



WARREN AVERETT ASSET MANAGEMENT FAST FACTS

YEAR FOUNDED

1999

ADVISE ON ASSETS IN EXCESS OF

\$2.5 Billion

SIZE OF FIRM

50+ Team Members

DESIGNATIONS INCLUDING

15 > CFP > CIMA > JD
> CPA > CRPC > CAIA
> AIF > AAMS > QPFC
> AEP > AWMA > CIPM
> CFA > HDP > MBA

SERVICE LINES

4 > Private Clients
> Family Office
> Corporate Retirement Plans
> Institutional Consulting

OFFICE LOCATIONS

7 > Atlanta, GA
> Birmingham, AL
> Homewood, AL
> Huntsville, AL
> Montgomery, AL
> Pensacola, FL
> Tampa, FL



RANKED*

Top 300 Among independent RIAs from across the U.S. by *Financial Times*

Number 15 CPA Financial Planner in the U.S. by *Accounting Today*

Top 10 Financial Planning and Investment Advisory Firm in Alabama by *Birmingham Business Journal*



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