Wealth Managers and Advisors for High-Net Worth Clients

Patton Albertson & Miller is an independent, fee only, financial life management firm serving affluent individuals and families throughout the United States. We provide solutions to just about any financial management issue you may face, from managing daily finances and investments to a broad range of long-term planning strategies for you and your family. We provide these solutions by collaborating with other members of your professional team – resulting in a plan that is well-thought-out, customized, and comprehensive. Whether you simply need investment guidance or want a quarterback to steer a team of financial and legal advisors toward common goals, we're here to help you with our comprehensive roster of financial services.

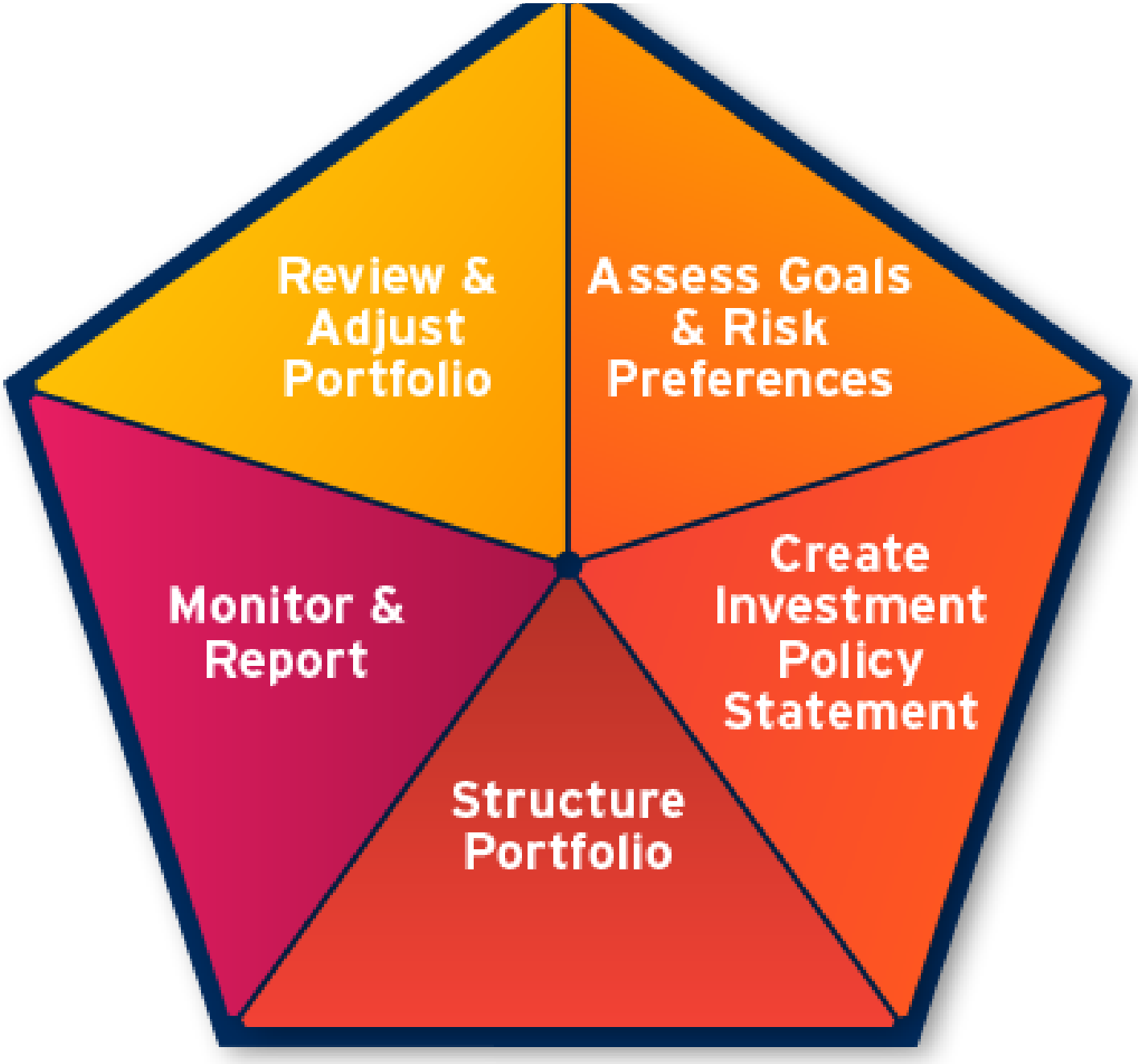
With offices in Georgia and Tennessee, Patton Albertson & Miller serves clients throughout the U.S. No matter where you live, we're available to serve your wealth management needs. Call us today at **866-606-5554** to learn more.

Free Portfolio Risk Analysis

Investment Management

Our investment management approach recognizes that each client has different circumstances, different goals, and different attitudes about risk and return. Our job is to understand your uniqueness and use that understanding to craft an investment strategy that suits you.

