
11 Best Financial Advisors & Planners in Atlanta, GA | 2019 Ranking

2019 RANKING & REVIEWS BEST FINANCIAL ADVISORS IN ATLANTA

2019 Top-Rated Atlanta Financial Advisors, Financial Planners & Wealth Managers

Atlanta, Georgia is a bustling southern metropolis that's been host to Super Bowls and the Olympics and is home to the world's busiest airport. If you're one of its residents and are thinking about planning for your financial future, finding one of the top financial advisors in Atlanta is important.

Great financial planners in Georgia can make all the difference in helping individuals, families, and businesses manage their finances, grow their wealth, and plan for a comfortable retirement.

Locating your perfect financial advisor in Atlanta can be difficult if you aren't familiar with the city's financial planning landscape or what to look for when it comes to fee structure or client type.

There are limited resources online that can guide you through the process of finding and choosing the best Georgia financial advisor. That, plus the time needed to research each firm's history, staff, and expertise, can make it a difficult task and one that may be put off.

But the longer you delay getting your financial portfolio in shape, the less time you have to save and plan for your financial future.

The good news is that AdvisoryHQ has done the research for you for and we're bringing you the best wealth management firms in Atlanta. We've taken a look at the key factors that go into a great financial advisor and have chosen and ranked the best firms accordingly.

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

We've also included a primer on the important difference between "fee-based" and "fee-only" advisors and what it means to be a fiduciary. This will ensure you go into your Atlanta financial planner search eyes wide-open.

Whether you are looking for investment advice, retirement planning guidance, business financial support, or financial goal-setting, there's an Atlanta financial advisor on our list that's just right for you.



Award Emblem: Top 11 Best Financial Advisors in Atlanta, GA

Top 11 Best Financial Advisors in Atlanta, GA | Brief Comparison

Top Financial Advisors in Atlanta, GA	2019 Ratings
Anthony Smith Advisors	5
Brightworth	5
Gratus Capital	5
Heritage Financial Planning	5

Homrich Berg Wealth Management	5
Modera Wealth Management	5
Oakbridge Partners	5
Resource Planning Group	5
Rollins Financial	5
TrueWealth	5
Capital Investment Advisors (CIA)	3

Table: Top 11 Financial Advisors in Atlanta | Above list is sorted by rating

Fee-Based vs Fee-Only vs Fiduciary Financial Advisors in Atlanta

There are three important terms that you'll want to fully understand before you begin your search for a top-rated financial advisor in Atlanta, GA.

They are related to how firms earn their fees and the type of commitment they have to their clients. These terms are fee-only, fee-based, and fiduciary.

Here's a synopsis of what each one means and how they denote different types of Atlanta financial planners.

Fee-Only

An Atlanta financial advisory firm that states they are "fee-only" is one you can trust to not be selling you financial products because they're earning a separate commission.

Fee-only means they get their compensation only from client fees and do not accept commissions from third parties that have financial products for sale. This gives clients peace of mind that they have no ulterior motives in recommend a particular product.

In short, fee-only wealth management firms in Atlanta do not have any conflicts of interest that accepting commissions could cause which instills an extra level of comfort.

Fee-Based

Financial advisors in Atlanta that are fee-based earn compensation both from client fees and can also accept commissions from selling third-party financial products.

This type of fee structure can have some perceived conflicts of interest due to an investor not knowing if their advisor is recommending any particular financial product in order to earn a commission.

Some fee-based firms will also become fiduciaries in order to counteract the inherent conflict of interest and put clients at ease that they have their best interests at heart.



Top-Rated Atlanta Financial Advisors

Fiduciary

A fiduciary Atlanta financial advisor can work under either a fee-based or fee-only structure. By being a fiduciary, the financial advisory firm takes on a legal commitment to complete fee transparency.

A fiduciary is also legally obligated to put the interests of their clients ahead of their own and always give financial advice and recommendations with that in mind.

