

Top 10 Best Financial Advisors in Atlanta, GA | 2017 Ranking | Atlanta Area Wealth Managers

2017 RANKING & REVIEWS TOP RANKING FINANCIAL ADVISORS IN ATLANTA

Finding the Top Financial Advisors in Atlanta, Georgia

Individuals and families in Atlanta are often looking for the best financial advisors. These Atlanta financial planners and wealth managers can advise them on effective planning and how to balance risk-tolerance with wealth building investments.

A financial planner in Georgia can help an individual, family, or business put together a plan that allows them to live comfortably in the present while working towards a sustainable life in retirement. There are several long term benefits to be gained from soliciting the expert advice of a wealth management firm in Atlanta.

With just a handful of online resources that cover financial advice and planning, finding a top asset manager or financial advisor in Atlanta and other cities in Georgia can sometimes be challenging.

If you are looking for one of the best Georgia financial advisors, the article below will help streamline and simplify your research, review, and selection process.

Locating and working with a great financial advisor in Atlanta may be especially difficult for individuals who aren't overly familiar with the city's financial planning landscape.

That's why we have put together this review for anyone looking to identify some of the best wealth management firms in Atlanta.

Whether you are looking for advice for personal finances, retirement planning, investments, or financial goal-setting, using the resources below, you are sure to come across an Atlanta financial advisor that's just right for you.



Award Emblem: Top 10 Best Financial Advisors in Atlanta, GA

AdvisoryHQ's List of the Top 10 Best Financial Advisors in Atlanta, GA

List is sorted alphabetically (click any of the names below to go directly to the detailed review section for that advisor)

- [Anthony Smith Advisors](#)
- [Berman Capital](#)
- [Brightworth](#)
- [Capital Investment Advisors \(CIA\)](#)
- [Creative Financial Group](#)
- [Homrich Berg Wealth Management](#)

- [Modera Wealth Management](#)
- [Oakbridge Partners](#)
- [TrueWealth](#)
- [White Horse Advisors](#)

Top 10 Best Financial Advisors in Atlanta, GA | Brief Comparison

Financial Advisors in Atlanta	Highlighted Features
Anthony Smith Advisors	Comprehensive Administrative Services
Berman Capital	Side-by-Side Investing
Brightworth	Global Approach
Capital Investment Advisors	SWAN Approach
Creative Financial Group	Simple Process
Homrich Berg Wealth Management	Education Planning
Modera Wealth Management	Wealth Management Coordination
Oakbridge Partners	Client-Centered & Relationship Based
TrueWealth	Exceptional Continuity of Service
White Horse Advisors	Business Owner Investor Model

Table: Top 10 Financial Advisors in Atlanta, Georgia | Above list is sorted alphabetically

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services and products that are ranked on its various top rated lists?

Please click here "[AdvisoryHQ's Ranking Methodologies](#)" for a detailed review of AdvisoryHQ's selection methodologies for ranking top rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Top Ranking Financial Advisors in Atlanta, Georgia

Below, please find the detailed review of each firm on our list of the best financial planners in Atlanta. We have highlighted some of the factors that allowed these Atlanta wealth management firms to score so high in our selection ranking.

See Also: [Best Financial Advisors in D.C., Maryland, and Virginia \(Tri-State\)](#)

Anthony Smith Advisors Review

[Anthony Smith Advisors](#) is a registered investment advisor in Atlanta that was founded over 19 years ago.

Led by Principal [Anthony C. Smith, MTX, JD, CFP®](#), Anthony Smith Advisors use a well-defined philosophy and leverages the skills of a highly experienced team of professionals. This wealth management firm in Atlanta uses a multi-disciplined team-based approach to providing service to its clients.

While the firm's clients come from all walks of life—entrepreneurs, executives, trusts and estates, individuals, families—a typical client is required to have a [minimum investable portfolio of \\$500,000](#).

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Atlanta

Below are key factors that enabled this advisor to rank as a top registered investment advisor in Atlanta, Georgia.

Independent, Fee-Only Advisory Firm

Anthony Smith Advisors is an Atlanta wealth management firm that provides services to its clients on a [fee-only](#) advisory basis. This means that clients receive advice from a team that has no affiliations with any investment brokers, bankers, or insurance firms. They are fully objective in the advice they offer.

Anthony Smith Advisors' independent status means they are truly free to offer unbiased, impartial advice that benefits only their clients and no other third-party.

