

Top 11 Best Financial Advisors in Atlanta, Georgia

2016 RANKING OF TOP WEALTH ADVISORS

Finding the Top Financial Advisors in Atlanta, Georgia

Individuals and families in Atlanta are often on the lookout for top Georgia financial advisors and wealth managers who can advise them on effective financial planning or help them invest their money in risk-appropriate investments.

Based on employment statistics from the [Bureau of Labor Statistics \(BLS\)](#), there are about 142 wealth managers and financial advisors per 100,000 residents in Georgia. It's no wonder that finding top financial planners in Atlanta is such a difficult task.

With just a handful of online resources that cover financial advisory 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.



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

- **Anthony Smith Advisors**
- **Berman Capital**
- **Brightworth**
- **Capital Investment Advisors (CIA)**
- **Creative Financial Group**
- **GV Financial Advisors**
- **Harmon Financial Advisors**
- **Oakbridge Partners**
- **Register Financial**
- **TrueWealth**
- **White Horse Advisors**

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

Top 11 Best Financial Advisors in Atlanta, GA

Firm	Location
Anthony Smith Advisors	Atlanta
Berman Capital	Atlanta
Brightworth	Atlanta
Capital Investment Advisors (CIA)	Atlanta
Creative Financial Group	Atlanta
GV Financial Advisors	Atlanta
Harmon Financial Advisors	Atlanta
Oakbridge Partners	Atlanta
Register Financial	Atlanta
TrueWealth	Atlanta
White Horse Advisors	Atlanta

Methodology | Financial Advisors – Atlanta, Georgia

What methodology did we use in selecting this list of best Atlanta financial advisors and top wealth managers in Georgia?

Using publicly available sources, AdvisoryHQ identified a wide range of financial advisors, asset and wealth managers, and financial planners that provide services in Atlanta and surrounding areas.

We then applied AdvisoryHQ's [Breakthrough Selection Methodology](#) to identify the final list of top advisors that provide services to communities in and around Atlanta, Georgia.

Detailed Review – Top Ranking Financial Advisors in Atlanta, Georgia

Below, please find the detailed review of each firm on our list of top advisors and financial planners in Atlanta. We have highlighted some of

the factors that allowed these Atlanta financial advisory firms to score so highly in our selection ranking.

Anthony Smith Advisors Review

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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 leverage the skills of a highly experienced team of professionals. The firm 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 2016 Wealth Advisor

Below are key factors that enabled this advisor to rank as a top 2016 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—and that's a measure of success that all wealth managers in Atlanta aspire to!

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-cutters just don't cut it at Anthony Smith Advisors. The firm's investment portfolios are highly personalized and individually crafted to meet each client's unique goals.

Services Offered:

As an astute fee-only financial advisor operating 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

Logical Approach:

Not every financial planner in Atlanta can claim to deliver exceptional results for their clients all of the time. However, by putting together a 7-step, logical approach to accomplishing those outcomes, the Anthony Smith team makes success more likely.

- Step 1: Clients want to work with a wealth manager in Atlanta who listens to their needs.
- Step 2: They value someone who understands their individual and family backgrounds.
- Step 3: They need help with setting realistic financial goals and building achievable financial plans.
- Step 4: In times of uncertainty, clients will gravitate toward an Atlanta financial advisor who advises and counsels them and helps them solve their problems.
- Step 5: No one likes to be kept in the dark on matters affecting their finances. Constant communication is key!
- Step 6: The unbiased recommendations from an independent, fee-only advisor go a long way toward cementing client-advisor relationships.
- Step 7: And finally, wealth management firms in Atlanta that are prepared to work with a clients' team of other advisors are a sought after commodity!

Anthony Smith has successfully harnessed all of these elements into their logical client-service approach.

Comprehensive Financial Tools:

The company's website hosts an amazing collection of useful resources that clients can take advantage of. These include financial highlights, planning ideas, market-related news and data, and nearly 30 [financial calculator](#)s that can be used when making day-to-day or long-term financial decisions.

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Berman Capital Advisors Review

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



As a financial planner in Atlanta, Mr. Berman leverages his world of experience, including senior management and leadership roles with some of the most prestigious investment and wealth managers in the world such as Goldman Sachs & Co, myCFO, Inc., and Arthur Andersen & Co.

