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FIVE-STAR WEALTH MANAGER Featured in Atlanta Magazine for five years Ou

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OUR SERVICES

[Video] What We Do

[Video] Wealth Portal Intro

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Learn more about our 9-Part Protection Analysis!

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Popular Questions

Who Are We?

+ An Atlanta-based, privately-held, investment management firm.

+ Founded in 1996, we have years of custom design management experience.

+ A company firmly committed to independence, ethics, and unbiased consulting.

What Do We Believe In?

What Makes Us Different?

At Bill Spalding Wealth Management, we understand that excellent performance alone is not our only objective. Our goal is to provide outstanding service as well. So as hard as we work to provide value in the investment process, our team is equally focused on delivering superior and outstanding customer service at all times. Because of this commitment, our company was selected as a 5-time, Five Star Wealth Manager recipient, based on independent surveys and profiled in Atlanta Magazine.

Personal services provided include a weekly market commentary, a client pet club, a Wealth Portal for each client to track and monitor their net worth, and unlimited contact via phone, email, and personal reviews. We want each and every client to receive as much personal contact, assistance, and attention as they desire.

Through a team of professional alliances of individuals who specialize in specific areas, we coordinate the ability for you to receive assistance in the following areas: creating and updating your will, creating and delivering a personal financial plan, evaluating

your personal life and health insurance, and setting up a charitable giving account that provides immediate tax deductions with every deposit. This account can be invested and grow tax-free while inside the account.

BILL’S MARKET COMMENTARY

Our success is inextricably aligned to that of our clients. We create custom plans and focus on prompt service
experiences to ensure your peace of mind.

BillSpalding Market Commentary

On June 17, 2019

June 17, 2019

Weekly Market Commentary June 17, 2019 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 OK, thank you, as the expansion and bull market celebrate their 10th anniversaries. Unemployment […]

BillSpalding Market Commentary

On June 10, 2019

June 10, 2019

Weekly Market Commentary June 10, 2019 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. Then, last week’s unemployment report arrived with news that 75,000 jobs were created in […]
BillSpalding Market Commentary

On June 3, 2019

June 3, 2019

Weekly Market Commentary June 3, 2019 The Markets Tariff trouble. Just two weeks ago, the U.S. government lifted tariffs on Mexico and Canada. So, it was a surprise last week when President Trump tweeted the United States would impose an escalating tariff on all goods imported from Mexico until the flow of migrants to […]

More Market Commentary

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Investment Advisory Services offered through Bill Spalding Wealth Management, Inc. - Bill Spalding, Investment Advisor Representative

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