2019 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 2019 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](#)
- [Gratus Capital](#)
- [Heritage Financial Planning](#)
- [Homrich Berg Wealth Management](#)
- [Modera Wealth Management](#)
- [Oakbridge Partners](#)
- [Resource Planning Group](#)
- [Rollins Financial](#)
- [TrueWealth](#)
- [Capital Investment Advisors \(CIA\)](#)

Click below for previous years' rankings:

- **2018 Ranking:** [10 Best Financial Advisors & Planners in Atlanta, GA](#)
- **2017 Ranking:** [Top 10 Planners & Investment Firms in Atlanta](#)
- **2016 Ranking:** [Top 11 Best Financial Advisors in Atlanta](#)

Anthony Smith Advisors Review

For over two decades, [Anthony Smith Advisors](#) has been fostering long-term relationships with clients and helping bring their financial dreams to reality.

This Atlanta wealth management firm is a [fee-only](#) registered investment advisor that prides themselves on a personalized and flexible style.

While their clients come from all walks of life—entrepreneurs, executives, trusts and estates, individuals, families—their typical client has a minimum of \$500,000 in investible assets.

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

Independent, Fee-Only Advisory Firm

As a fee-only financial advisor in Atlanta, Anthony Smith Advisors does not accept any commissions. They also have no affiliation with any banks, brokers, insurance companies, or financial services firms.

This means that clients receive objective advice, analysis, and recommendations on their financial management needs without having to worry about any conflicts of interest.

Anthony Smith Advisors' independent status gives their clients throughout the southeast a sense of security that their financial strategy will always be based upon the client's needs and best interests.

Comprehensive Administrative Services

Over time, financial assets can get complicated and harder to track and manage, making it difficult to make timely adjustments to a particular strategy.

Anthony Smith Advisors is an Atlanta wealth management firm that understands this, and they provide unique administrative services to assist clients in comfortably managing 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 & low fee accounts
- Aggregation service to create comprehensive reports for accounts held outside of Charles Schwab & Co.

Rating Summary

You won't have to worry about getting a template-based approach to investing when working with the experts at Anthony Smith Advisors. This financial planning firm in Atlanta takes a personalized approach that focuses on each individual's investing needs.

As a top-ranking financial advisor in Atlanta, the firm has created long-term relationships with over 150 families, which demonstrates a long-lasting trust and strong client-advisor relationship.

With comprehensive services, a fee-only structure, and a friendly, flexible approach, Anthony Smith Advisors earns a 5-star rating as one of the best financial advisors in Atlanta to consider partnering with in 2019.

See Also: Best Financial Advisors in Omaha, Nebraska

Brightworth Review

[Brightworth](#) serves over 1,200 individuals and families throughout the U.S. with their financial management needs. They are a fee-only wealth manager in Atlanta that has an additional office in Charlotte, NC, under the name McGill Advisors, a division of Brightworth.

Founded in 1997, Brightworth currently has \$3 billion in assets under management with 52 employees and 17 firm partners.

They are dedicated to taking care of their clients in the same way they would their own parents. This financial advisor in Atlanta, GA has an outstanding depth of expertise and takes a uniquely personal approach to wealth management.

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

Full Range of Financial Planning Services

One factor that makes Brightworth stand out as a top financial advisor in Atlanta is the firm's dedication to providing a full range of comprehensive investment and financial planning services. These include:

- Investment Management—Sophisticated investment portfolio to build long-term wealth designed by world-class investment managers
- Retirement Planning—Your Atlanta financial planner will help you transition smoothly to the next phase of life with strategic retirement planning
- Cash Flow and Income Tax Planning—Both businesses and individuals receive assistance in minimizing taxes and increasing after-tax 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 to provide protection from unexpected events
- 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 in coordination with attorneys to implement financial, charitable, and estate planning tools
- Trust Management—These financial advisors work with trustees and beneficiaries to coordinate smart, sound strategies



Best Wealth Management Firms in Atlanta, GA

Brightworth's Fee Transparency

It's not always easy to find out what fees you'll be paying a financial advisor in Atlanta before you meet with them. Brightworth's practice of listing all fees on their website is unique and provides excellent fee transparency.