The primary goal of Berman Capital Advisors is to assist high net-worth clients who are looking for objective support from independent financial planners in Atlanta. As one of the top wealth managers in Atlanta, the firm 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 2016 Wealth Advisor

Below are key factors that enabled this advisory firm to rank as a top 2016 financial planning firm in Georgia.

Independent Advice:

As an independent financial advisor in Atlanta, Berman Capital Advisors is not affiliated with any other investment dealer, broker or financial agent. The firm is therefore completely autonomous in its product or service recommendations.

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. Due to the firm's independent status, they have access to a wide range of products, services, platforms and institutional investment managers. This translates to greater choice for the firm's clients.

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 along-side their clients. This commitment leaves no doubt in clients’ minds that the firm has only one group’s interest in mind—the clients’!

Focused Approach:

In today’s investment climate, where returns are hard to come by, many Atlanta wealth managers 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, the firm does not invest its own funds in highly leveraged or speculative ventures—and neither do they risk client funds in such strategies.

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 advisory team 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-ranking 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.

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Brightworth Review

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Brightworth is a fee-only wealth manager in Atlanta that serves 550+ clients in nearly 30 states across the USA. As a top-ranked Atlanta wealth manager, 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 partners 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 firm 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 2016 Wealth Advisor

Below are key factors that enabled this advisory firm to rank as a top 2016 wealth advisory firm in Georgia.

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

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



Top
**Financial
Advisers**
2015

Brightworth named to Financial Times 300 Top Registered Investment Advisors List

Brightworth is pleased to announce its inclusion in the inaugural Financial Times 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 managers in Atlanta.

Global Approach:

Brightworth advisors 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. The firm has put in place 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.

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Capital Investment Advisors (CIA) Review

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Capital Investment Advisors (CIA) is a fee-only financial advisor with offices in Atlanta and Florida. The CIA team 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 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 2016 Wealth Advisor

Below are key factors that enabled this advisory firm to rank as a top 2016 financial advisory firm in Georgia.

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, the 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 – which 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 – which 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 the 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.

Highly Diverse Skills:

The collective expertise of the CIA team makes them one of the more diverse wealth managers in Atlanta. The team brings together highly qualified individuals who include Certified Financial Planners (CFPs[™]), 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 the firm 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 the firm, 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 also believes strongly in educating clients about the approach being proposed and the strategies being followed. This makes it easier for clients to understand and appreciate the advice of their 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." However, the CIA team does just that, by questioning conventional wisdom and challenging temporary "hot trends." Instead, Capital Investment Advisors uses an investment philosophy that is based on potential for longer term growth, while taking strategic advantage of short-duration trends.

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Creative Financial Group Review

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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 comprises of a team of professionals who bring with them 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 many more.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Below are key factors that enabled this advisory firm to rank as a top 2016 Atlanta wealth management firm.

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.

Broad Range of Services:

Clients looking to work with wealth managers 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.

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GV Financial Advisors Review

