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# Welcome to Wellspring Wealth

Distinctive Guidance for Significant Wealth

# **Experience the Difference**

"The only way to do great work is to love the work you do" - Steve Jobs

Privacy - Terms

# **Client Relationship**

Are you someone who likes being taken care of?



## **Philosophy of Service**

For over three decades, Wellspring Wealth has provided customized wealth strategies for successful families and business owners.



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### **Client Bill of Rights**

You are entitled to a high level of proactive, courteous service from all associates of our firm.



## **Built For Referrals**

Wellspring Wealth strongly believes that the greatest compliment a client can pay an advisor is to recommend their services to someone that they know and care about.



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## **Concierge Services**

Wellspring Wealth believes our clients deserve the best life has to offer. We are proud to offer a variety of concierge services to our clients.



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"The fruit of your work grows on other people's trees" - Peter Drucker

"Go confidently in the direction of your dreams. Live the life you have imagined."

# The Latest From Our Blog

Weekly Market Commentary – In the infamous words of Mortimer Snerd, "Who'd a thunk it?"

July 2nd, 2019 | Comments Off

The Markets In the infamous words of Mortimer Snerd, "Who'd a thunk it?" After U.S. stocks dropped sharply during the last weeks of December 2018, investors were not optimistic about the future. Early in [...]

Weekly Market Commentary – "Everything went up" and "A land without Time" June 24th, 2019 | Comments Off

The Markets Everything went up – and that's unusual. Randall Forsyth of Barron's explained, "Like our major political parties, the stock and bond markets seem to live in two different worlds these days. The [...]

# Weekly Market Commentary – Are we on the cusp of change?

June 17th, 2019 | Comments Off

The Markets Are we on the cusp of change? The United States is doing quite well. Randall Forsyth of Barron's reported: "...the U.S. economy and stock market both seem to be doing better than [...]

# Weekly Market Commentary – Surprise! It was a great week for markets.

June 10th, 2019 | Comments Off

The Markets Surprise! It was a great week for markets. Since the U.S.-China trade conflict resumed in early May, investors have been off balance. The possibility of escalating tariffs on Mexico heightened economic uncertainty. [...]

#### WELLSPRING WEALTH, LLC.

2200 Century Parkway, Suite 750 Atlanta, GA 30345 Phone: 404.634.1998 Email: info@wellspringwealth.com



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