


Wealth Management Built For You

Helping Families Protect, Grow, and Manage Their
Wealth Since 1989

CONTACT US

Fiduciary, Comprehensive, and Personal Wealth
Management

 Call 404-264-1400



FIDUCIARY

"I want an advisor who is acting in my best interest at all times, period."

We founded our firm in 1989 based on this core fiduciary value.

EXPERTISE

"I want real knowledge on my financial team, not salespeople pretending to be advisors."

Over 90% of our client service professionals hold or are seeking the CFP® and/or CFA designations.

ALTERNATIVES

"I want more than just plain vanilla stocks and bonds in a portfolio personalized for me."

Our investment experts source and analyze unique private alternative investments to target improved long term performance in combination

COMPREHENSIVE

"I want someone to help handle everything in my financial life, saving me time and money."

We serve as your family CFO, handling your investments and planning issues big and small.

TECHNOLOGY

"I want the latest technology to make my life easier."

We have invested in industry-leading financial planning and investment reporting software to make meetings simpler and give you easy online 24/7 access.

PERSONAL

"I want real people advising me now and in the future to help me stay on track."

We believe in high touch service and personal relationships. We serve you with a team of people who are committed to working with you for the long term.

Who We Are



**Founded in
1989**

One of the first
fee-only firms
in the U.S.



**True
Fiduciaries**

The foundation
of our firm that
will never
change



**100%
Employee
Owned**

Committed to
staying
independent



**Clients in 45
States**

Based in
Atlanta and
serving clients
across the U.S.



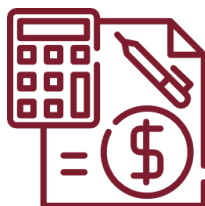
98%
Client retention
rate

Our Services

**Service Levels
and Costs**



**Financial
Planning**



**Investment
Management**



Foundations and Nonprofits



Learn more about how HB provides fiduciary investment management to tax-exempt organizations.

Family Office

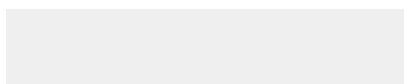


Learn more about how the HB Family Office division specializes in serving your unique ultra high net worth family's needs.



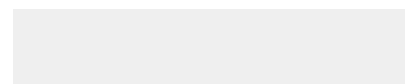
Top 100 Independent Wealth Advisors

2009 - 2018



300 Top U.S. Registered Investment Advisors

2014 - 2019



Top 50 Registered Investment Advisors

2010 - 2018



Top 50 Largest Fee-Only RIAs

2013-2019

Top 250 Wealth Advisors Award

2018



Charles Schwab Best in Business IMPACT™
Award

2013

Learn More About How HB Can Help You

Contact Us

© Copyright - Homrich Berg