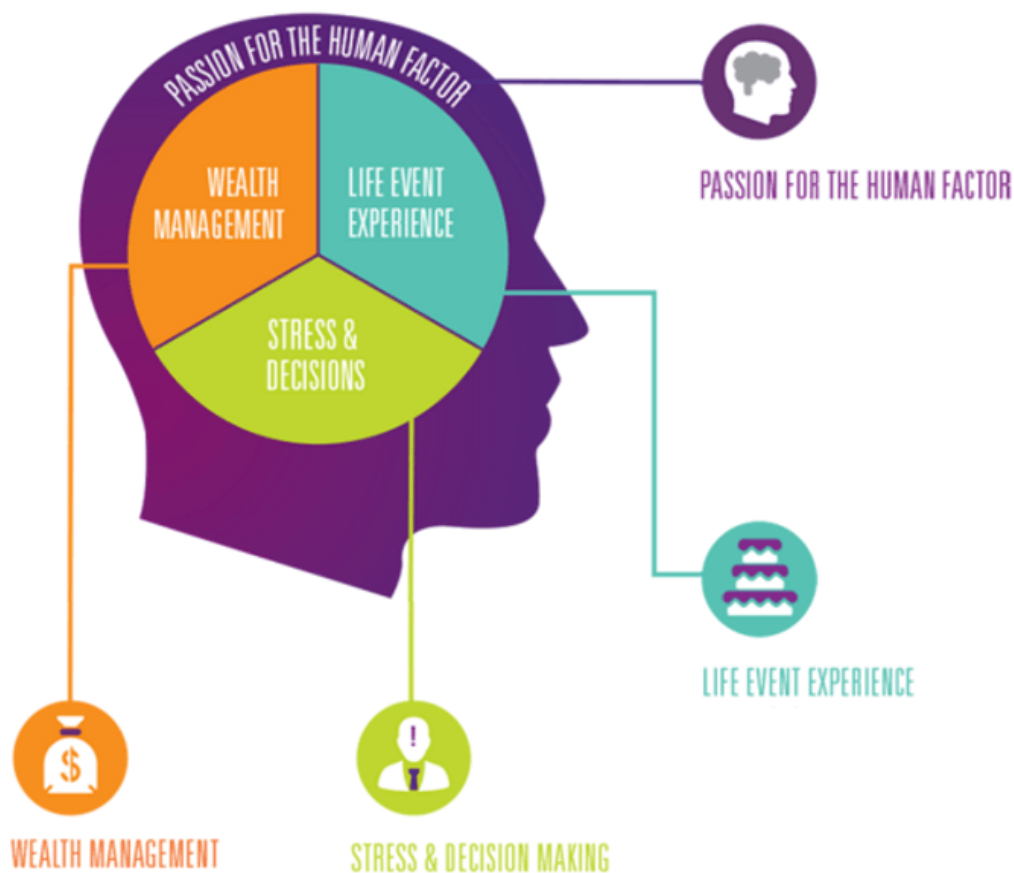
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[GV Financial Advisors](#) operates as an independent financial planner in Atlanta, offering financial planning, wealth management, and financial advisory services to high-net-worth clients.

David and Matthew Geller firmly believed that “traditional” wealth managers in Atlanta and the rest of the country were missing something—the human factor!

The essence of that “missing” component was what drove the Gellers to create GV Financial Advisors in 1991. A 2014 industry assessment ranked the company as the 98th largest independent Registered Investment Advisor (RIA) in the USA.

BEHAVIORAL WEALTH MANAGEMENT



The firm’s philosophy is grounded in what it terms as “passion for the human factor” and is espoused by the company’s pioneering approach to managing wealth—an approach not followed by any other wealth management firm in Atlanta—called Behavioral Wealth Management.

What differentiates the Behavioral Wealth Management approach from that practiced by any other financial advisor in Atlanta is its focus.

Where traditionalists focus primarily on the numbers, GV's approach takes human emotions and other life experiences into account as part of their wealth management process.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Below are key factors that enabled this advisory firm to rank as a top 2016 Atlanta, GA, financial planner.

Independent Registered Investment Advisor (RIA):

GV Financial Advisors is an independent financial advisor in Atlanta that was founded in 1991 by David and Matthew Geller. The company also holds SEC credentials as a Registered Investment Advisor (RIA).

Continuity of Service:

It is hard to come across financial planners in Atlanta who do not experience frequent turnover in staff. At GV Financial Advisors, the company has remarkable continuity in staffing levels, with an average tenure of a team member being 10.5 years. This means the firm's clients enjoy unbelievable continuity of service from team members who are intimately familiar with their needs and challenges.

Well-established Industry-wide Reputation:

Through the years, GV Financial Advisors has earned a reputation of being a well-regarded wealth manager in Atlanta. The company is the proud winner of numerous accolades and awards from industry-watchers and peer groups, including:

- Recognition by Barron's magazine of CEO David Geller as one of America's premier financial advisors, as well as being ranked among the top 30 Georgia financial planners.
- Making REP's 2014 Top 100 U.S Registered Investment Advisors list (ranked by assets under management).
- For the fourth time, making it on the list of top RIAs published by Financial Advisor magazine.
- Being named to the Financial Times' 2014 list of "300 Top Registered Investment Advisers"

Unique Wealth Management Process:

Unlike other wealth managers in Atlanta, GV Financial Advisors uses a unique approach—called Behavioral Wealth Management—to work with clients through key life events. The result: enhanced financial satisfaction through improved overall quality of life.

