HOW WE HELP

Our mission is to work with you to identify a prudent path to your goals while providing financial planning and investment management solutions to reach those goals. We partner with you every step of the way as you work to achieve your financial goals.

Learn More

WHO WE ARE

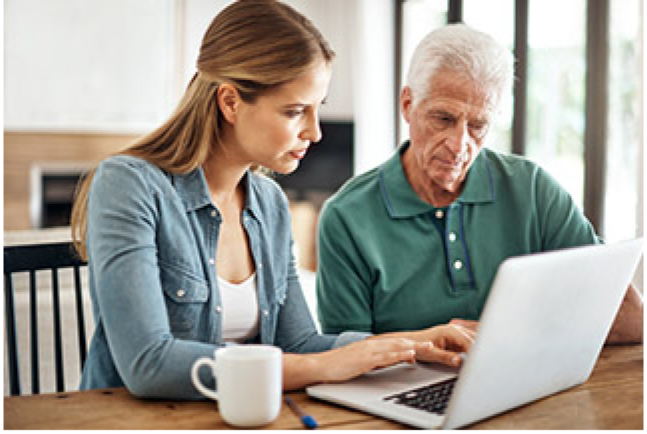
We are a Registered Investment Advisory firm and fee-only financial advisor. While we serve the greater Atlanta area from our office in Decatur, Georgia, we actually work with clients all over the United States. As your fiduciary, we are dedicated to putting your interest first—always.

Discover Our Difference

WHO WE WORK WITH

We help clients focus on what they can control and prepare for what they cannot, including retirement planning, retirement planning, wealth management, and investment management. We have special expertise working with:

People Near Retirement Age



People Who Have Received an Inheritance

Retirees

Federal Government Employees

Adult Children with Aging Parents

Emory Employees

Schedule a 30-Minute Call to Discuss Your Situation

GET STARTED

BLOG

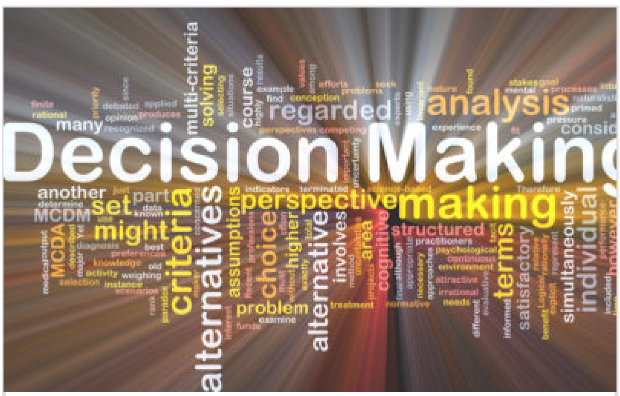
Our mission is to help you make informed decisions about your money. The ideas for our posts come from client questions as well as common financial situations and issues we have encountered over the years.

Don’t Buy Pork at a Nail Salon or a Brief Lesson in Knowing What You Need

Jun 14, 2019

Key Retirement Dates You Should know

May 31, 2019



Designing Your Retirement Paycheck and Decreasing Your Stress

May 17, 2019

ATLANTA

ST. SIMONS

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