Plan Your Strategy Today


Review & Adjust Portfolio
Assess Goals & Risk Preferences
Create Investment Policy Statement
Structure Portfolio
Monitor & Report

Estate Planning

One of the greatest joys in life is knowing we have provided for those we love and leaving a financial legacy that reflects our values. We provide a wide range of estate planning strategies to help you protect your estate, minimize taxes, and leave a meaningful legacy for the people and causes that you care about.

Start Planning Today

Business Succession Planning

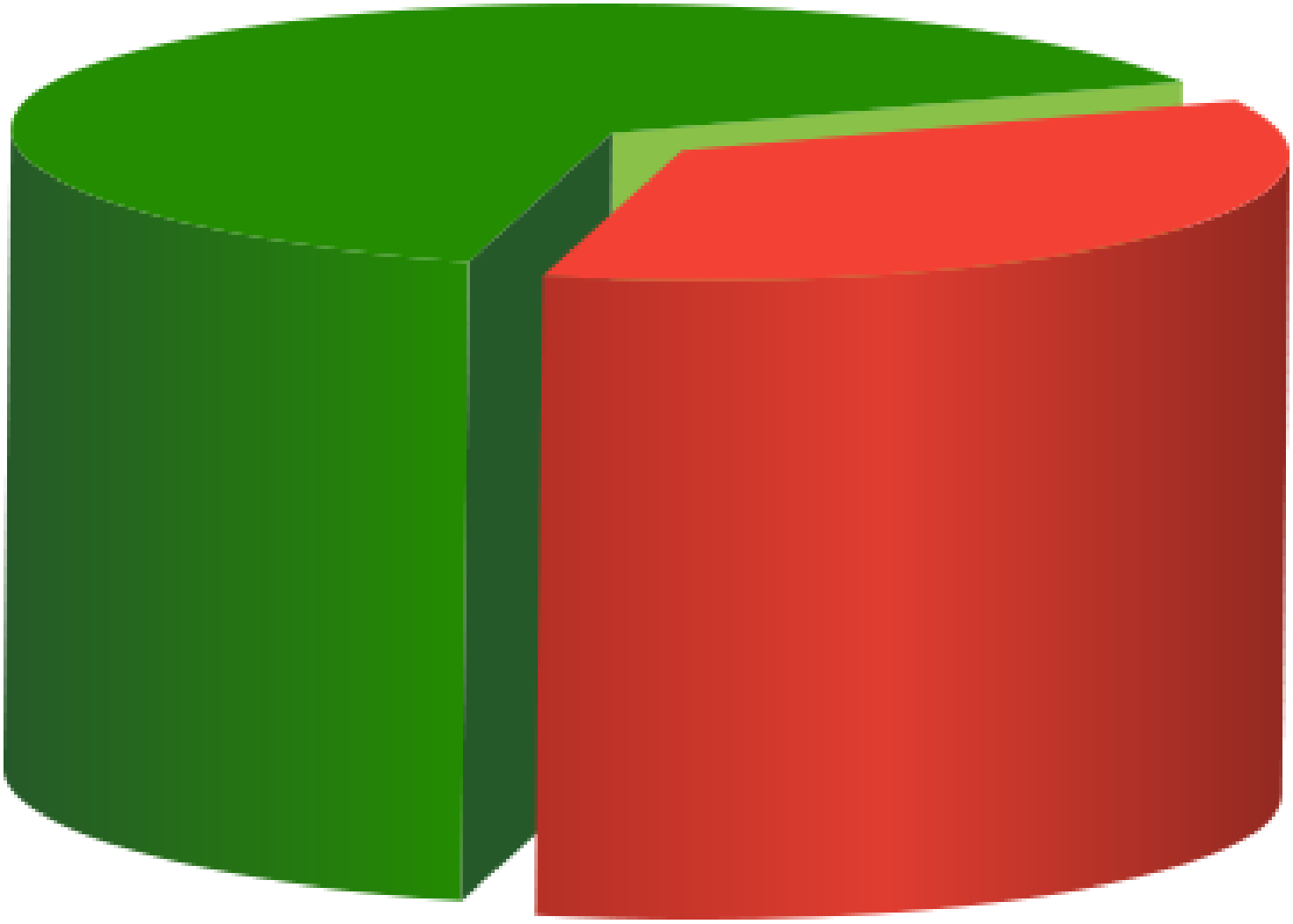
Perhaps the most difficult part of owning a business is developing an exit strategy that rewards you for years of hard work and risk, but also takes care of those who helped you along the way. People like partners, employees, vendors, and clients. A well-thought-out business succession plan can help make your exit from the business an "everyone wins" event.

Start Preparing for Tomorrow, Today

Tax Planning

Keeping more of your wealth is the key objective of our tax planning services. Whether you need strategies for minimizing capital gains or income taxes, or want to protect more of your wealth from gift or estate taxes, we can design strategies to help you achieve your goals.