Potential clients can easily view the firm's fee structure before signing up for their services, making it easy for them to fully evaluate this Atlanta wealth manager in advance.

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

Brightworth is a larger firm that retains a personal touch with their clients and as a top Atlanta financial advisor, the firm offers an array of value-added benefits.

Not only can clients take advantage of the impressive range of services which have them covered for just about every financial planning need, but they also know in advance what fees to expect thanks to the firm's fee transparency.

With a fee-only focus and a commitment to providing comprehensive, unbiased advice, Brightworth is one of the top financial advisors in Atlanta to consider working with this year and earns a 5-star rating.

Don't Miss: Top Financial Advisors in Indianapolis, Indiana

Gratus Capital Review

[Gratus Capital](#) chose its name from the Latin term for "grateful steward." The firm is an independent, boutique wealth management firm in Atlanta, Georgia serving high-net-worth individuals, families, foundations, and endowments with their financial needs.

This Atlanta financial advisor is a [fee-only](#) firm that is also a fiduciary. Meaning they take on a legal obligation to always act in the best interests of their clients.

Gratus strives to not only meet but exceed client expectations and to serve with undivided loyalty.

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

Fiduciary Commitment

Atlanta wealth management firms that adopt a fiduciary commitment are a step ahead of others in that they make an extra commitment to always act with candor and in good faith.

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

This collaboration further illustrates this Atlanta financial advisory firm's commitment to serving their clients' best interests always, effectively negating a potential conflict that can come from accepting commissions on financial products.

Focus on Client Experience

Gratus takes a boutique approach to financial planning to ensure their clients receive the benefit of their team's collective knowledge in a client-centric setting. Their philosophy includes a 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 financial planner in Atlanta has been recognized with several awards from financial publications, including being included in *Forbes'* ranking of America's Top 100 Wealth Advisors for 2016, 2017, and 2018.

Rating Summary

With a personalized and proactive approach to financial management, Gratus Capital is a stand-out among Atlanta's wealth management and financial planning institutions, earning the firm an overall 5-star rating.

Their fiduciary commitment solidifies their client-centric philosophy that ensures each client receives personalized care that goes above and beyond. For high-net-worth individuals, families, and organizations, Gratus is a great option to consider in 2019.

Popular Article: Best Financial Advisors in Chicago, Illinois (Ranking)

Heritage Financial Planning Review

Created to bring the best of education and real-world experience together, [Heritage Financial Planning](#) is a [fee-only](#) fiduciary Atlanta financial advisor. They have a talented and experienced team with a blend of several financial specialties.

This wealth management firm in Atlanta also has offices in Dallas and Grapevine, Texas. Their mission is to empower clients to make sound financial decisions and offer money management that provides peace of mind.

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

Transparent & Flexible Fees

Heritage Financial Planning has a transparent fee structure based on assets under management, making it easy for potential clients to know up front what their costs will be.

According to the firm's [ADV](#), clients can expect to pay anywhere between 1.00 percent and 0.50 percent for asset management. The minimum annual fee paid by clients differs according to which of their Atlanta financial advisors a client works with, ranging between \$3,000 to \$10,000.

Their flexible fee models that allow a fixed fee or an hourly rate, make it easy for individuals to pay for just the financial services they need. This financial advisor in Atlanta also welcomes clients at multiple wealth levels.



Atlanta's Top-Rated Financial Planners

Experienced Team

The Heritage Financial Planning team prides themselves on bringing a wide range of financial experience to the table. They feel a diversity in specialties in the financial management industry ensures that their clients receive the best guidance possible.

Key financial advisors at HFP carry the Certified Financial Planner™ designation, among other professional certifications.

Additional resources for clients of this Atlanta financial planner include a Wealth Enhancement Team, which consists of a Certified Admissions Advisor and a Social Security Specialist, offering value-added services for college admissions and more.

Rating Summary

As an independent fee-only Atlanta financial advisor, Heritage Financial pledges to always put their clients first and does not take commissions of any kind. This way of doing business earns their clients' trust that HFP is helping them create the best financial plan possible.

