



# WARREN AVERETT ASSET MANAGEMENT FAST FACTS

YEAR FOUNDED

**1999**

ADVISE ON ASSETS IN EXCESS OF

**\$2.4** 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*

**Number 6** Financial Planning and Investment Advisory Firm in Alabama by *the Birmingham Business Journal*

**Warren Averett**  
ASSET MANAGEMENT

www.WAasset.com | 800.759.7857

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