Keep More of What You've Earned



Trust & Fiduciary Services

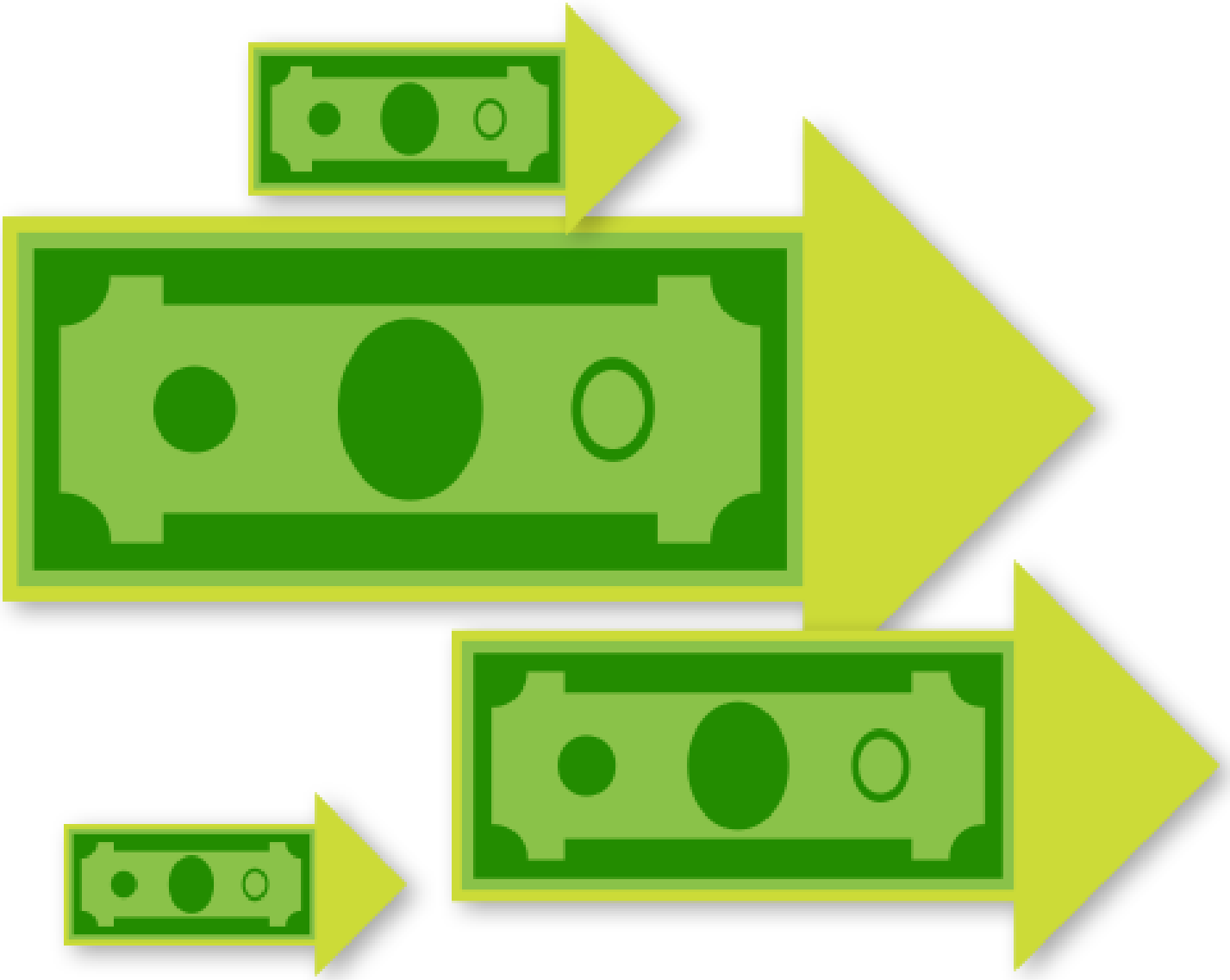
Not only do we help you design your estate planning strategy, we can also help you implement that strategy by serving in a variety of roles, such as trustee (see Strategic Partnerships), executor, or personal representative. As with everything we do, we begin by understanding your unique circumstances and crafting solutions to meet your goals.

Secure Your Future Today

Risk Management

Risk comes in many forms. Our risk management services are designed to help you identify all the financial risks in life and make a conscious decision to assume that risk, eliminate it, or pay someone to assume it on your behalf. Understanding each client's circumstances is the first step toward an effective risk management plan.

Protect Your Wealth Today



Cash Flow Management

The daily financial chore of managing your personal finances can be a drudgery that keeps you from the more rewarding endeavors of life. We can help you with comprehensive cash flow management services that protect your financial well-being without taking away your control. Think of us as your personal CFO.

Take Control Today

RETIREMENT PLANNING

Retirement planning centers around one key question. How much money do you need to live the retirement you desire? Our retirement planning process is designed to answer this difficult question. Whether you are planning to retire in twenty-five years, ten years, one year, or you are already retired, our retirement planning services replace worry with facts. Our experienced advisors will help you assess your situation and recommend the appropriate steps that will help you achieve your retirement goals.

Increase the Value of Your Company

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* indicates required

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Last Name *

Email Address *

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For a thorough look at financial and economic trends, read this quarter's in-depth newsletter

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