Building and maintaining wealth for our clients since 1988.

OUR PROMISE TO YOU

Transparency

Informed clients make better decisions. We think clients deserve to know exactly what they're paying for investment services—and we make that easy with a simple fee-only arrangement.

Transparency is also one reason we manage money in-house—so we can tell our clients what they own and why.

Expert advice

Clients deserve the best advice we can provide. That's why all of our principals have earned the Certified Financial Planner® designation.

Beyond the CFP® designations, the JPW team holds multiple CPA licenses including graduate degrees in Accounting and Business.

Continuity

Life has more than enough change. Our clients know they will work with the same team for years to come, and get the same careful investment approach, individual attention, and high level of service.

THE JPW TEAM

Peyton Jamison

CFP®

Investment experience: 13 years
With JPW: 11 years

A portfolio manager and client relationship manager at JPW, Peyton's goal since middle school was to work in money management with his father . . .

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Bobby Jamison

CPA & CFP®, *Founder & President*

Investment experience: 39 years
With JPW: 30 years

Bobby leads JPW's practice, with an extensive background in taxation and accounting that gives him a unique approach to investments from . . .

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Joey Spain

CPA & CFP®

Investment experience: 15 years
With JPW: 15 years

Joey performs portfolio analysis and tax planning for individual and business clients. He has a long family association with the Jamisons . . .

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Jill Connor

Investment experience: 2 years
With JPW: 1 year

Jill joined JPW in 2017 and manages operations and enhances client experiences...

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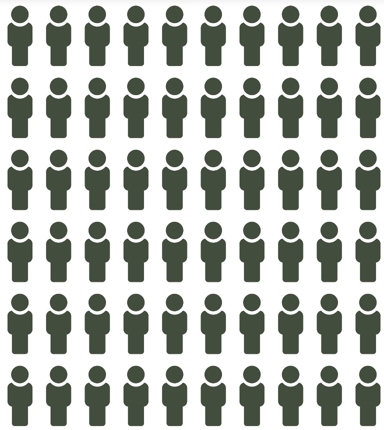
We're aligned with our clients.

~ 250,000
U.S. financial advisors

30% have the Certified Financial Planning® designation

19% are independent AND fee-only



JAMISON
PRIVATE WEALTH MANAGEMENT

- clients first
- expert
- transparent

Sources: U.S. Bureau of Labor Statistics; Certified Financial Planner Board of Standards, Inc; Cerulli Associates

Your Unique Needs

Every client is different. From investment needs, tax treatment, and funding and income needs to legacy and estate planning, each client's situation demands a completely custom, attentive approach to planning and investing.

Our Value

We listen.
We invest in-house.
We think long-term.

customize their portfolio and their plan.

Is it time you worked with a wealth advisor who puts you first?

LEARN MORE

Jamison Private Wealth Management
12630 Crabapple Road
Suite 300
Milton, GA 30004

(678) 323-3454