PRIVATE CLIENT SERVICES

PERSONAL WEALTH MANAGEMENT TO HELP YOU THRIVE

Wealth management is more than just managing your investment portfolio. It's an alignment of personal, emotional and financial decisions that allows you to take care of the important things in life. Warren Averett Asset Management's comprehensive approach for private clients blends investment management, tax, estate and financial planning services. And yes, we do love it when your plans are realized.

OUR VALUE

Everything we do is personal and fashioned to create present and future value. With us by your side, expect:

- Collaborative investment, tax, estate and financial planning services
- Intimate knowledge of your personal and financial objectives
- A team of fee-only advisors dedicated to you and your family
- Regular meetings to foster communication and enhance satisfaction
- An in-house investment committee directing all investment research and decisions

All designed and delivered to help you and yours thrive.

Please Note: The scope of the services to be provided depends upon the needs of the client and the terms of the engagement.

OUR PORTFOLIOS

Our portfolios are made up of traditional asset classes (equity and fixed income), as well as nontraditional alternatives. We customize a plan specifically for you. In addition to highly accessible, partner-level attention, a customized Wealth Management dashboard is created and shared with you. Quarterly performance reporting shows your portfolio returns net of all fees and is compared to a relevant benchmark.

Advise on Assets in Excess of

$2.5 BILLION

OUR TEAM

Access a talented mix of fee-only advisors with credentials including CFA, CFP®, CPA, JD, CIMA, AEP and AIF. Since we're not tied to a group of funds or managers, you get solutions that are specific to you.

Warren Averett
ASSET MANAGEMENT

Learn more at www.WAasset.com

Tap into years of financial services experience, where the only agenda is yours. Independence matters; we'd love to show you how.

ABOUT WARREN AVERETT ASSET MANAGEMENT

Warren Averett Asset Management is a Registered Investment Advisory (RIA) firm that advises on assets in excess of $2.5 billion. We strive to provide proactive, personal service by listening and fully comprehending your financial goals. We are different from many other asset management firms in that we are a fee-only firm, so our advice is independent and not based on selling any products, but rather, helping our clients achieve their financial goals.

"I strive to treat my clients' goals with the same urgency that I would treat my own. Having clients know that I'm always looking out for them and working on their behalf is of the utmost importance."

— Joseph R. McNair, CFP®, JD, CPA
Member, Senior Client Consultant
Warren Averett Asset Management

EXPERIENCE A DIFFERENCE THAT WORKS TO YOUR ADVANTAGE

Count on: independence, we operate free from quotas, fund restrictions and proprietary products; discipline, a data-and-detail driven approach with in-depth research and reliable follow through; and a better return on relationships, advisors passionately committed to seeing you and your family flourish.

RESOURCES TO HELP YOU AND YOURS THRIVE

Warren Averett Asset Management offers a variety of services to fit your personal goals including:

- Comprehensive financial planning
- Retirement planning
- Investment management
- Life, disability and long term care insurance analysis
- College education planning
- Portfolio performance evaluation
- Collaborative tax and estate planning

We also provide services to assist business owners with business financial matters including:

- Tax consulting
- Buy/sell agreements
- Partnership agreement review
- Business transition planning

To find out how we can help, meet our Private Client Services team at www.WAasset.com or contact us in:

Atlanta, GA - 770.396.1100
Birmingham, AL - 205.979.4100
Homewood, AL - 205.871.3334
Huntsville, AL - 256.533.7610
Montgomery, AL - 334.271.2200
Pensacola, FL - 850.435.7400
Tampa, FL - 813.229.2321

Warren Averett
ASSET MANAGEMENT

Learn more at www.WAasset.com