
10 Best Financial Advisors & Planners in Atlanta, GA | 2018 Ranking

2018 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN ATLANTA

Intro: 2018 Ranking of the Top Financial Advisors in Atlanta, Georgia

A great 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.

Unfortunately, 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.

Locating 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. 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.

These Atlanta financial planners and wealth managers can advise clients on effective planning, how to balance risk-tolerance with investments, and more.

Whether you are looking for advice for personal finances, retirement planning, investments, or financial goal-setting, you are sure to find an Atlanta financial advisor on our list that's just right for you.



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

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

Financial Advisors in Atlanta	Highlighted Features	Ratings
Anthony Smith Advisors	Comprehensive administrative services	5
Brightworth	Wide range of financial planning services	5
Gratus Capital	Client-centric approach	5
Heritage Financial Planning	Transparent & flexible fee structure	5
Homrich Berg Wealth Management	Education planning	5

Modera Wealth Management	Wealth management coordination	5
Oakbridge Partners	Client-centered and relationship based	5
Resource Planning Group	Comprehensive financial planning & investment management services	5
TrueWealth	Exceptional continuity of service	5
Capital Investment Advisors	SWAN approach	3

Table: Top 10 Financial Advisors in Atlanta | Above list is sorted by rating

Fee-Based vs Fee-Only Financial Advisors in Atlanta

When it comes to evaluating financial advisors in Atlanta, there are typically two types of firms to consider: fee-only and fee-based advisors.

How do you know which type of Atlanta financial advisor is right for you?

Below, we'll provide you with a brief overview of everything you need to know about the differences between fee-based and fee-only financial advisors in Atlanta.

Fee-Only Pricing Structure

When an investment firm or a financial advisor in Atlanta says that they are "fee-only," this means that they *do not* accept commissions or third-party referral payments.

Because an advisor's only source of income comes from the client, a fee-only pricing structure minimizes the inherent conflicts of interest that come along with recommending and selling investment products.

In short, a fee-only financial planner in Atlanta is in a better position to act solely in the interest of their clients.

Fee-Based Pricing Structure

Fee-based firms will receive *some* direct compensation from clients but are free to accept commissions from the companies who provide their financial products.

While a fee-based structure does create some potential conflict, many fee-based investment firms are also fiduciaries, which often counteracts the potential for conflict.

As a fiduciary, a financial advisor in Atlanta is legally responsible to fully disclose any conflicts of interest and are required to put the interests of their clients ahead of their own, regardless of their pricing structure.



Top Atlanta Wealth Management Firms

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 – Best 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.

Click on any of the names below to go directly to the review section for that firm.

- [Anthony Smith Advisors](#)
- [Brightworth](#)
- [Capital Investment Advisors](#)
- [Gratus Capital](#)
- [Heritage Financial Planning](#)
- [Homrich Berg Wealth Management](#)
- [Modera Wealth Management](#)
- [Oakbridge Partners](#)
- [Resource Planning Group](#)
- [TrueWealth](#)

Click below for previous years' rankings:

- **2016 Ranking:** [Top 11 Best Financial Advisors in Atlanta](#)
- **2017 Ranking:** [Top 10 Best Financial Advisors in Atlanta](#)

Anthony Smith Advisors Review

With over 20 years of experience, [Anthony Smith Advisors](#) is a fee-only registered investment advisor in Atlanta.

Anthony Smith Advisors use a well-defined philosophy, leveraging the skills of a highly experienced team of professionals.

While their 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 Anthony Smith to Rank Among the Top Financial Advisors in Atlanta

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.

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, helping clients develop the administrative infrastructure and processes they need to comfortably manage their investments.

These services include:

- Developing a secure system for viewing account balances held at Charles Schwab & Co.
- 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
- Negotiating institutional rates
- Establishing custodian relationships
- Aggregation service to create reports for accounts held outside of Charles Schwab & Co.



Anthony Smith Advisors

Rating Summary

While many financial advisors in Atlanta may use a template-based approach when delivering efficient service, this is not the case at Anthony Smith Advisors.

As a top ranking financial advisor in Atlanta, the firm is committed to building long-lasting relationships with its clients through a flexible, personalized approach, making the firm stand out among competing Atlanta wealth management firms.