Commitment to Relationships

As a top ranking financial advisor in Atlanta that works with individuals, families, businesses, corporate executives, entrepreneurs, family trusts and foundations, the firm is committed to building long-lasting relationships with its clients.

Serving over 150 families, a large proportion of the firm's clients have come via referrals from other clients, an indication of the quality of service and advice provided by this wealth management firm in Atlanta.

Qualified Team of Professionals

The Anthony Smith [team](#) comprises of a group of seasoned professionals with a diverse and broad-based set of skills and experience.

While all of its advisors hold the industry-venerated Certified Financial Planner™ (CFP) designation, the team also has members with advanced degrees including CPA, JD, MBA and Masters of Taxation.

Personalized Service

While many financial advisors in Atlanta may subscribe to a template-based approach to delivering efficient service, cookie-cutter models just don't fly at Anthony Smith Advisors. The Atlanta wealth management firm's investment

portfolios are highly personalized and individually crafted to meet each client's unique goals.

Services Offered

As an fee-only financial advisor in Atlanta, the team at Anthony Smith are experts at providing a range of personalized financial planning, money management, and asset allocation services that help their clients achieve their financial objectives.

These services [include](#):

- Investment and wealth management
- Financial and estate planning
- Retirement planning
- Income, gift and estate tax planning
- Wealth transfer strategies

Comprehensive Administrative Services

As you accumulate wealth, your financial assets are bound to get as complicated and varied as the life you're living. Anthony Smith Advisors is an Atlanta wealth management firm that recognizes this, and that will help you develop the administrative infrastructure and processes you need to comfortably manage your investments.

These services [include](#):

- Assistance developing a secure system for viewing account balances held at Charles Schwab & Co.
 - Comprehensive accounts for Charles Schwab & Co. accounts
 - Tracking system for income, portfolio performance, and taxable gains and losses for your Charles Schwab & Co accounts
 - Directing trades to an alternative account if you choose to stay with your current broker
 - Assistance negotiating institutional rates
 - Assistance establishing custodian relationships
 - Aggregation service to create reports for accounts held outside of Charles Schwab & Co.
-

Berman Capital Advisors Review

[Berman Capital Advisors](#) is an independent financial advisor in Atlanta that was established in 2010 by [Founder & CEO Justin Berman](#).

Before establishing Berman Capital Advisors, Mr. Berman worked in a number of senior management and leadership roles at some of the most prestigious institutions including Goldman Sacs & Co., myCFO, Inc., and Arthur Andersen & Co.

He leveraged this wealth of experience to form this Atlanta financial advisory firm.

The primary goal of Berman Capital Advisors is to assist high net-worth clients who are looking for objective advice from independent financial planners in Atlanta.

As one of the top wealth management firms in Atlanta, Berman Capital Advisors provides affluent individuals and families with the advice and guidance they need to preserve, grow, and enjoy their wealth for many generations.



Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Atlanta

Below are key factors that enabled this advisory firm to rank as a top wealth management firm in Atlanta.

Independent Advice

As an independent financial advisor in Atlanta, Berman Capital Advisors is not affiliated with any other investment dealer, broker or financial agent. They are a [fee-only](#) firm that does not accept any commissions.

Clients can rest easy knowing they are being advised as opposed to sold on a specific course of action.

Vast Range Of Product/Service Offerings

When it comes to choice, clients want their wealth management firm in Atlanta to offer lots of it and that's precisely what Berman Capital Advisors does. These Atlanta financial planners can help clients with a variety of wealth management needs.

Services offered by Berman Capital Advisors [include](#):

Wealth Management:

- Customized investment and asset allocation planning
- Construction of investment portfolios
- Continuous focus on performance and evaluation
- Customized reporting
- Research
- Rigorous proprietary processes

Family Office Services:

- Estate and trust planning
- Risk management
- Income and debt analysis and projections
- Tax planning

Commitment to Follow Their Own Advice

Few financial advisors in Atlanta can say they “put their money where their mouth is!” At Berman Capital Advisors, the founding partners are committed to the advice they offer by investing alongside their clients.

Clients gain an extra level of reassurance knowing their Atlanta financial planners are practicing what they preach by [investing side-by-side with clients](#).

Focused Approach

In today’s investment climate, where returns are hard to come by, many Atlanta financial advisors are tempted to go further down the risk curve to “make their numbers.” The Berman Capital Advisors team follows a [cautious philosophy](#) of wealth preservation and capital growth through minimal risk.

