About
Services
Philosophy
People
Resources
News
Careers
Contact

BETTER TOGETHER

[services]

BIG THINKING

[philosophy]

BUILDING TRUST

[our people]

WELCOME TO BT WEALTH MANAGEMENT!

BT Wealth Management is an independent, fee-only Registered Investment Advisor that provides investment management, consulting, and financial planning services to high-net-worth individuals and families. Founded in 2008, BT Wealth Management has grown to over $950 million assets under management (AUM) and seventeen employees as of March 31, 2019, with offices in Atlanta and Savannah. The BT Wealth Management team adheres to a disciplined investment process with a focus on building portfolios that meet client goals while remaining resilient in the face of market uncertainty.

Featured News

"BT Wealth Management Names Terri Munro Partner," Metro Atlanta CEO

In an article published on Feb. 8, 2019 by Metro Atlanta CEO, Terri Munro is featured for being named partner at BT Wealth Management. Her practice includes retirement, business succession, estate, and charitable planning for high net worth individuals and families. BT Wealth Management managing partner and chief investment officer Scott Craig says, "Terri's specialized […]

Read More

CONTACT US

WE'VE MOVED!

We've moved, and know that it can be tricky to get to our new building. When you turn from Riverwood Parkway, Riverwood 200 will be the 12 story building on your right. To park, turn right just before you get to Riverwood 200 and drive around the building where you will find Visitor Parking. To enter Riverwood 200, walk back around to the front and walk in the main entrance. Take the elevators to the 10th floor. We are Suite 1075. In the event of rain, drive to the bottom of the visitor parking area and use the call box to call security to enter the reserved parking area. Let them know you are a guest of BT Wealth Management. Park in any spot that is not reserved and enter the building using the parking deck elevators.

Riverwood 200
3300 Riverwood Parkway, Suite 1075
Atlanta, GA 30339
Phone 770.635.5000

At BT Wealth Management, providing investment management, consulting and financial planning services to clients is our passion. We seek to help high-net-worth individuals and families reach their financial goals by understanding each of our clients' objectives and risk tolerance and designing the investment strategies most appropriate for their individual situation.

Our professionals are experienced, qualified, and have earned professional designations including: Chartered Financial Analyst (CFA), CERTIFIED FINANCIAL PLANNER™ (CFP®), Certified Public Accountant (CPA), and Certified Investment Management Analyst® (CIMA). Our long term relationships with our clients are the foundation of our business and are the result of our commitment to superior client service.