With comprehensive services, a fee-only standpoint, and a friendly approach, Anthony Smith Advisors is one of the best financial advisors in Atlanta to consider partnering with this year.

See Also: Best Financial Advisors in Seattle, Bellevue, Kirkland (Washington State)

Brightworth Review

[Brightworth](#) is a [fee-only](#) wealth manager in Atlanta that works with over 1,200 high-net-worth clients and families, providing a broad spectrum of services across an array of financial disciplines.

Founded in 1997, this wealth management firm currently has \$3 billion in assets under management and has added another division in Charlotte, operating under McGill Advisors, Inc.

Key Factors That Enabled Brightworth to Rank Among the Top Financial Advisors in Atlanta

Comprehensive Financial Planning

Part of what makes Brightworth into a top financial advisor in Atlanta is the firm's dedication to providing comprehensive investment and financial planning services. These include:

- Investment Management—Sophisticated investment portfolio to build long-term wealth
- Retirement Planning—Your Atlanta financial advisor will help you transition to the next phase of life with strategic planning
- Cash Flow and Income Tax Planning—Minimize taxes and increase wealth

- Executive Compensation and Related Benefits—Compensation plans, stock options, restricted stock plans, and qualified/non-qualified benefits
- Education Funding—These financial advisors in Atlanta will help you create a tax efficient savings strategy for college
- Risk Management—Review insurance policies and connect clients with insurance specialists as needed
- Business Transition Planning—Strategically position business and ownership to prepare for a sale or transition
- Philanthropy—Determine how philanthropic endeavors can work alongside a comprehensive financial plan
- Estate Planning—Your Atlanta financial advisor will work alongside attorneys to implement financial, charitable, and estate planning tools
- Trust Management—Work with trustees and beneficiaries to coordinate effective strategies

Brightworth’s Fee Transparency

Not many financial advisors in Atlanta practice transparency with their fee structure, but this fee-only advisor certainly does.

Potential clients can easily see the firm’s fee structure before they even sign up for their services, supporting transparency and making it easy for them to fully evaluate the firm.

Brightworth’s [fee structure](#) is readily accessible on their website, and is as follows:

Assets Under Management	Annual Fees
First \$2,500,000	1.00%
\$2,500,001-\$5,000,000	0.75%
\$5,000,001-\$10,000,000	0.50%
Over \$10,000,000	0.30%

Rating Summary

As a top Atlanta financial advisor, Brightworth brings their clients plenty of advantages.

Not only can clients benefit from an impressive array of services, but they can also take advantage of a transparent, fee-only pricing structure. Even better, these fees can be potentially much lower than what competing financial advisors in Atlanta charge their high-net-worth clients.

With unbiased advice and a commitment to transparency, Brightworth is one of the best financial advisors in Atlanta to consider partnering with this year.

Don't Miss: Top Financial Advisors in Portland, Oregon

Capital Investment Advisors (CIA) Review

Founded in 1994, [Capital Investment Advisors \(CIA\)](#) is a [fee-only](#) financial advisor that provides a wide range of financial advisory and portfolio management services.

As a fee-only advisor, all advice offered by the Atlanta financial advisors at CIA is always aligned with the interests of its clients, and no one else.

Key Factors That Enabled CIA to Rank Among the Top Financial Advisors in Atlanta

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 focuses on earning the trust of their clients, helping them secure their financial future, and reach their financial goals.

Focus on Education

Not only do these financial advisors in Atlanta offer one-on-one financial advice, but the firm also provides a range of financial tools and resources to help clients improve their own financial literacy.

Available [online resources](#) from CIA include:

- [Retirement Calculator](#)—Helps clients estimate how much they will need to save for retirement
- [Social Security Optimizer](#)—Provides guidance on the best time to file for Social Security
- [eBook](#)—Free monthly eBook with helpful financial tips
- [Retirement Timeline](#)—Projects a visual map of your financial path to retirement

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.



Top Financial Advisors in Atlanta

Rating Summary

As one of the best wealth management firms in Atlanta, Capital Investment Advisors puts a strong focus on developing one-on-one relationships with their clients, providing individualized attention and ensuring that financial plans are both unique and efficient.

However, compared to competing financial advisors in Atlanta, CIA focuses heavily on investment management and less so on financial planning services.