As a policy, this wealth management firm in Atlanta does not invest its own funds in highly leveraged or speculative ventures. This means that they do not risk client funds in such strategies either.

Complete Transparency

The firm does not have any hidden charges or complex fee structures. Clients have complete transparency over all of their fee arrangements with the firm.

Trusted and Reliable Custodians

As a renowned financial advisor in Atlanta, Berman Capital Advisors has forged relationships with highly regarded partners—such as Fortigent Consolidated Reporting, Northern Trust, Perishing Advisor Solutions/Bank of New York Mellon, and Charles Schwab—to offer custodial services and investment reporting to its clients.

Clients open accounts directly with their preferred custodian, ensuring that the team of Atlanta financial advisors at Berman Capital Advisors does not have direct control of client assets.

Wealth of Online Resources

Berman Capital Advisors’ clients benefit greatly from working with one of the top financial advisors in Atlanta. The firm’s strategic partnership with Massey, Quick & Co., as well as in-house expertise, means clients have access to a wealth of the latest research, articles and [news](#).

[Don't Miss: Top Financial Advisors and Wealth Managers in Nashville and Memphis, Tennessee](#)

Brightworth Review

[Brightworth](#) is a [fee-only](#) wealth manager in Atlanta that serves over [550 clients in nearly 30 states](#) across the USA. As a top-ranked Atlanta financial advisors, the Brightworth team offers a broad spectrum of expertise across an array of financial disciplines.

The roots of Brightworth go back to 1981, when 24-year-old Dave Polstra was working with a Big Eight accounting company as a CPA. Passionate about doing more than just auditing, the young man made his intent clear to his boss—he wanted to move into the financial planning world. The response: “You’ll never make it!”

After over three decades of serving in the financial advisory business, Dave Polstra, CPA, CFP®[®], CIMA®[®], and his partner and co-founder at Brightworth, Chris Dardman, CPA, CFP®[®], CIMA®[®], CAIA, have established themselves as premier financial advisors in Atlanta and across the country.

Today, the wealth management firm in Atlanta has over a billion dollars under its management, and has been recognized by industry opinion leaders as one of the top Registered Investment Advisors (RIAs) in the country.

Obviously the boss at the old accounting firm had it all wrong!

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Atlanta

Below are key factors that enabled this advisory firm to rank as a top wealth management firm in Atlanta.

[Award-winning Registered Investment Advisor \(RIA\)](#)

Financial Times included Brightworth in their 300 Top Registered Investment Advisors (RIA) list.

The firm and individual advisors on the Brightworth team have also been recognized among the nation's top wealth managers by Charles Schwab Institutional, Bloomberg Wealth Manager, Investment News, Barron's, Medical Economics, Financial Advisor, Robb Report/Worth, Reuters Advice Point and Mutual Funds.

These honors, by some of the financial industry's most venerated institutions, highlight why Brightworth is looked upon as a top-notch financial advisor in Atlanta.

Company Motto

The founding Principals of Brightworth established a [company motto](#) that deeply resonates with their clients even today: "taking care of our clients in the same manner we would want our own parents taken care of."

Adherence to these words is what sets Brightworth apart from the many wealth management firms in Atlanta.

Global Approach

Brightworth's team of financial advisors in Atlanta use a global approach when building individual client portfolios. This approach enables the strategic use of alternative investment vehicles to reduce portfolio volatility while also improving investment returns.

Wide Client Base

As broad-based financial planners in Atlanta, the firm supports a variety of clients, from corporate executives and retirees to business owners, entertainers, and athletes.



Forward Thinking

The co-founders and senior leadership in Brightworth have a forward-thinking approach to providing continuity of service to their clients.

This Atlanta wealth management firm has created a defined succession plan by which future leaders and advisors within the firm are being groomed and positioned to serve not only the current generation of clients, but also future generations to come.

Capital Investment Advisors (CIA) Review

[Capital Investment Advisors \(CIA\)](#) is a [fee-only](#) financial advisor with offices in Atlanta and Florida. This wealth management firm in Atlanta has been providing a broad range of financial advisory and portfolio management services to clients since 1994.

Account Asset Value	Fee (minimum fee of \$2,500)
First \$0-\$1,000,000	1.0%
\$1,000,000-\$3,000,000	0.9%
\$3,000,000-\$5,000,000	0.8%
Over \$5,000,000	0.7%

The [fees](#) charged by the firm make it extremely cost-effective for clients to work with a top rated Atlanta financial advisor.

