

# ATLANTA BUSINESS CHRONICLE

## THE LIST

### ATLANTA'S 25 LARGEST FINANCIAL PLANNING AND ADVISORY FIRMS

RANKED BY TOTAL ASSETS UNDER MANAGEMENT FOR ATLANTA OFFICE

	Business name Website	Address Phone	Total assets under management for Atlanta office <sup>1</sup>	Of total assets for Atlanta, amount discretionary <sup>1</sup>	Of total assets for Atlanta, amount nondiscretionary <sup>1</sup>	Total assets managed companywide <sup>2</sup>	Number of professionals in Atlanta <sup>3</sup>	Total staff in Atlanta	Chief Atlanta officer(s)
1	<b>Merrill</b> ml.com	3455 Peachtree Rd. N.E., #1000 Atlanta, GA 30326 404-231-2400	\$170.23 billion	\$38.91 billion	\$131.33 billion	\$3.7 trillion	235	577	Steven Alch
2	<b>Morgan Stanley Wealth Management</b> morganstanley.com	3280 Peachtree Rd., #1700 Atlanta, GA 30305 404-266-6300	\$83.99 billion	NA	NA	NA	205	260	Walter Jameson Richard Vaughan
3	<b>J.P. Morgan</b> jpmorgan.com; jpmorgansecurities.com	3424 Peachtree Rd., Atlanta, GA 30326 404-926-2500	\$30.55 billion	\$0	\$0	\$3.3 trillion	126	126	Seth Jones Mike Marino Gina Sorrells
4	<b>Raymond James Financial Inc.</b> raymondjames.com	3050 Peachtree Rd. N.W., #600 Atlanta, GA 30305 404-240-6700	\$27.65 billion	NA	NA	\$1.17 trillion	219	562	Deborah Cicatelli
5	<b>CAPTRUST</b> captrust.com	3348 Peachtree Rd. N.E., #1420 Atlanta, GA 30326 404-201-6472	\$21.53 billion	\$1.78 billion	\$19.75 billion	\$621.38 billion	9	18	Charles Pyke, Jr. Patrick Plunkett Shane Hunter Matt Godleski
6	<b>Homrich Berg</b> homrichberg.com	3550 Lenox Rd. N.E., #2700 Atlanta, GA 30326 404-264-1400	\$10.03 billion	\$9.43 billion	\$606.05 million	\$10.03 billion	73	134	Andrew Berg Thomas Carroll
7	<b>Investment Research &amp; Advisory Group Inc.</b> iragroup.com	1230 Peachtree St., #3800 Atlanta, GA 30309 404-760-3730	\$8.47 billion	\$1.04 billion	\$7.43 billion	\$8.47 billion	8	14	Doug Leeson
8	<b>Northwestern Mutual Goodwin, Wright<sup>4</sup></b> buckhead.nm.com	3438 Peachtree Rd., Phipps Tower, #1200 Atlanta, GA 30326 404-846-3000	\$7.58 billion	\$6.09 billion	\$1.49 billion	\$229.3 billion	106	503	John Wright II
9	<b>Northern Trust</b> northerntrust.com	3282 Northside Pkwy. N.W., #100 Atlanta, GA 30327 404-279-5200	\$5.7 billion	\$3.48 billion	\$2.22 billion	\$1.4 trillion	7	20	Glenn Weiss
10	<b>Iron Capital Advisors Inc.</b> ironcapitaladvisors.com	3355 Lenox Rd., #925 Atlanta, GA 30326 800-417-3804	\$5.3 billion	\$1.31 billion	\$3.99 billion	\$5.3 billion	6	6	Charles Osborne
11	<b>Balentine</b> balentine.com	3344 Peachtree Rd. N.E., #2200 Atlanta, GA 30326 404-537-4800	\$5 billion	\$3.4 billion	\$1.6 billion	\$5 billion	18	34	Robert Balentine Adrian Cronje
12	<b>SignatureFD LLC</b> signaturefd.com	1230 Peachtree St., #1800 Atlanta, GA 30309 404-253-7600	\$4.58 billion	\$4.16 billion	\$414.79 million	\$4.58 billion	92	92	Heather Fortner
13	<b>Berman Capital Advisors</b> bermancapital.com	3445 Peachtree Rd., #1400 Atlanta, GA 30326 404-554-4999	\$4.36 billion	\$1.38 billion	\$2.97 billion	\$4.36 billion	12	31	Kelly Downs Justin Berman Jill Asrael
14	<b>Edge Capital Group LLC</b> edgecappartners.com	3333 Riverwood Pkwy., #350 Atlanta, GA 30339 404-890-7707	\$4.23 billion	\$3.94 billion	\$290.39 million	\$6.39 billion	11	23	Harry Jones Will Skeean
15	<b>Integrated Financial Group Inc.</b> integrated-financial-group.com	200 Ashford Center N., #400 Atlanta, GA 30338 770-353-6400	\$3.75 billion	\$2.65 billion	\$1.1 billion	\$6.42 billion	62	117	Land Bridgers
16	<b>Capital Group Private Client Services</b> capitalgroup.com/pcs	1230 Peachtree St. N.E., #2300 Atlanta, GA 30309 404-685-4230	\$3.26 billion	\$3.16 billion	\$96.8 million	\$39.97 billion	9	17	Sandra Morelli
17	<b>Capital Investment Advisors</b> yourwealth.com	10 Glenlake Pkwy., North Tower, #1000 Atlanta, GA 30328 404-531-0018	\$3.22 billion	\$3.22 billion	\$0	\$3.61 billion	16	32	Wesley Moss Mitchell Reiner Matt Reiner
18	<b>Cardea Capital Group</b> cardeacap.com	3350 Riverwood Pkwy., #2215 Atlanta, GA 30339 770-977-7779	\$3.14 billion	\$113.47 million	\$3.03 billion	\$3.14 billion	1	8	Carolyn LaRocco
19	<b>Capital Directions LLC</b> capdir.com	400 Northridge Rd., #350 Atlanta, GA 30350 404-237-8881	\$3.12 billion	\$2.61 billion	\$509 million	\$3.12 billion	10	23	Dennis Covington Terry Hartigan
20	<b>Buckhead Capital Management LLC</b> buckheadcapital.com	3100 Cumberland Blvd., #1450 Atlanta, GA 30339 404-720-8800	\$3.08 billion	\$2.91 billion	\$171.43 million	\$3.08 billion	10	12	Walter DuPre John Swanson