This narrowed focus significantly limits the firm's service capabilities in comparison to other top-rated financial advisors in Atlanta, earning the firm a 3-star rating overall.

Related: Top Financial Advisors in Phoenix and Scottsdale, Arizona

Gratus Capital Review

[Gratus Capital](#) is an independent, boutique wealth management firm in Atlanta that serves high-net-worth individuals, families, foundations, and endowments.

Although Gratus Capital lists themselves as a [fee-based](#) firm, it's likely that their services are fee-only. The firm maintains membership with the [National Association of Personal Financial Advisors](#) (NAPFA), which is a leading professional association of fee-only advisors.

As always, we recommend that you verify a firm's fee structure before partnering with any Atlanta financial advisor.

Key Factors That Enabled Gratus Capital to Rank as a Top Financial Advisor in Atlanta

Fiduciary Commitment

No matter what type of financial firm, adopting a fiduciary standard is crucial to instilling long-term trust between each client and their Atlanta financial advisor.

Gratus Capital has been a partner firm of [Focus Financial Partners](#) since 2014, a leading partnership of independent, fiduciary wealth management firms.

While Gratus maintains its independence, this partnership illustrates the firm's commitment to putting client needs ahead of their own, effectively counteracting potential conflict from commissions or additional compensation.

Focus on Client Experience

As a boutique wealth management firm in Atlanta, Gratus is able to provide an enhanced client experience, setting the firm apart through their dedication to:

- Providing a tailored, team approach for each client
- Low client to advisor ratio
- Giving thoughtful, well-researched advice
- Treating each client with trust and respect
- Partnership-oriented relationships with clients

This client-centric focus has earned Gratus a number of awards from financial publications, including a spot on *Forbes'* ranking of America's Top 100 Wealth Advisors for 2016 and 2017.



Gratus Capital

Rating Summary

Gratus Capital provides top-notch services, ensuring a personalized and proactive approach to wealth management and financial planning, and earning the firm an overall 5-star rating.

Their client-centric approach is a valuable piece of efficient investment management and financial planning, providing their clients with the dedicated care and attention they need to create a sound financial plan.

Popular Article: Best Financial Advisors in Boston, Massachusetts

Heritage Financial Planning Review

[Heritage Financial Planning](#) is a [fee-only](#) Atlanta financial advisor specializing in personal financial planning, investment management, asset allocation, and stock options planning.

With a mission to empower clients to make sound financial decisions, HFP brings expert guidance, financial education, and industry knowledge to each client relationship.

Key Factors That Enabled Heritage Financial Planning to Rank as a Top Atlanta Wealth Management Firm

HFP's Transparent & Flexible Fees

As a fee-only financial advisor in Atlanta, Heritage Financial Planning operates on a transparent fee structure based on assets under management.

According to the firm's [ADV](#), clients can expect to pay anywhere between 1.00 percent and 0.50 percent for asset management. Interestingly, minimum annual fees will differ depending on the financial advisor that a client works with, ranging between \$3,000 to \$10,000.

These varied minimums make it easy for low and high-net-worth clients to access asset management services, demonstrating a unique flexibility from these financial advisors in Atlanta.

Clients can also choose between hourly and fixed fee arrangements for financial planning and consulting services, the costs of which are clearly outlined in their ADV.

Experienced Team

The Heritage Financial Planning team is highly experienced in the financial industry, with each member of the financial planning team carrying the Certified Financial Planner™ designation, among other professional certifications.

HFP also maintains a Wealth Enhancement Team, which consists of a Certified Admissions Advisor and a Social Security Specialist.

This enables the firm to provide college funding advice and tax planning, adding unique value to their Atlanta financial advisory services.

Rating Summary

As a fee-only and independent financial advisor, Heritage Financial is not driven by sales or commission-based advice, earning their clients' trust and empowering them to make the best financial decisions possible.

This drive to provide increase financial literacy and confidence is clearly seen through their [Resource Center](#), a selection of videos and presentations to support financial education.

With a talented and experienced team, flexible pricing options, and a fee-only commitment, HFP earns a full 5-star rating as one of the best financial advisors in Atlanta.

Read More: Top Financial Advisors in Houston, Texas

Homrich Berg Wealth Management Review

[Homrich Berg Wealth Management](#) is a [fee-only](#) fiduciary firm that believes in balance and comprehensiveness.

