

Balentine's

YEAR IN REVIEW 2024

Fifteen years after the launch of Balentine LLC, 2024 was a milestone year for our firm. We strengthened the support we provide to clients and announced an exciting partnership that will help secure our legacy for generations to come. These accomplishments were driven by the dedication of our team and a shared focus on using technology thoughtfully and staying true to our purpose. By embracing growth and innovation, we've built a stronger foundation to serve our clients while maintaining the personalized experience they value.



As we reflect on the past year, seven of our Balentine 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.

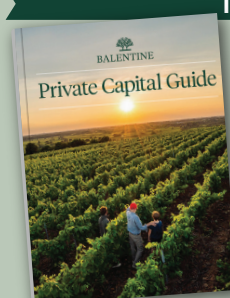
In Operations

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

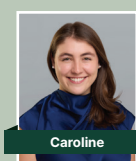
We hosted small-group lunches for client families to share experiences and partnered with **Mitchell Spearman** to train Relationship Managers in facilitating these conversations.



Be a Brand Ambassador

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

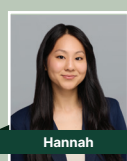
12 New Teammates



Caroline



Dayna



Hannah



Jennifer



Jon



Lauren



Logan



Manuela



Michael



Olivia



Sophie

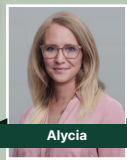


Tywanda

17 Promotions



John
Head of Financial
Planning & Raleigh Office



Alycia



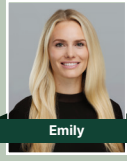
Andrea



Danielle



Dre



Emily



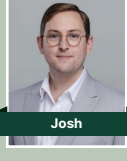
Jen



Jennifer



Josh



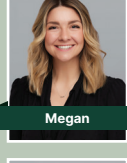
Josh



Kaitlyn



Mary



Megan



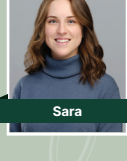
Meredith



Raj



Reid



Sara



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 10th 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!

