

# Balentine's YEAR IN REVIEW 2024



In 2024, we celebrated our 15<sup>th</sup> anniversary, reflecting on a journey that began in 2009 when our founders Robert Balentine, Adrian Cronje, Brittain Prigge, and David Damiani launched Balentine LLC. They set out to build a firm rooted in values where employees and clients could thrive. Above all, they sought to manage wealth how they would want someone to manage their own. **We honor this milestone as a testament to our collaborative culture, commitment to helping clients achieve financial security and growth, and entrepreneurial vision.** In recent years, we've memorialized these qualities in our 30 Fundamentals – behaviors that exemplify how we strive to treat clients and each other.

As we reflect on the past year, seven of our fundamentals shine through:



## Have a Growth Mindset

*Find a new and better way.  
See a world with no limits.*

### A Generational Investment to Propel our Firm

Our firm secured a long-term financial partner, **FJ Management**. This partnership will fuel our growth as a leading independent wealth manager well into the future, and that will only strengthen our ability to help our clients and their families build what comes next.



### Three New Principals

Three Balentinians were **promoted to Principal**, joining a select group of leaders with a platform to grow their careers and give them a forum to provide new perspectives to the current leadership.



**Liz**  
Principal & Head of Marketing

**Mallorie**  
Principal & Director  
Accounting and Finance

**Matt**  
Principal & Senior  
Relationship Manager



## Relentlessly Improve

*Regularly consider ways to improve. Share what you learn so that others can benefit from best practices as well.*

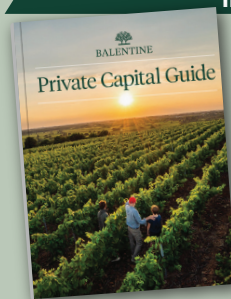
### In Operations

We evolved existing technologies and adopted new ones to increase productivity.



### In Private Capital

We assessed multiple direct deals on behalf of clients, and we added to our private capital offering.



### In Business Advisory



We cemented a framework for approaching business advisory conversations, partnering with **Joe Fahey** to provide guidance and expertise.

### In Family & Legacy

We hosted small-group lunches for client families to share experiences and partnered with **Mitchell Spearman** to train Relationship Managers in facilitating these conversations.



## Be a Brand Ambassador

*Consider how your actions affect our collective reputation and be a proud ambassador for the firm.*

### 12 New Teammates



### 16 Promotions



## Demonstrate a Passion for Excellence

*Take pride in the quality of everything you touch and everything you do.*



Balentine is one of the Best Places to work in Money Management for the 10<sup>th</sup> year in a row.



Adrian was recognized as one of Barron's Top 100 Independent Advisors.



## Give Back, Pay it Forward

*Be a servant leader – pay it forward and help others.*



Adrian assumed the Presidency of the Rotary Club of Atlanta.



We established the Balentine Foundation.



Our team shared insights in Inc., Entrepreneur, Forbes and FastCompany.



## Invest in Relationships

*Strong relationships enable us to work through difficult issues and challenging times more successfully.*

### With Our Clients



We are grateful to our clients, who ranked us as **"World Class Service Providers"** for the second year in a row, placing us in the top tier of the Net Promoter Score methodology.

We are proud to have a 99% client retention rate.



### With Our Team

*This year, we celebrated special moments like engagements, weddings, and new babies.*



## Keep Things Fun

*While our passion for excellence is real, we seek to keep perspective and laugh every day.*



Team-building activities included Balentine Boos, outings to the Braves and the Bulls, and more!