Another highlight of this wealth management firm in Atlanta, GA is their online Resource Center, which is designed to support financial literacy through a selection of educational videos and presentations.

With a talented and experienced team, flexible pricing options (including hourly rates), and a fiduciary commitment, Heritage Financial Planning earns a full 5-star rating as one of the best financial advisors in Atlanta to consider partnering with this year.

Read More: Top Financial Advisors and Wealth Managers in Los Angeles, California

Homrich Berg Wealth Management Review

Founded in 1989, [Homrich Berg Wealth Management](#) is one of the 50 largest registered investment advisor firms in the country. This Atlanta, GA wealth management firm is a [fee-only](#) fiduciary that serves clients in over 40 states.

With three offices in the Atlanta metro area, two in Atlanta and one in Alpharetta, Homrich Berg provides financial guidance to over 1500 families and manages over \$5 billion in assets.

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

Strategic Investment Management

Investing can be confusing, especially when there is unpredictability. Blindly putting your money in the market without proper guidance is a recipe for disaster. But if you work with the right experts to advise you, investments can give you a comfortable financial future.

The Atlanta financial planners at Homrich Berg can help you answer some common investing questions, such as:

- 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?

Homrich Berg advisors will meet with you regularly to determine what your financial goals, time horizon, and risk exposure are so that they can design a personalized plan that will help you reach your goals.

This wealth management firm in Atlanta, GA doesn't just lock in your portfolio and leave it, they understand the need to update investment strategies regularly. Their

internal investments team provides the latest updates on asset classes and relevant factors that may affect clients' portfolios.

Comprehensive Financial Planning

Homrich Berg takes a straightforward and uncomplicated approach to financial planning, which includes three key objectives for your assets – Protect, Grow, Manage.

The financial planning services of this Atlanta wealth manager go well beyond just investing, and include insurance and estate planning, tax and retirement planning, and wealth forecasting and administrative services.

These financial advisors in Atlanta can help you determine:

- How much money you will need for a comfortable retirement
- How much risk makes sense in order to reach your goals
- How to maximize income while minimizing taxes
- How to pass down your wealth to future generations

Rating Summary

For clients looking for a straight-forward, comprehensive approach to financial planning with multiple additional wealth management services, Homrich Berg Wealth Management is a great option.

Their fee-only pricing structure and fiduciary commitment display their commitment to give unbiased and client-focused financial advice, solidifying their 5-star rating as one of the top-rated financial advisors in Atlanta to consider in 2019.

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

Modera Wealth Management Review

[Modera Wealth Management](#) is a 100% employee-owned Registered Investment Advisor (RIA) in Atlanta. This financial advisor caters to individuals, families, institutions, trusts, and philanthropic organizations.

Modera operates under high ethical standards and in addition to being a [fee-only](#) wealth management firm in Atlanta, Georgia, they also take on a fiduciary commitment to serve their clients' best interests.

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

Customized Wealth Management

You won't find any "template" approaches from the Atlanta financial planners at Modera, because they believe no two clients are alike, no two plans are alike either. So, they customize wealth management strategies based on each individual.

Modera clients benefit from holistic and harmonized solutions when they seek wealth management services from this Atlanta financial advisory firm. Specific services offered are:

- 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 work in concert with any financial or legal professionals you already work with to provide a well-rounded approach to your wealth management.

Comprehensive & Responsive Financial Planning Process

Modera's financial planners follow a streamlined methodology designed by this Atlanta wealth management firm. This process provides a framework that clients can understand as they go through each step to craft their perfect financial plan.

Their streamlined methodology steps are as follows:

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

Rating Summary

This financial advisor in Atlanta provides each client with a financial plan as unique as they are. And whether it's helping you save for major dream, buy a second home, or plan an active retirement, Modera puts a strong emphasis on collaborating with clients to create customized financial solutions.

With an independent mindset, a strong client commitment, and a fee-only fiduciary structure, Modera Wealth Management earns a 5-star rating and is one of the best financial advisors in Atlanta to consider partnering with this year.