Starting at 1%, for portfolios of up to \$1,000,000, and capping at 0.7% for portfolios of \$5,000,000 or more, these fees compare extremely well against the 3.2% to 4% charged by large mutual fund companies.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Atlanta

Below are key factors that enabled this advisory firm to rank as a top Atlanta financial advisory firm.

Fee-Only Registered Investment Advisor (RIA)

Capital Investment Advisors is a [fee-only](#) Registered Investment Advisor (RIA) in Atlanta that offers clients a broad range of financial services. As such, the advice offered by CIA specialists is always aligned with the interests of its clients, and no one else.

As a top-rated financial advisor in Atlanta, this firm offers:

- **Retirement Planning:** for individuals and small businesses
- **Investment Tax Planning:** including working with clients to ensure they maximize their net after-tax returns

- **Growth Portfolio Management:** includes the custom-design and management of growth-oriented portfolios of individual stocks, Exchange Traded Funds (ETFs), Closed-End Funds, and Index Funds for each client
- **Income Portfolio Management:** involves the customization of income-oriented portfolios for clients seeking a steady stream of income

Sleep Well At Night (SWAN) Approach

Capital Investment Advisors follows a proprietary approach to income investing, which this Atlanta wealth management firm calls its [SWAN Approach](#).

The focus of this approach is to help clients focus and achieve their longer-term financial objectives without taking unnecessary risks.

Instead of luring in clients with flashy products and risky strategies, this wealth management firm in Atlanta is all about earning the trust of their client's, helping them secure their financial future, and reach their financial goals.

Highly Diverse Skills

The collective expertise of the CIA team makes them one of the more diverse team of financial planners in Atlanta.

The [team](#) brings together highly qualified individuals who include Certified Financial Planners (CFPsTM), an investment specialist, Certified Public Accountants (CPAs), a Chartered Financial Analyst (CFA), a Real Estate specialist, taxation experts, and small business owners.

This diverse skill set is what helps this wealth management firm in Atlanta address a broad array of client concerns and needs.

Teamwork

While many financial advisors in Atlanta may have a single representative working with each client, Capital Investment Advisors uses a team approach to deliver a full set of services to its clients.

By leveraging all of the skills available within their Atlanta wealth management firm, they ensure clients receive well-rounded advice to address a unique set of financial situations.

Focus on Education

Not only does the CIA team offer financial advice to its clients, but the firm believes strongly in educating clients about the approaches being proposed and the strategies being followed as well.

This makes it easier for clients to understand and appreciate the advice of their Atlanta financial planner.

Going Against the Grain

As a financial advisor counseling clients in Atlanta, it is sometimes difficult to espouse strategies that aren't seen as "populist." Nevertheless, the CIA team does just that, by questioning conventional wisdom and challenging temporary "hot trends."

Capital Investment Advisors uses an investment philosophy that is based on potential for longer term growth, while taking strategic advantage of short-duration trends.

[Related: Best Financial Advisors in Oklahoma City & Tulsa, Oklahoma](#)

Creative Financial Group Review

[Creative Financial Group](#) (CFG) is a top financial advisor with offices in Atlanta, Georgia, and Birmingham, Alabama. The firm has been providing a range of investment advisory and financial planning services to business owners, executives, families, and high-net-worth individuals since 1988.

The company distinguishes itself from other wealth managers in Atlanta by:

- Building personal trust between its clients and the advisors who serve them.
- Providing a broad range of expertise in-house that clients can tap into.

- Conducting a comprehensive analysis of a client's current financial status, with subsequent follow-on reviews of financial goals on an ongoing basis.

The CFG group consists of a [team](#) of financial planners in Atlanta who bring a wealth of experience in a broad range of financial disciplines, including retirement planning, financial planning, tax planning, executive compensation, cash flow analysis, asset management, insurance, and more.

They are a [fee-based](#) company, but we have included this Atlanta wealth management firm for the reasons highlighted below.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Company in Atlanta

Below are key factors that enabled this advisory firm to rank as a top wealth management firm in Atlanta.

Extensive Experience

CFG has been serving clients as financial advisors in Atlanta and beyond for over two decades. As a result, the advisory team has extensive experience in customizing their services to meet the unique financial goals and ambitions of a broad segment of clients.