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Harmon Financial Advisors Review

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Harmon Financial Advisors is an independent, family-owned financial advisor that empowers its clients to “live intentionally.” Using this proactive philosophy, the team at Harmon has been helping clients achieve their financial goals for over 40 years.

The Harmon approach to investment and wealth management is based on three interrelated disciplines—engineering, finance, and economics—all of which have an impact on wealth planning and financial outcomes.

As holistic wealth managers in Atlanta, the Harmon advisory team focuses on five unique areas when helping clients manage their wealth:

- Wealth investment
- Wealth enhancement
- Wealth protection
- Wealth transfer
- Wealth alignment

The firm specializes in offering a broad array of services covering wealth management, investment management and retirement planning.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Below are key factors that enabled this advisory firm to be rated a top 2016 wealth advisory firm in Georgia.

Independent Registered Investment Advisor (RIA):

As an SEC-listed RIA, Harmon Financial Advisors prides itself as being an independent Atlanta wealth manager. This independent status affords the firm the liberty and flexibility to deliver truly autonomous solutions to clients, while also providing clients with unbiased advice free from conflict of interest.

Fiduciary Responsibility to Clients:

Harmon Financial Advisors is committed to upholding the highest fiduciary standards in the industry. This means that, as a client of an independent financial planner in Atlanta, you'll also receive the peace of mind that the advice offered by any Harmon team member will always be in your best interest, never driven by any other considerations.

Lengthy Track Record:

Harmon Financial Advisors has been serving its clients as one of the top financial advisors in Atlanta for nearly four decades. Many of the firm's client relationships date back to the 1970s and 80s, and are still going strong.

Industry-respected Partnerships:

Through partnerships with industry-renowned institutions like Raymond James, Harmon Financial Advisors is able to provide its clients the benefits of a full-service wealth manager, including institutional-level research and cutting-edge technology.

Well-tested Wealth Management Process:

Unlike many wealth managers in Atlanta, Harmon Financial Advisors follows a "dashboard" wealth management approach to measure, manage and communicate with clients.

The company uses an engineering-based methodology to design and manage client portfolios. This process is based on extensive research, the Harmon team's forty years of aggregated wealth management experience and industry best practices.

Atypical Client-Focused Reports:

Harmon Financial Advisors' clients won't receive "typical" brokerage statements from the company. The statements provided by the firm

identify how combined client portfolios relate to each client's unique Investment Policy Statement (IPS). Since financial advisors use the IPS as a building block for customized portfolios, this "atypical" reporting offers clients a unique insight into how the portfolio is doing versus its intended objectives.

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Oakbridge Partners Review

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Having been established as Lesesne Capital Management in 1974, Oakbridge Partners Ltd. is one of the oldest independent, fee-only wealth manager and financial advisor in Atlanta.

We offer the resources to coordinate all of our clients' financial needs, including investment management, sophisticated estate planning, retirement planning and income tax planning.

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 2016 Wealth Advisor

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-centric Relationships:

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

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Register Financial Review

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Register Financial is an independent financial advisor in Atlanta serving clients since it was established in 1992. In addition to traditional brokerage services, the company also offers a host of benefits to its clients using a value-added investment approach.

Through affiliation with Register Financial Advisors, the firm also supports clients as an SEC Registered Investment Advisor (RIA). In addition, the firm has the following professional associations:

- Georgia Securities Association (GSA)
- Member of Financial Industry Regulatory Authority (FINRA)
- Municipal Securities Rulemaking Board (MSRB)
- Member of Securities Investor Protection Corporation (SIPC®)

As a top-rated financial planner in Atlanta, Register Financial also has affiliations with the following professional organizations:

- The Financial Planning Association of Georgia
- American Israel Chamber of Commerce
- The CFA Institute
- Leadership Atlanta
- Atlanta Society of Financial Analysts, Inc. (ASFA)

Through each of these associations and affiliations, Register Financial has built a practice that's rivaled by few other Atlanta financial planners

and wealth managers, offering innovative and unique investment solutions to its clients.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Below are some key factors that enabled this advisory firm to be ranked a top-rated financial planning firm in 2016.

Independent Advice:

Clients looking for independent wealth management firms in Atlanta will find a perfect fit in Register Financial. The firm's independent status enables it to deliver truly objective advice to its clients, unrestricted by any conflicts of interest.