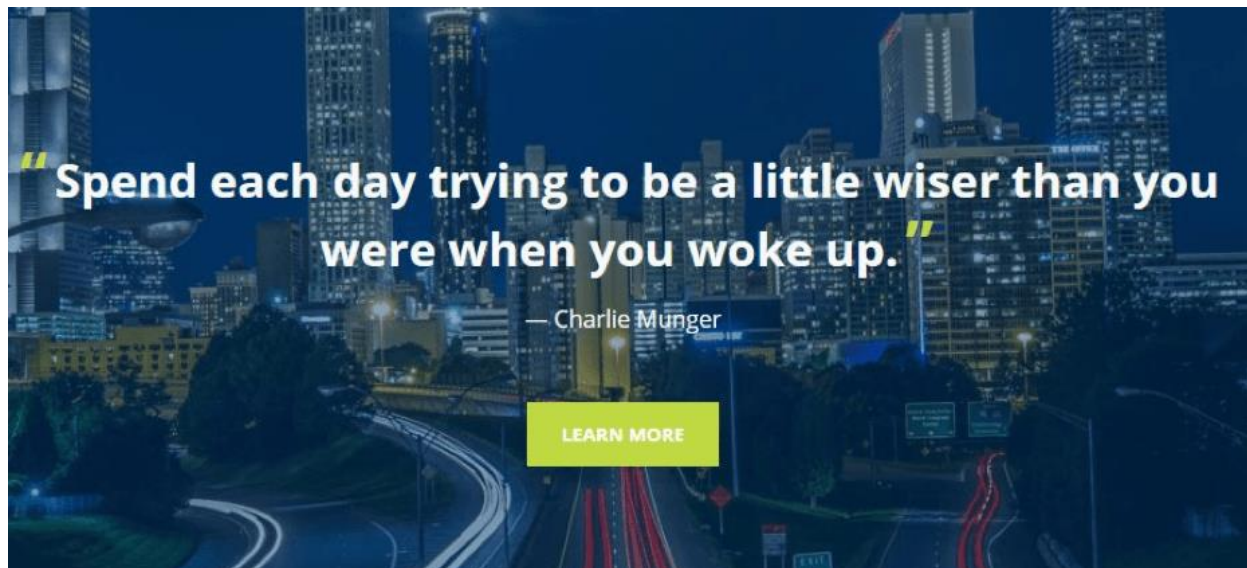
Don't Miss: Top Financial Advisors in Portland, Oregon

Oakbridge Partners Review

With over 40 years of wealth management experience, [Oakbridge Partners Ltd.](#) is one of the oldest independent, [fee-only](#) financial advisors in Atlanta. They provide clients with an open platform of investment options.

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

The firm proudly boasts advisors in multiple generations – Baby Boomers, Gen X'ers, Generation Y, and Millennial – positioning them to connect with clients of all backgrounds and financial advisory needs.



Best Financial Advisory Firms in Atlanta, Georgia

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

The Oakbridge Advantage

Oakbridge Partners has a lot to offer investors looking for a comfortable Atlanta wealth management relationship with a solid foundation of trust. The Oakbridge Advantage includes:

- Independent—Oakbridge is owned by the advisors who service each client and offers 6CFPs®, a CPA, and an estate and tax attorney
- Unbiased Advice—As a fee-only fiduciary, clients can trust that their accounts are managed with their sole interests in mind
- Relationship-Based—Each client works directly with a firm principal on their customized portfolio and financial plans

Comprehensive Wealth Management

At Oakbridge, clients will find an Atlanta financial advisor that can fill any financial need they have with a broad spectrum of services, including:

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

By offering so many complimentary financial services, Oakbridge Partners saves their clients both time and money by giving them a "one-stop shop" for multiple financial needs.

Rating Summary

Oakbridge gives their clients peace of mind that they are always getting advice that is completely in their best interests. As a fee-only financial advisor in Atlanta that also takes on a fiduciary commitment, they show that they're 100% in their client's corner.

With a broad range of expert financial capabilities to offer and a firm that's been serving clients in Atlanta for over four decades, Oakbridge Partners is one of the top-rated financial advisors in Atlanta to consider partnering with this year.