Well-Defined Process

As a seasoned financial planner in Atlanta, the company has perfected a well-defined and efficient process to initiate and manage both financial planning and wealth management engagements with individuals and companies. The process consists of the [following steps](#):

- 1. Initial Meeting:** An assessment of whether financial planning is appropriate
- 2. Proposal:** A formal proposal with a fee schedule is developed at which point clients can ask questions
- 3. Evaluation:** Tax and financial situation are assessed to develop a comprehensive financial plan
- 4. Review:** Delivery and discussion of the financial plan, review of the action items, and conversation about implementation

5. Follow-Up: Monitoring and reviewing of implementation and progress

Broad Range of Services

Clients looking to work with financial advisors in Atlanta that offer a diverse set of services will find exactly what they need at CFG. The firm's [services](#) include:

- Corporate-sponsored executive benefit programs
- Investment planning and management
- Financial planning, including income tax planning, cash flow management, retirement planning, investment planning, risk management, benefit consultation, transition planning and estate and gift planning
- Income tax return preparation
- Business advisory services, which includes risk management, business continuation strategies and income tax planning and tax return preparation

Strong Alliances

While serving clients as an independent Atlanta financial advisor, CFG is a division of [Synovus Securities, Inc.](#), a firm of renowned broker-dealers, investment bankers, and capital market specialists that have been in business since 1985.

This relationship enables CFG clients to leverage the kinds of synergies that few wealth management firms in Atlanta can offer.

Homrich Berg Wealth Management Review

[Homrich Berg Wealth Management](#) is a firm that believes in balance and comprehensiveness. Firms tend to fall into one of two categories. They are either big on investments, but unmotivated by rigorous financial planning or they specialize in financial planning but shy away from serious investing.

Homrich Berg Wealth Management believes that as a financial planner in Atlanta it should be providing its clients guidance about both. Additionally, they are committed to transparency and putting their clients first.

They validate this claim by operating as a fee-only wealth management firm in Atlanta. This means no commissions and no incentive to push products on clients.

This financial planner in Atlanta has maintained its status as a [fee-only](#) firm from inception to the present day and even after reaching an impressive \$4 billion in assets under management.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Atlanta

Strategic Investment Management

Investing comes with a lot of questions. Blindly putting your money in the market is a recipe for disaster, but you can create some serious wealth if you put your money in the right places using the right advice.

This is why finding a wealth management firm in Atlanta is particularly important for those with money to put away.

But even after you've committed to growing and preserving your wealth there are a whole host of other questions. The Atlanta financial planners at Homrich Berg can [help you answer](#) some common, but confusing questions like:

- How should my assets be invested?
- How much risk should I be taking?
- What kind of returns do I need to see in order to reach my goals?
- Are active managers worth it with the availability of roboadvisors?

You meet regularly with your Atlanta financial advisors at Homrich Berg to determine what your financial goals, time horizon, and risk exposure are so that they can design a suitable plan.

These meetings will help you and your team of financial planners in Atlanta determine how you should allocate your assets and which specific strategy you should use.

This wealth management firm in Atlanta also has an internal investments team that provides the latest updates on asset classes and relevant factors that may affect clients' portfolios.

Since they are not outsourced, they are dedicated to and accessible to the Atlanta financial planners at Homrich Berg.

Comprehensive Financial Planning

Proper financial planning is what makes all of those strategic investments matter. You want to make sure the wealth you grow is in alignment with your goals, dreams, and major life events.

You also have your legacy and your family to think about. Homrich Berg's financial planners in Atlanta offer services to meet these needs.

These financial advisors in Atlanta can help you determine:

- How much money you will need to live comfortably in retirement
- How much risk you need to take in order to reach your goals
- How to maximize income while minimizing taxes
- How to pass down your wealth to future generations

The team at this wealth management firm in Atlanta will also take easily forgotten factors into consideration including liquidity needs, philanthropy goals, and cash flow needs into consideration when drafting your unique financial planning.

HB Online

Homrich Berg offers a consolidated, interactive reporting system called [HB Online](#) that allows clients to access a multitude of information related to their investments without waiting for quarterly reports or monthly statements. This platform answers common questions like:

- How much have my investments grown this year?
- Which managers are doing well, and what are their benchmarks?
- What is my overall asset allocation?
- How much income has been earned by my portfolio?

