Warren Averett
ASSET MANAGEMENT

INTEGRITY
IN ALL WE DO

DREW GEARHART, CFP®

Senior Client Consultant

D 205.314.6207 | F 205.879.1114
600 University Park Place, Suite 501 | Birmingham, AL 35209
Drew.Gearhart@WAasset.com

As a Senior Client Consultant, Drew loves being his clients' go-to source for guidance in financial matters as it gives him an amazing sense of professional purpose. He believes making a positive difference in someone's life is hard to beat; that's partly why he was drawn to financial planning. He enjoys helping clients define their goals and develop a plan to take care of their families now and in the future.

Drew has always enjoyed solving puzzles and problems – give him a set of facts (or let him uncover them) and a set of goals, and he's happy. For Drew, one of the best parts of the day is meeting with clients and learning about their hobbies and interests and discovering how comprehensive planning can help enhance, but also simplify, the lives of his clients and their families. Drew and his wife reside in Mountain Brook with their two daughters.

Professional Affiliations

- Estate Planning Council of Birmingham, Member
- National Association of Personal Financial Advisors, Registered Advisor

Community Involvement

- B Charitable, Board of Directors
- Children's Hospital, Committee for the Future
- The Exceptional Foundation, Board of Directors
- The Club, Young Executive Committee

Honors, Awards and Recognition

- Million Dollar Round Table, 2014

Ask Me About

- Whether your insurance coverage is actually appropriate for you, or is that just what you were sold
- Whether your estate plan is talking properly to the rest of your financial plan
- Ways to effectively pass money to future generations and helping your children and grandchildren appreciate your hard work and gifts
- My path to becoming a third-generation Eagle Scout
- How to purchase rental properties with your in-laws
- My transition from the insurance industry to the comprehensive financial planning world

Designations and Certifications

Certified Financial Planner™

Areas of Special Emphasis

Private Client Services, Family Office Services

Education

Bachelor of Science, Banking and Financial Services
University of Alabama, Tuscaloosa, AL