Many financial advisors in Atlanta are either big on investments, but unmotivated by rigorous financial planning, or they specialize in financial planning but shy away from serious investing.

In contrast, Homrich Berg Wealth Management believes that, as a financial planner in Atlanta, it should be providing clients guidance about both, providing a truly comprehensive wealth management experience.

Key Factors That Enabled Homrich Berg to Rank Among the Top Financial Advisors 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.

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 to reach my goals?
- Are active managers worth it with the availability of robo-advisors?

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, philanthropic goals, and cash flow needs when drafting your unique financial planning.



Homrich Berg Wealth Management

Rating Summary

For clients that need a comprehensive, holistic overview of their financial health—including investment management and financial planning—Homrich Berg Wealth Management is a great fit.

Their fee-only pricing structure and fiduciary commitment embody the idea structure for unbiased, client-centric service, solidifying their 5-star rating as one of the top financial advisors in Atlanta.

Related: Top Financial Advisors in Tampa, St. Petersburg, and Palm Harbor, Florida

Modera Wealth Management Review

[Modera Wealth Management](#) is an Atlanta financial advisory firm 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 Modera to Rank as a Top Atlanta Wealth Management Firm

Wealth Management

The Atlanta financial planners at Modera offer comprehensive wealth management services for their clients. Because no two clients are alike, no two plans are alike either.

Modera clients benefit with integrated coordination when they seek wealth management services from this Atlanta financial advisory firm. Specific wealth management services include:

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

Modera's team of financial planners in Atlanta will also collaborate with any financial or legal professionals you are currently working with to provide a well-rounded approach to your wealth management.

Comprehensive & Responsive Financial Planning Process

Modera's financial planners follow a streamlined methodology established by this Atlanta wealth management firm. This process provides organization as well as providing transparency in the client-advisor relationships.

Their [streamlined methodology](#) works as follows:

- Identify, understand, and prioritize personal goals
- Gather plan for financial data
- Analyze & develop financial plan and investment strategy
- Implement recommendations
- Monitor strategies
- Communicate and update changes

Rating Summary

Whether it's helping clients save for retirement, buying a second home, or planning an extended trip, this financial advisor in Atlanta puts a strong emphasis on collaborating with clients to create personalized financial solutions.

With an independent mindset, fiduciary commitment, and a fee-only structure, Modera is one of the top financial advisors in Atlanta to consider partnering with this year.

Don't Miss: Best Financial Advisors in Toronto, Canada

Oakbridge Partners Review

With roots tracing back to 1974, [Oakbridge Partners Ltd.](#) is one of the oldest independent, [fee-only](#) wealth managers and financial advisors in Atlanta.

The firm provides 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.

The company's client base includes individuals, company executives, business owners, retirees and other professionals that have a portfolio value of at least \$500,000.

Key Factors That Enabled Oakbridge Partners to Rank Among the Top Financial Advisors in Atlanta

The Oakbridge Advantage

There are a number of distinct advantages that come from partnering with Oakbridge Partners, which include:

- **Independent**—As an advisor-owned firm, Oakbridge is completely independent, and brings over 40 years of experience
- **Unbiased Advice**—As a fee-only fiduciary, clients can trust that their accounts are managed with their sole interests in mind
- **Relationship Based**—Transparency and trust are key to what Oakbridge does, which is why each client works directly with Principal financial advisors in Atlanta and receives customized financial plans

Comprehensive Wealth Management

At Oakbridge, clients will find an Atlanta financial advisor who offers comprehensive wealth management through a broad array of capabilities, including:

- Asset Allocation
- Investment Selection
- Investment Psychology
- Income Taxes
- Estates & Trusts
- Cash Flow
- Insurance
- Pre-Retirement
- Retirement
- College Saving
- Social Security

This wide range of service offerings allows clients to receive a truly in-depth, comprehensive experience, providing both wealth management and financial planning capabilities in one convenient location.



Oakbridge Partners

Rating Summary

As a fee-only financial advisor in Atlanta with a fiduciary commitment, clients can partner with Oakbridge with peace of mind that comes from a transparent fee structure, unbiased advice, and a principled foundation to always act in their client's best interest.

