



# WARREN AVERETT ASSET MANAGEMENT FAST FACTS

YEAR FOUNDED

**1999**

ADVISE ON ASSETS IN EXCESS OF

**\$4** Billion

SIZE OF FIRM

**50+** Team Members

DESIGNATIONS INCLUDING

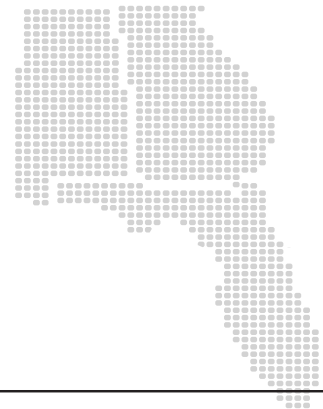
**15** > CFP > CIMA > JD  
> CPA > CRPC > CAIA  
> AIF > AAMS > QPFC  
> AEP > AWMA > CIPM  
> CFA > HDP > MBA

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*

**Warren Averett**  
ASSET MANAGEMENT

[www.WAasset.com](http://www.WAasset.com) | 800.759.7857

\*Rankings and/or recognition by unaffiliated rating services and/or publications should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if Warren Averett Asset Management is engaged, or continues to be engaged, to provide investment advisory services, nor should it be construed as a current or past endorsement of Warren Averett Asset Management by any of its clients. Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser.