

ATLANTA'S TOP 10 NAPFA FEE-ONLY INVESTMENT ADVISERS

Ranked by assets under management

Rank	Company name	Total assets under management for Atlanta office*	Of total assets, amount discretionary* / non-discretionary*	Number of professionals** / Total staff	Number of fee-paying clients in metro Atlanta / Companywide	Agencies that regulate the firm†	Chief Atlanta officer(s)	Year est. in Atlanta
1.	Iron Capital Advisors Inc. 3355 Lenox Road, Suite 925 Atlanta, Ga. 30326 (404) 564-9850 www.ironcapitaladvisors.com	\$2,077,982,904	\$16,864,000 \$2,061,118,904	2 6	NA 82	SEC	Charles Osborne	2003
2.	Homrich Berg 3060 Peachtree Road N.W., Suite 830 Atlanta, Ga. 30305 (404) 264-1400 www.homrichberg.com	\$1,851,000,000	\$1,764,000,000 \$87,000,000	23 51	388 690	SEC	Andrew J. Berg	1989
3.	Ronald Blue & Co. 300 Colonial Center Parkway, Suite 300 Atlanta, Ga. 30076 (770) 280-6000 www.ronblue.com	\$681,384,000	\$664,958,000 \$16,426,000	85 116	1,300 3,700	SEC	Russ Crosson	1979
4.	Brightworth LLC 3280 Peachtree Road N.E., Suite 2075 Atlanta, Ga. 30305 (770) 368-1700 www.brightworth.com	\$584,264,000	\$584,264,000 \$0	10 21	216 339	SEC	Chris Dardaman, Alan Gotthardt, Ray Padrón, Dave Polstra	1997
5.	Capital Investment Advisors Inc. 200 Sandy Springs Place, Suite 300 Atlanta, Ga. 30328 (404) 531-0018 www.yourwealth.com	\$574,000,000	\$539,000,000 \$35,000,000	5 13	1,300 1,300	SEC	Michael Reiner, Wes Moss, Mitchell Reiner, Woody Alpern	1996
6.	Windham Brannon Financial Group Inc. 1355 Peachtree St. N.E., Suite 200 Atlanta, Ga. 30309 (404) 898-2000 www.wbfinancial.com	\$306,898,917	\$306,898,917 \$0	5 8	112 149	SEC	Jim Heard	1999
7.	Resource Planning Group Ltd. 7000 Peachtree-Dunwoody Road, Building 6, Suite 100 Atlanta, Ga. 30328 (770) 671-9500 www.rpgplanner.com	\$306,795,000	\$298,270,000 \$8,525,000	4 7	219 277	SEC	John E. Howard, Kevin R. Woods, Eric B. Toole	1991
8.	Lesesne Capital Management Inc. 3414 Peachtree Road N.E., Suite 750 Atlanta, Ga. 30326 (404) 231-3414 www.lesesnecapital.com	\$202,000,000	\$202,000,000 \$0	3 5	176 209	SEC	Warren W. Wick II, William J. Cohen, Brannon B. Lesesne Jr.	1974
9.	Cambridge Southern Financial Advisors 115 Perimeter Center Place N.E., Suite 1060 Atlanta, Ga. 30346 (770) 506-7377 www.cambridgesouthern.com	\$171,279,000	\$0 \$171,279,000	2 5	112 132	FINRA, state registered in Georgia, Utah, Oregon, Texas	Robert S. Hockett	1996
10.	Sanders Financial Management Inc. 5550 Triangle Parkway, Suite 300 Norcross, Ga. 30092 (770) 448-5111 www.sandersfinancial.com	\$145,123,871	\$140,619,924 \$4,503,947	5 11	120 174	SEC	Emily C. Sanders, Owen H. Malcolm	1994

* Firms reported assets under management, discretionary and non-discretionary, using figures from SEC Form ADV Part I, Item 5F (2) (a), (b) and (c). List only includes fee-only National Association of Personal Financial Advisors (NAPFA) member firms. All information is current as of June 30, 2009.

** A professional is defined here as a person with a professional designation, such as a CPA or CFP who is qualified to provide comprehensive financial planning services.

† SEC - Securities and Exchange Commission
FINRA - Financial Industry Regulatory Authority

SOURCES: National Association of Personal Financial Advisors (NAPFA), Atlanta Business Chronicle research and the firms

It is not the intent of this list to endorse the participants or to imply that the listing of a firm indicates its quality. Although every attempt is made to ensure the accuracy and thoroughness of Atlanta Business Chronicle charts, omissions sometimes occur. All information listed is based on responses from the firms to Atlanta Business Chronicle surveys. Please send corrections or additions on company letterhead to Patsy Conn, Research Director, Atlanta Business Chronicle, 3423 Piedmont Road, Suite 400, Atlanta, Ga. 30305, or e-mail pconn@bizjournals.com.