Clients with this wealth management firm in Atlanta can access this tool 24/7 via their web browser or an iPad application. Traditional quarterly reports are still provided to customers who use HB Online.

Education Planning

Education is power, and every parents wants to break down any barriers that stand in the way of their children accessing it.

As tuition costs increase, more and more young people are drowning in debt in order to pay for the credentials they need to be competitive.

A wealth management firm in Atlanta can help individuals start planning for their children or grandchildren's educational expenses tomorrow.

These financial planners in Atlanta offer solid guidance with education planning.

They help their clients determine how much they should be putting aside for their children, how to discuss the financial implications of private vs. public education, and what sorts of tax advantaged plans they should be using to meet their goals.

Foundations

Homrich Berg offers customized financial planning for charitable institutions and foundations that want to access financial guidance without the product pushing.

They can also help explain financial and investment strategies to your board without the jargon so that they know enough to feel comfortable with any organizational change in direction.

Popular Article: [Best Financial Advisors in Philadelphia, PA](#)

Modera Wealth Management Review

[Modera Wealth Management](#) is a firm in Georgia that caters to individuals, families, institutions, trusts, and philanthropic organizations. In addition to being a [fee-only](#) wealth management firm in Atlanta, Modera is independent, holds itself to the fiduciary standard, boasts plenty of experience, and provides comprehensive solutions.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Atlanta

High Ethical Standards

When you are entrusting your current fortune and your future wealth to a financial planner in Atlanta, you hope it's with a firm that holds itself to the highest ethical standards. Fortunately, this is what Modera does, and they promote that proudly.

For starters, as a fiduciary this wealth management firm in Atlanta is legally obligated to put your best interests as a client first - above professional advancement and sales goals. (But since they are a fee-only firm, you don't even have to worry about sales goals and commissions in the first place.)

These financial planners in Atlanta provide their commitment to their clients in writing, and any potential conflicts of interest are disclosed. Furthermore, this wealth management firm in Atlanta adheres to the National Association of Personal Financial Advisors (NAPFA) Fiduciary Oath and Code of Ethics.

Integrated Coordination of Wealth Management

Modera describes their wealth management approach as "comprehensive and responsive". These are the perfect words to describe the kind of approach everyone needs from a top Atlanta wealth management firm.

Wealth management encompasses all areas of a person's financial life from investing to retirement planning to estate planning, which is why it needs to be comprehensive. It also needs to be responsive because not only are the markets always changing, but your life (and therefore your goals) are constantly changing as well.

Modera will also coordinate with all relevant parties (i.e. lawyers, accountants) to ensure the services they are providing you are in your best interests. This integrated and comprehensive wealth management service [includes](#):

- Investment management
- Cash flow analysis
- Retirement income planning
- Tax planning
- Education funding
- Estate planning

- Insurance analysis
- Strategic goal planning

Streamlined Methodology to Financial Planning

This wealth management firm in Atlanta provides a [streamlined method](#) so that clients can easily understand the process for developing their financial planning strategy:

1. Identification of Goals
2. Establishment of Financial Plan
3. Integration of Financial Plan with an Investment Strategy
4. Regular Management, Monitoring, and Review

Investment Process

Your Atlanta financial planners at Modera also provide an [investment process](#), much like their streamlined methodology to financial planning, that is easy to follow. It consists of:

1. Evaluating Your Current Goals and Objectives
2. Development an Investment Policy - This takes into consideration your risk tolerance, liquidity needs, allocation guidelines and more.
3. Implementation of Your Portfolio Design
4. Management of Your Portfolio
5. Measurement and Reporting of Results

Oakbridge Partners Review

Having been established as Lesesne Capital Management in 1974, [Oakbridge Partners Ltd.](#) is one of the oldest independent, [fee-only](#) wealth managers and financial advisors in Atlanta.

Over more than four decades, the company has been providing a broad array of financial planning and wealth advisory services to its clients and has earned a reputation as one of the top wealth managers in Atlanta that provides unbiased, straightforward advice in the best interest of its clients.

The company's client base includes individuals, company executives, business owners, retirees and other professionals that have portfolios in excess of [one million dollars](#).

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Atlanta

Below are some key factors that enabled Oakbridge Partners to be ranked a top-rated Georgia wealth management and financial planning firm.

Independent, Objective, Fee-Only Advisory

Oakbridge Partners is an independent, [fee-only](#) Atlanta financial advisor whose sole source of compensation is advisory fees charged to its clients. As such, the company is not obliged to offer its clients products, services, or recommendations that may benefit a third parties.

