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

The HB Difference

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.

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.

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.

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.

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

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

Call 404-264-1400

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how HB helps you protect, grow, and manage your wealth so you can relax and enjoy life.

the personalized HB approach to investing.

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 250 Wealth Advisors Award

2018

Top 50 Largest Fee-Only RIAs

2013-2019

Charles Schwab Best in Business IMPACT™ Award

2013

Learn More About How HB Can Help You

Contact Us

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