Popular Article: Best Financial Advisors in Minneapolis, St. Paul, and Edina (Minnesota)

Resource Planning Group Review

[Resource Planning Group](#) provides 100% [fee-only](#) financial advisory services in Atlanta. Founded in 1991, this firm is one of the largest NAPFA (National Association of Personal Financial Advisors) firms in Atlanta.

As a boutique firm, RPG prides itself on providing a very different financial planning experience that includes truly tailored financial planning and long-lasting client relationships.

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

Comprehensive Financial Planning & Investment

One thing that makes RPG stand out among competing financial advisors in Atlanta is their dedication to offering 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 service is provided from a solid base of education, tailored planning advice, and coordination.

This ensures that clients are an active participant in their financial health, that they receive meaningful advice for their own unique situation, and that other team members can be tapped for collaboration as needed.

The RPG Difference

A small, but robust firm, RPG offers a completely personalized, relationship-driven approach and considers their clients a family. This welcoming demeanor helps them stand out from other wealth management firms in Atlanta, GA.

This warm approach helps to put clients at ease when they discuss the sometimes uncomfortable subject of finances and allows the RPG's advisors to really get to know their client and their financial needs so they can strategize the best plan.

The basic tenets of the RPG difference can be expressed 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

Rating Summary

For clients that like to be treated like family and have a long-term relationship with their financial advisor, Resource Planning Group is an excellent option. Additionally, their tailored financial strategies ensure each client's distinct financial needs are addressed.

Their client-centric philosophy is just as multi-faceted as the array of services they offer, earning Resource Planning Group a 5-star rating as one of the best fee-only financial advisors in Atlanta.

Rollins Financial Review

[Rollins Financial, Inc.](#) has been putting its clients first for over 28 years. This Atlanta financial advisor is a fee-only independent registered investment advisor that serves individuals, small businesses, and corporations throughout the country.

This wealth management firm in Atlanta, GA prides themselves on taking a disciplined approach to financial planning that is also objective and completely transparent.

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

Client Goal-Oriented

The Atlanta financial advisors at Rollins Financial don't try to give you a "cookie-cutter" financial plan. They get to know your wants, needs, and financial goals first, then tailor a plan to best meet them.

They work with clients at every stage of life, from those just starting out to those getting ready for retirement. They understand life's changing financial needs and create a fluid portfolio that has the flexibility to adjust as your life advances.

No matter where you are in your financial process, you can trust these Atlanta financial advisors to take a streamlined, transparent, and disciplined approach that you can trust.



Atlanta Top Wealth Management Firms

Robust Investment Management

The team at Rollins Financial doesn't just look at your portfolio as dollars and cents, they understand that it's a means of securing your future success and happiness.

Whether you're starting a business, saving for retirement, or looking to transfer wealth after death, their strategic wealth advisory services can help you with the best plan for your long-term goals.

Their investment management encompasses the following:

- Individual Retirement Accounts (IRAs)
- Corporate 401(k) Plans
- Brokerage Accounts
- College Savings Plans

- Trust Accounts

Rating Summary

Not all wealth management firms in Atlanta work with investors at any stage and asset level. This makes Rollins Financial unique and a firm that many can trust to provide with them expert financial advice no matter where they are in life.

Their side-by-side approach to working with clients and strong commitment to always give unbiased advice make Rollins Financial an excellent wealth management firm in Atlanta to consider working with in 2019 and have scored them a 5-star rating.

TrueWealth Review

[TrueWealth](#) was founded in 1999 and serves over 500 individuals and families from their Buckhead, Atlanta, GA location. This [fee-only](#) independent financial advisor in Atlanta manages approximately \$1.5 billion in assets.

The Atlanta financial advisors at TrueWealth use a highly structured methodology to understand client needs, develop customized solutions to meet those needs, and implement, monitor, and evaluate progress each step of the way.



Top-Rated Financial Planners in Atlanta, GA

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

Diverse and Talented Team

Women in search of Atlanta wealth management firms that specialize in their distinct financial needs will appreciate that over 50% of the firm's personal advisors are women.