The sole beneficiary of the objective advice offered are the clients that the Oakbridge team serves.

Personalized Planning

Oakbridge is a wealth management firm in Atlanta that believes in personalizing an investment strategy for each client, based on an individualized Investment Policy Statement (IPS). Personalized portfolios are then built to take into account asset allocation preferences, risk tolerance, and return expectations based on the IPS.

Client-Centered and Relationship-Based

Few clients of financial planners in Atlanta have the opportunity to work with senior leaders in the firm. Because of the firm's client-focused approach, Oakbridge clients receive the benefit of working with seasoned principals of the firm.

Proven Risk Management Process

The team at Oakbridge employs a proven risk assessment process that helps clients make informed and intelligent decisions about the financial risks to their portfolios. This process offers greater peace of mind to clients, while also maximizing security and minimizing concerns about their financial future.

Diversified Team of Experienced Professionals

The highly experienced [team](#) at Oakbridge includes Certified Financial Planners (CFPs®), a Certified Public Accountant (CPA), and legal experts in estate planning and taxation.

Broad Array of Services

At Oakbridge, clients will find an Atlanta financial advisor who offers a broad range of services, including:

- Estate planning
- Retirement planning
- Income tax planning
- Business succession planning

- Executive compensation/stock option planning
- Charitable giving

Read More: [Best Financial Advisors in Cincinnati, Ohio](#)

TrueWealth Review

Formerly known as Windham Brannon Financial Group, [TrueWealth](#) is an independent financial advisor in Atlanta that has been serving its loyal clients for over 15 years.

This name change was largely undertaken to highlight the company's commitment as an Atlanta wealth management company that holds true to its values of providing truly independent financial planning and wealth advisory services to its clients on an ongoing basis.

This wealth management firm in Atlanta uses a highly structured methodology to understand client needs, develop highly personalized solutions to meet those needs, and to implement, monitor, and evaluate progress along the way.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Atlanta

Below are some key factors that enabled TrueWealth to be ranked a top Atlanta wealth management firm.

Independent, Fee-Only Financial Planning & Wealth Advisory

TrueWealth is a wealth management firm in Atlanta that offers independent, [fee-only](#) advice to its clients. Depending on the complexity of the advice required, planning fees may range [between \\$1500 and \\$5000](#).

Wealth management fees are based on a percentage of the portfolio under management and may vary between 0.25% per quarter (for the first \$2 million) to 0.125% per quarter (for portfolios in excess of \$5 million).

Guiding Principles

As a financial advisor in Atlanta, TrueWealth employs a set of four guiding principles to enable clients to understand and prioritize their financial goals and objectives, and to then make informed decisions about their wealth.

— Our Guiding Principles —



Using these fundamental beliefs, the company's financial advisors in Atlanta deliver a positive impact on the lives of the clients they serve.

Diversity in Practice

Women in search of Atlanta wealth management firms specializing in women's financial needs will find a perfect partner in TrueWealth.

Over 50% of the Atlanta financial advisors in the firm are women who have a deep understanding of and empathy for women—including women who have come into an inheritance, been widowed, or have climbed the ladder to become female executives.

Recognized Team of Professionals

The TrueWealth team includes six members whom the well-respected *Atlanta* magazine [has honored](#) with its prestigious Five Star Wealth Management Award.

Exceptional Continuity of Service

Clients of wealth management firms in Atlanta and elsewhere across the USA are used to encountering ever-changing leadership teams within the firms that serve them.

TrueWealth bucks that trend. Since the company was founded, its entire leadership team has been continually associated with the firm, providing exceptional continuity of service to its clients.

Committed to Customer-Focused Growth

It is remarkable to see a financial advisor in Atlanta that is committed to growing the firm by providing enhanced customer service. On the average, TrueWealth adds a new client service team to its folds—equivalent to three employees—every 18 months.

This strategy not only grows this Atlanta wealth management firm, but also creates a deeper bench of future associates, advisors, and wealth managers who have a ground-up perspective of serving the firm's clients.

White Horse Advisors Review

[White Horse Advisors](#) was established in 2014 as a financial advisor in Atlanta that provides a range of financial planning and wealth management services to two distinct sets of clients:

- Business owners
- Retirement plan committees

In 2010, the company registered with the U.S. Securities and Exchange Commission (SEC) as a Registered Investment Advisor (RIA), cementing its status as an Atlanta financial advisor that offers [fee-only](#), product-neutral financial advice and services to its clients.