Innovative Approach:

Register Financial leverages the power of information when building and implementing investment strategies for its clients. In addition to traditional Wall Street information used by the typical Atlanta financial advisor, Register Financial also leverages multiple in-house and external informational sources in their financial planning, investment management, and performance reporting and monitoring process.

Integrity:

Associates at Register Financial have willingly affiliated themselves with the firm because of the company's integrity and reputation in the industry. The professionals associated with the firm have proven track records and bring extensive leadership and advisory experience to the table when advising the firm's clients.

As testament to their integrity, the firm's Principals follow their own investment strategies and invest alongside with their clients.

Well-established Client Base:

In business since 1992, Register Financial ranks among the top financial advisors in Atlanta who have created an entrenched base of sophisticated clients. The firm has helped clients successfully preserve and enhance their wealth through the application of both traditional and non-traditional prudent investment and wealth management strategies.

Full-service Advisory Firm:

Not only is Register Financial a well-established financial advisor in Atlanta, but the company also offers a host of value-added services, including retirement planning and personal wealth management in association with well-renowned, industry-respected partners.

Concentrated Portfolio Management:

As a prudent wealth manager in Atlanta, Register Financial believes in limited diversification in its portfolios through concentrated accumulation of small cap investment opportunities. Using a top-down approach in selecting investment opportunities, the firm's portfolio managers monitor each of their investments daily.

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TrueWealth Review

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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 manager that holds true to its values of providing truly independent financial planning and wealth advisory services to its clients on an ongoing basis.

The company 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 2016 Wealth Advisor

Below are some key factors that enabled TrueWealth to be ranked a top-rated Georgia investment management firm in 2016.

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.



Using these fundamental beliefs, the company's advisors 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 personal advisors in the firm are women who have a deep understanding of and empathy for women—including women who have come into an inheritance, widows, and female executives.

Outstanding Client Retention:

As an independent financial planner in Atlanta, TrueWealth holds an enviably high client retention rate. Almost 95% of the clients that this Atlanta financial advisor serves today have been with the company (or its predecessor) since it was founded over 15 years ago.

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 managers 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 in that, 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 the 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.

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White Horse Advisors Review

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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:

- Individual investors
- 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 manager 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.

<i>CoVerity Retirement Plans</i>	
<u>Plan Asset Value</u>	<u>Annual Fee¹</u>
Up to \$1,000,000	0.60% with minimum of \$6,000
\$1,000,000-\$2,500,000	\$6,000 + 0.42% on assets over \$1,000,000
\$2,500,001-\$5,000,000	\$12,300 + 0.21% on assets over \$2,500,000
\$5,000,001-\$7,500,000	\$17,550 + 0.19% on assets over \$5,000,000
\$7,500,001-\$10,000,000	\$22,300 + 0.11% on assets over \$7,500,000
<i>¹ Minimum fee of \$6,000 per year</i>	
<i>Direct Investment Management Services Fees</i>	
<u>Total Account Value</u>	<u>Annual Fee²</u>
Up to \$1,000,000	1.00%
Next \$1,000,000	0.63%
Next \$1,000,000	0.52%
Next \$1,000,000	0.41%
Next \$1,000,000	0.26%
Over \$5,000,000	Negotiable
<i>² All fees are negotiable at our sole discretion.</i>	

Individual White Horse Advisors' clients generally require a minimum of \$250,000 in investible assets. Fees for clients, seeking financial planning assistance independent of any other investment service delivered by the firm, may vary between \$4,000 and \$10,000 depending on the complexity of preparing each plan.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisor

Below are some key factors that enabled White Horse Advisors to be rated a top 2016 Atlanta wealth management firm.

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, with nearly \$1.05 billion in pension assets under its advisement, and nearly \$72 million of discretionary assets under its management.

Disciplined Investment Process:

As highly astute asset allocators and wealth managers in Atlanta, the White Horse team follows a well-defined asset management process that is based on sound discipline and focused on producing long-term results.



The process features thoughtful asset allocation, calculated risk management, and an actively managed portfolio and provides clients with extensive performance summaries and other deliverables.

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Conclusion – Top 11 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, the client. 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. However, the final decision to work with one of them 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!

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Cheers,
AdvisoryHQ Team