



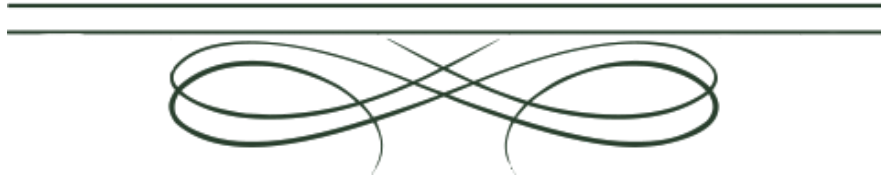
BALLEW

WEALTH MANAGEMENT

(<https://www.ballewwealth.com>)

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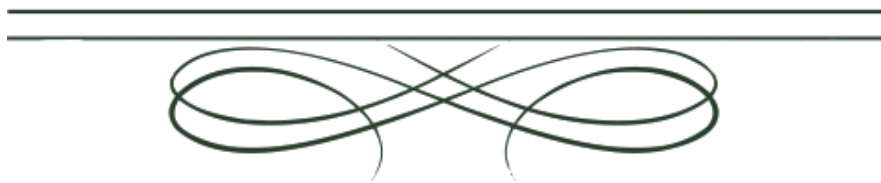
Company Overview



In an ever-changing market environment, now more than ever, investors need to rely upon forward looking investment counsel. Ballew Wealth Management is a privately held firm with experienced forward thinking advisors.

Founded in 1988, Ballew Wealth Management is one of the southeast's preeminent wealth management firms. Advising and entrusted by clients with approximately \$600 million, the firm offers investment advisory, fiduciary, brokerage, and trading services to a diverse clientele, which includes high net worth individuals, corporate sponsored qualified plans, foundations, and trusts. Within this framework, our emphasis is to provide long-term expected returns and to mitigate unforeseen risks that can potentially disrupt investors' goals and objectives. In short, we invest heavily in our clients' trust because when you succeed, we succeed.

Investment Philosophy



We believe portfolios must be created to reflect the current economic conditions and market trends while custom tailored to fit our client's needs. It takes a marriage of the two components to produce portfolios which meet our client's investment goals. With ever increasing market volatility, advisors must have a deep understanding of capital market fundamentals and global macroeconomic perspective to design portfolios to minimize risk along with achieving appropriate risk-adjusted returns. Based on current and prospective economic conditions, Ballew Wealth Management incorporates technical and fundamental market research to select broadly diversified asset classes with the potential to outperform their long-term averages. Our investment philosophy is based on a long-term, disciplined investment approach supported by a thorough understanding of current economic conditions, academic research and most importantly, strong relationships with our clients.



(<https://www.ballewealth.com/services/asset-management/>)

Asset Management

Based on your financial goals and risk profile, we build a custom tailored portfolio strategy that meets your investment goals. As an independent investment advisory firm, we have the commitment to act solely in your best interest...

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Financial Planning

Ballew Wealth Management advisers can help you define your financial and life goals by reviewing your risk profile, resources, and lifestyle. We will guide you on your financial journey to achieve your overall financial goals and help you...

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(<https://www.ballewealth.com/services/private-wealth/>)

Private Wealth Management

Knowledge of the financial markets is just one of many critical components of a successful financial strategy. Ballew Wealth Management's Private Wealth Management offers objective institutional advice in the context of a personal...

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(<https://www.ballewealth.com/services/retirement-plans/>)

Retirement Plans

With a focus on employee education, communication, and investment advice, we deliver turnkey retirement plan consulting, administration, and investment services, offering thousands of quality mutual fund managers over a single...

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(<https://www.ballewealth.com/services/estate-planning/>)

Estate Planning

We coordinate our expertise and resources to provide comprehensive estate analysis and consultation primarily focused on adopting strategies that balance today's income and cash flow needs while reducing estate erosion at...

learn more » (<https://www.ballewealth.com/services/estate-planning/>)



(<https://www.ballewealth.com/risk-management>)

Risk Management & Insurance

A proper financial plan is not complete without the assessment of all possible risks to cash flow, income, and standards of living. We can help you evaluate your risk management to discover gaps in coverage and recommend...

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Check the background of our broker dealer and investment professionals on FINRA's BrokerCheck
(<https://brokercheck.finra.org/>).

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