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The List

Atlanta's Top 25 Financial Planning and Advisory Firms Ranked by Total assets under management for Atlanta office

Locally Researched by: Patsy Conn, Atlanta Business Chronicle

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Staff Atlanta Business Chronicle

Rank	Firm	Total assets under management for Atlanta office	Of total assets for Atlanta, amount discretionary	Of total assets for Atlanta, amount nondiscretionary	Total assets managed companywide	Number of professionals in Atlanta	Chief Atlanta officer(s)
1	Merrill Lynch 3455 Peachtree Rd. N.E. #1000 Atlanta, GA 30326 404-231-2400 ml.com	96857658901	26788225516	70069436385	1900000000000	265	Eric Schimpf
2	Investment Research & Advisory Group Inc. 1180 W. Peachtree St. #2475 Atlanta, GA 30309 404-760-3730 iragroup.com	64360000000	175000000	6261000000	6436063857	6.0	Doug Leeson
3	Morgan Stanley Wealth Management 3280 Peachtree Rd. #1700 Atlanta, GA 30305 404-266-6800 morganstanley.com	38579734608	NA	NA	2000000000000	313	Tim Byrnes
4	SunTrust Banks Inc. 303 Peachtree St. N.E. Atlanta, GA 30308 866-495-5416 suntrust.com	28914986000	15345483000	13569503000	107204337000	142	Joseph Thompson
5	Reliance Trust Co. an FIS Co. 1100 Abernathy Rd. #400 Atlanta, GA 30328 800-749-0752 reliance-trust.com	15658602988	15658602988	0.0	15658602988	5.0	Kevin Crawford
6	J.P. Morgan 3424 Peachtree Rd. N.E. Atlanta, GA 30326 404-842-4000 jpmorgan.com	150000000000	NA	NA	1058000000000	NA	Pete Secret Mike Marino
7	Raymond James Financial Inc. 3050 Peachtree Rd. N.W. #600 Atlanta, GA 30305 404-240-6700 raymondjames.com	10394549951	NA	NA	409188429697	0.0	James Hamilton Michael Hines
	CAPTRUST						

8	3348 Peachtree Rd. N.E. #1420 Atlanta, GA 30326 404-201-6472 captrustadvisors.com	7314540784	18397104	7296143680	189873194016	3.0	Vic Bell Rick Bernhardt Drew McCorkle
9	Homrich Berg 3060 Peachtree Rd. #830 Atlanta, GA 30305 404-264-1400 homrichberg.com	4230000000	3864000000	366000000	4230000000	47	Andrew Berg
10	BNY Mellon Wealth Management 3290 Northside Pkwy. N.W. #950 Atlanta, GA 30327 678-538-2000 bnymellonwealthmanagement.com	3750000000	3750000000	NA	197000000000	31	Christopher Hohlstein
11	Iron Capital Advisors Inc. 3355 Lenox Rd. #925 Atlanta, GA 30326 800-417-3804 ironcapitaladvisors.com	3624663288	1281641454	2343021834	3624663288	3.0	Charles Osborne
12	National Financial Services Group 1050 Crown Pointe Pkwy. #1700 Atlanta, GA 30338 770-512-5100 nationalfinancialservicesgroup.com	2987000000	0.0	2987000000	3717000000	112	James Cook
13	Atlantic Trust 3290 Northside Pkwy. 7th Fl. Atlanta, GA 30309 404-881-3400 atlantictrust.com	2941100000	2705640000	235430000	27800000000	9.0	Jack Markwalter Barry Berlin W. Scott Thompson III Charles Hoke
14	Integrated Financial Group Inc. 200 Ashford Center N. #400 Atlanta, GA 30338 770-353-6400 integrated-financial-group.com	2355473992	2355473992	900254000	3729606114	42	Donald Patrick
15	SignatureFD LLC 1230 Peachtree St. #1800 Atlanta, GA 30309 404-253-7600 signaturefd.com	2325695000	1959764000	365931000	2325695000	25	Jeffrey Peller
16	Edge Advisors LLC 1380 W. Paces Ferry Rd. #1000 Atlanta, GA 30327 404-890-7707 edgcapartners.com	2300000000	1596000000	704000000	2300000000	21	Harry Jones
16	Capstone Financial 3333 Peachtree Rd. N.E. #400 Atlanta, GA 30326 404-261-8900 capstonefinancialga.com	2300000000	NA	2300000000	2300000000	81	Chuck McCray
	Peachtree Planning						

18	5040 Roswell Rd. Atlanta, GA 30342 404-260-1600 peachtreeplanning.com Pathstone Family Office LLC, dba Pathstone Federal Street 3333 Piedmont Rd. N.E. #2000	2053794680	NA	376216904	2053794680	108	Darrell "Corky" Dawes
19	Atlanta, GA 30305 404-592-0180 pathstone.com Capital Directions LLC 400 Northridge Rd. #220	1811332264	1232365007	578967257	5506268123	9.0	Allan Zachariah
20	Atlanta, GA 30350 404-237-8881 capdir.com Northwestern Mutual 3438 Peachtree Rd. #1200	1794193858	1251817590	542376268	1794193858	5.0	Dennis Covington Terry Hartigan
21	Atlanta, GA 30326 404-846-3000 buckhead.nm.com Balentine 3344 Peachtree Rd. #2200	1605616867	1605616867	0.0	46984900000	95	John Wright II
22	Atlanta, GA 30326 404-537-4800 balentine.com Capital Investment Advisors 200 Sandy Springs Pl. #300	1595000000	1386300000	209000000	1595000000	19	Robert Balentine
23	Atlanta, GA 30328 404-531-0018 yourwealth.com Henssler Financial 3735 Cherokee St. Kennesaw, GA 30144 770-429-9166 henssler.com	1555007116	1542852699	12154417	1555007116	13	Michael Reiner Wesley Moss Mitchell Reiner Matt Reiner
24	Atlanta, GA 30303 404-522-5774 montagwealthmanagement.com Montag 133 Peachtree St. #2500	1501578609	1296323304	205255305	1501578609	3.0	Edward "Ned" Montag