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

Additionally, six members of TrueWealth's team have been awarded the prestigious Five Star Wealth Management Award by Atlanta magazine, which recognizes leaders in the industry.

TrueWealth's Detailed Investment Philosophy

A differentiator that helps TrueWealth stand out as one of the top financial advisors in Atlanta is their detailed investment philosophy. It provides a guide for clients and helps them develop a disciplined financial attitude.

This philosophy is comprehensively expressed in 10 main 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

Rating Summary

As a fee-only wealth management and financial planning firm, TrueWealth welcomes both new and seasoned investors, making them a great choice for multiple investors as their Atlanta financial advisor.

Additionally, potential clients will find their website easy to navigate with excellent use of graphics, making it easy to efficiently evaluate their services before partnering with this Atlanta financial planner.

With an award-winning team, a fee-only structure, and comprehensive philosophies for investing and financial planning, TrueWealth scores a 5-star rating as a top financial advisor in Atlanta to consider this year.

Capital Investment Advisors (CIA) Review

[Capital Investment Advisors \(CIA\)](#) is a [fee-only](#) financial advisor that's been serving clients in Atlanta since 1996. This wealth management firm in Atlanta offers a wide range of financial advisory and portfolio management services.

The financial advisors at CIA work from four core values, which include knowing their craft, being passionate about what they do, always doing what's right, and believing that every person matters.

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

Sleep Well At Night (SWAN) Approach

Capital Investment Advisors has their own proprietary approach to income investing, which this Atlanta wealth management firm calls the SWAN approach.

This strategy is designed to help clients focus and achieve their longer-term financial objectives without taking unnecessary risks to get there.

This top-rated wealth management firm in Atlanta zeros in on earning the trust of their clients, helping them secure their financial future, and reach their financial goals, rather than using short-term gimmicks.

Focus on Education

Not only do these financial advisors in Atlanta offer personalized financial guidance, but the firm also has several financial tools and resources to boost clients' financial literacy.

CIA's online resources include:

- [Retirement Calculator](#)—Helps clients plan for how much they will need to save for retirement
- [Retirement Timeline](#)—Provides clients with a visual map of a financial plan for retirement
- [eBook](#)—Free monthly eBook with helpful financial tips to retire happily
- [FAQs](#)—Get answers to all your important financial questions

Beyond the financial guidance they provide, CIA believes strongly in educating clients about the approaches being proposed and the strategies being followed, which makes it easier for clients to understand the advice of their Atlanta financial planner.

Rating Summary

As one of the top wealth management firms in Atlanta, Georgia, Capital Investment Advisors puts their clients first as illustrated by their one-on-one relationships and individualized attention to ensure that financial plans are both unique and effective.

However, one thing that leaves them at a slight disadvantage when compared to competing financial advisors in Atlanta is that CIA focuses heavily on investment management and less so on financial planning services.

This narrowed focus limits the firm's service capabilities in comparison to other top-rated financial advisors in Atlanta, earning the firm a 3-star rating overall. However, they still rank among the best investment managers to consider partnering with in 2019.

Related: Top Financial Advisors in Phoenix and Scottsdale, Arizona

Conclusion – 2019 Top 11 Best Financial Advisors & Planners in Atlanta, GA

If you're searching Atlanta for the best financial advisors, these top 11 firms on our list should give you plenty of options for experienced and trustworthy financial managers.

Most of the Atlanta financial advisors and planners we've reviewed in this article can provide clients with a wide array of financial services, whether they're individuals, businesses, or families.

These top-rated financial firms in Atlanta, GA also cover a wide range of income levels, so whether you're just beginning to save or you have a large nest egg already, you'll find a firm on this list that specializes in your distinct financial needs.

It's helpful to know that many Atlanta wealth management firms offer free initial consultations, so it's a good idea to take advantage of meeting face-to-face. This allows you to get a feel for how the firm is to work with and whether they're attentive to your needs.

The most important thing is that in seeking a qualified financial advisor in Atlanta, you're taking the first step toward securing a sound financial future.

Rate Table Disclaimer

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

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