I gifted thoughtfully? Do I need to adjust for this year?



Salomon & Ludwin uses data to provide unique, personalized, proactive advice to help reduce stress and improve financial outcomes. [Learn more about S&L's approach.](#)

## The Salomon & Ludwin Team: Compassion Meets Expertise

S&L is a boutique, family-owned firm deeply rooted in Richmond, VA. Partners Dalal Salomon, Dan Ludwin, and Jacob Salomon center the firm around two central beliefs that run through all aspects of the business:

1) Every client deserves a uniquely personal experience; 2) Clients always come first.

To make sure these ideals are upheld, S&L built a team that combines sincerity and compassion with experience and expertise. Our Financial Advisors average 25+ years in the industry and have earned designations in financial planning (CFP®), high-net-worth client management (CPWA®), business owner exit planning (CEPA®), and a J.D. with expertise in estate planning. Our Client Relationship team has each been servicing clients for over 15 years. Our Investment and Operations teammates are each 30+ year industry veterans, with extensive skills and knowledge, including a CFA® designation. We've built this team to ensure clients receive sophisticated, high-level guidance that is also deeply personal.

You work hard and make sacrifices to create, build, and share your wealth. Every team member at Salomon & Ludwin will treat you with the respect that journey deserves.

## Personally Invested

At Salomon & Ludwin, *Personally Invested* isn't just a tagline. It's our commitment. We're proud to call Richmond home, honored to serve the families who place their trust in us, and deeply committed to earning that trust, year after year.

To our clients: Thank You.

To those seeking something more from wealth management: we'd be honored to talk.

Learn more about Salomon & Ludwin at [www.salomonludwin.com](http://www.salomonludwin.com).

**Disclosures:** Salomon and Ludwin was voted Best Private Wealth Advisor for 2025 by the readers of Richmond Magazine through an online reader survey that was promoted in their print magazine, on their website, and through e-newsletters and social media channels. Results may not be representative of any one client's experience with Salomon & Ludwin, nor are they indicative of future performance. Neither Salomon & Ludwin, nor any of the firm's employees, paid a fee to Richmond Magazine in exchange for the recognition.

Methodology and further details around recognition from Barron's, The Wall Street Journal, Financial Times, Virginia Business Magazine, and Forbes may be found at <https://salomonludwin.com/category/recognition/>. Specific awards referenced are: Barron's 2025 Top 1,200 Financial Advisors; Forbes 2025 America's Top Women Wealth Advisors; Virginia Business Magazine's 2024 Virginia Women in Leadership; and Forbes 2024 Top RIA Firms. Additionally, Dalal Salomon was featured



in an interview with Wall Street Journal on March 7, 2025. Results may not be representative of any one client's experience with Salomon & Ludwin, nor are they indicative of future performance. Neither Salomon & Ludwin, nor any of the firm's employees, paid a fee to any of the firms from which they have received awards in exchange for the recognition.

Salomon & Ludwin is registered with the Securities and Exchange Commission as an investment advisor. Registration does not imply any level of skill or training.

For more information about our firm, our people, and our business, please contact us at 804-592-4999 and request our Form ADV Part 2A brochure. You may also find our brochure and more information about investing at [www.investor.gov](http://www.investor.gov) or <https://salomonludwin.com/advpart2a/>.

Our Form CRS: Firm Customer Relationship Summary may be found at <https://salomonludwin.com/wp-content/uploads/2025/04/Salomon-Ludwin-Form-CRS-April-04-2025.pdf>.

These materials are provided for informational purposes only and should not be used or construed as an offer to sell or a solicitation of an offer to buy any security, or an invitation to participate in any strategy. Your plan will be created based on the information and assumptions you provide and modeled based on a Monte Carlo simulation which is based on historical data. The simulation is a statistical exercise but is not absolutely predictive and there is no guarantee that your plan or our services will be successful.

The strategies and/or investments discussed herein may not be suitable for all investors. This information is from sources we believe to be reliable, but we do not warrant its accuracy. Holdings, performance, and strategy information are subject to change without notice. All investments and strategies carry the risk of loss. Past performance is not indicative of future results. Salomon & Ludwin and its personnel are not accountants and do not provide tax or legal advice.

**Professional Designations:** CERTIFIED FINANCIAL PLANNER (CFP®) Candidates must pass a CFP-board registered program or hold one of seven advanced degrees, designations or professional licenses and pass the CFP exam. Prerequisites include a bachelor's degree (or higher) from an accredited college or university and three years of full-time personal financial planning experience. Thirty hours of continuing education must be completed every two years. Areas of study include insurance and estate planning, employee benefit and tax planning, as well as investment and retirement planning. CFP practitioners are also subject to strict adherence to the CFP Board's Financial Planning Practice Standards and Professional Code of Ethics and Responsibility.

#### Chartered Financial Analyst (CFA®)

The CFA® designation is awarded by the CFA Institute. Candidates must be in the final year of a bachelor's degree program, or have four years of professional work experience, or have a combination of professional work and university experience that totals at least four years. The program consists of a self-study program taking 250 hours of study for each of the three levels, and each level is awarded after passing a six-hour course exam. Charter holders are subject to the CFA Professional Conduct Program.

#### CERTIFIED PRIVATE WEALTH ADVISOR® (CPWA®)

The CPWA designation signifies that an individual has met initial and on-going experience, ethical, educational, and examination requirements for the professional designation, which is centered on private wealth management topics and strategies for high-net-worth clients. Prerequisites for the CPWA® designation are: a Bachelor's degree from an accredited college or university, or one of the following designations or licenses: CIMA®, CIMC®, CFA®, CFP®, ChFC®, or CPA license; have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements and five years of experience in financial services or delivering services to high-net-worth clients. CPWA® designees have completed a rigorous educational process that includes executive education requirements and successful completion of a comprehensive examination. CPWA® designees are required to adhere to the Investments & Wealth Institute Code of Professional Responsibility and Rules and Guidelines for Use of the Marks. CPWA® designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through the Investments & Wealth Institute. CERTIFIED EXIT PLANNING ADVISOR (CEPA®) Financial Advisor Candidates advise business owners on how to sell or transition their business successfully through exit planning by using Value Acceleration Methodologies. CEPA's must pass a proctored exam and four days of rigorous courses.