With a wide range of expert financial capabilities to choose from and four decades of experience, Oakbridge Partners is one of the top financial advisors in Atlanta to consider this year.

[Popular Article: Top Financial Advisers \(IFAs\) in Manchester and Cheshire, United Kingdom](#)

Resource Planning Group Review

Founded in 1991, [Resource Planning Group](#) is a fee-only financial advisor in Atlanta offering comprehensive financial planning and investment services.

As a boutique firm, RPG prides itself on providing a personalized planning experience, resulting in dynamic, long-lasting client relationships.

Key Factors That Enabled Resource Planning Group to Rank as a Top Atlanta Wealth Management Firm

Comprehensive Financial Planning & Investment

Part of what makes RPG stand out among competing financial advisors in Atlanta is their dedication to providing well-rounded planning and investment services. These include:

- Portfolio Management
- Cash Flow Planning
- Charitable Giving
- Tax Planning
- Insurance Planning
- Estate Planning
- Education Planning
- Retirement Planning

Each of these services is provided from a solid foundation of education, tailored planning advice, and coordination.

This ensures that clients are empowered to understand their financial health, that they receive meaningful advice for their unique situation, and that other professional advisors can be brought in for collaboration as needed.

The RPG Difference

Compared to working with larger financial advisors in Atlanta, GA, RPG offers clients a highly personalized, relationship-driven approach.

This is a great way to not only instill trust between a client and their Atlanta financial advisor, but it also supports communication and transparency, two vital aspects of any successful financial plan.

The basic tenets of the RPG difference can be surmised in three distinct advantages:

- People—The Atlanta financial advisors at RPG are highly credentialed, experienced, proactive, and dedicated
- Values—RPG holds fee-only service, positive client relationships, education, and responsiveness as core values
- Approach—Investments are low-cost, diversified, tax-efficient, and based on rigorous research



Resource Planning Group

Rating Summary

For clients that are partnering with an Atlanta financial advisor for the first time—or for those that value personal relationships—Resource Planning Group is a great fit.

Their client-centric philosophy is just as multi-faceted as their service listing, earning RPG a 5-star rating as a top fee-only financial advisor in Atlanta.

TrueWealth Review

Formerly known as Windham Brannon Financial Group, [TrueWealth](#) is a [fee-only](#), independent financial advisor in Atlanta that has been serving its loyal clients since 1999.

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 TrueWealth to Rank Among the Top Financial Advisors in Atlanta

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 percent of the Atlanta financial advisors in the firm are women who have a deep understanding of and empathy for women. This includes those who have come into an inheritance, been widowed, or have climbed the ladder to become female executives.

Although TrueWealth does not have specialized services for their female clients, the high percentage of women advisors provides the firm with a unique advantage, particularly in an industry where women financial advisors are historically underrepresented.

TrueWealth's Detailed Investment Philosophy

Part of what makes TrueWealth one of the top financial advisors in Atlanta is their detailed investment philosophy, broken apart into [10 Drivers](#):

- Embrace market pricing
- Don't try to outguess the market
- Resist chasing past performance
- Let the markets work for you
- Consider the drivers of returns
- Practice smart diversification
- Avoid market timing

- Manage your emotions
- Look beyond the headlines
- Focus on what you can control

Providing clients with such a detailed breakdown of their investment philosophy demonstrates a thorough commitment to transparency that is rarely seen in the financial industry, setting TrueWealth apart from competing financial advisors in Atlanta.



Top Atlanta Financial Advisor

Rating Summary

As a fee-only wealth management and financial planning firm, TrueWealth provides a welcoming environment for new and seasoned investors alike, making them a top choice for an Atlanta financial advisor.

We also liked that their website is clean, bright, and easy to navigate, allowing potential clients to efficiently evaluate their services before partnering with TrueWealth.

With an award-winning team, a fee-only structure, and detailed philosophies for investing and financial planning, TrueWealth earns a 5-star rating as a top financial advisor in Atlanta.

Conclusion - Top 10 Best Financial Advisors in Atlanta, GA

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 financial planners in Atlanta, it would be prudent to prepare a detailed checklist 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. 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!

Rate Table Disclaimer

Click here to read AdvisoryHQ's [disclaimer on the rate table\(s\) displayed](#) on this page.

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