As an independent wealth management firm in Atlanta, White Horse Advisors serves individuals, including the estates, trusts, and retirement accounts of high net-worth clients.

The company also provides a range of services to business entities and corporations, including profit sharing and pension plans.

As a fee-only financial advisor in Atlanta, White Horse Advisors charges clients a fee based upon the market value of each portfolio. For some services, an additional minimum advisory fee may also be applicable.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Atlanta

Below are some key factors that enabled White Horse Advisors to be rated a top wealth management firm in Atlanta.

Independent, Fee-Only Registered Investment Advisor (RIA)

White Horse Advisors is an independent, [fee-only](#) financial planner and wealth manager in Atlanta. The company is also an SEC Registered Investment Advisor (RIA), which allows the firm to offer objective, unbiased financial planning and wealth management services to its clients.

Fiduciary Duty

White Horse [works in partnership](#) with CoVerity as co-fiduciary advisors to its retirement plan committee clients. In this capacity, the company follows a well-defined strategy for ensuring that clients are always in compliance with the maze of complex legal requirements for the industry and also advises clients on the adoption of industry best practices.



Qualified Staff

As one of the top rated Atlanta financial advisors, the White Horse [team](#) comprises of highly experienced professionals who have some of the industry’s most prestigious accreditations and designations, including Certified Financial Advisor (CFA™), Certified Public Accountant (CPA), and Certified Financial Planner (CFP™).

Well-Established Practice

Having been founded in 2014, White Horse is one of the more established financial advisors in Atlanta, serving over 100 clients and with more \$1.1 billion in pension assets under its advisement.

Business Owner Investor Model

White Horse Advisors makes the transition to investor as easy as possible for business owners by providing their business owner investor model as a guide.

It was created to help business owners working with this wealth management firm in Atlanta understand their new role and responsibilities as investors. It also serves as a guide for portfolio management. They outline [specific concepts](#) that business owners will need to familiarize themselves with in order to make a successful transition.

The Three Needs:

- Replacing earned income
- Running a business vs. running a portfolio
- Managing ownership risks

The Eight Realities:

- Business subsidizes lifestyle
- Future liquidity events
- High unrealized taxes
- Hands-on vs. removed
- People dependent vs. market dependent
- One shot at exit
- Concentrated wealth

The Nine Practices:

- Model Income Allocation
- Leverage pre-tax business dollars
- Cut the tails
- Seek investments with roles
- Know your people
- Follow a written investment plan
- Monitor liquid to illiquid balances
- Set a reinvest to receive ratio
- Analyze exit proceeds

Conclusion - Top 10 Best Financial Advisors in Atlanta, Georgia

While selecting a top financial advisor in Atlanta, prospective candidates should be vetted based on the value proposition they offer you.

Most of the Atlanta financial advisors and wealth managers that have been reviewed in this article offer a broad range of services that many business owners, individuals, families, and high net-worth families will find invaluable.

That said, the final decision to work with one of these Atlanta wealth management firms hinges on the unique benefits they can offer you, not to a broad group of individuals.

When commencing your search for wealth managers in Atlanta, it would be prudent to prepare a detailed check list of what you would like to see in your wealth advisor. Then, match that list with the details we have included here for each of the advisors reviewed.

It is highly unlikely that any one of these Atlanta financial planners will meet your needs perfectly. Advisors that meet most of your criteria are the ones you should contact first.

Good luck in your search for your perfect financial advisor in Atlanta!

[Related: Best Financial Advisors in Charlotte & Asheville, NC | Ranking | Top Wealth Managers](#)

Image sources:

- <https://www.bigstockphoto.com/image-19872725/stock-photo-downtown-atlanta%2C-georgia>
- <http://www.brightworth.com/who-we-serve>
- <https://www.yourwealth.com/approach/fee-schedule/>
- <http://www.truewealth.com/>
- <http://whitehorseadvisors.com/retirement-plan-oversight/>

AdvisoryHQ Disclaimer:

Reasonable efforts have been made to present accurate information, however all info is presented without warranty. Review AdvisoryHQ's [Terms](#) for details. Also review each firm's site for the most updated data, rates and info.

Note: Firms and products, including the one(s) reviewed above, may be our affiliates. Click to view our [advertiser disclosures](#).