

# Balentine's Year in Review 2023

Robert and his father founded Balentine & Company nearly four decades ago, and next year will mark 15 years since Balentine LLC's establishment as an independent firm. We **attribute** some of this **success to our culture, intentionally grounded in mutual respect, entrepreneurial spirit, excellence, and integrity.** 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, six of our fundamentals shine through:

*"Legacy, what is a legacy?"*

*A legacy is planting seeds in a garden you will never get to see."*

Lin-Manuel Miranda  
Hamilton

**Have a Growth Mindset; Be a Lifelong Learner; Invest in Relationships; Demonstrate a Passion for Excellence; Give Back, Pay it Forward; and Keep Things Fun.**

## Have a Growth Mindset

What got us here is not the same as what will get us to the next level. **Get outside of your comfort zone** rather than stubbornly hanging on to the old way of doing things. Find a new and better way.

*See a world with no limits.*

## New Teammates



**Megan Cordell**  
Administrative Associate,  
Atlanta Wealth



**Jenn Cunningham**  
Executive Assistant  
to the Chairman and CEO



**Rebecca Evans**  
Relationship Associate,  
Atlanta Wealth



**Matthew Gilbert**  
Associate,  
Investment Strategy Team



**Juwon Hill**  
Portfolio Analyst,  
Atlanta Wealth



**Kacy Howard**  
Manager,  
Multi-Family Office



**Katie Kellogg**  
Human Resources  
Generalist



**Raj Kheraj**  
Associate,  
Multi-Family Office



**Danielle Maurice**  
Administrative Associate,  
Raleigh



**Sovannary Peou**  
Executive Assistant,  
Investment Strategy Team

We welcomed ten new teammates to the firm and celebrated four promotions.

## Promotions



**Sara Rydman Baker**  
Client Operations  
Associate



**Mary McDevitt**  
Senior Relationship Associate,  
Team Lead



**Andrea Walker**  
Client Service Manager



**Savanna Westmoreland**  
Relationship Associate

We moved into a gorgeous new office space.

AUA\*  
**\$7.5B**

Firmwide, we grew our AUA to nearly \$7.5 billion.

## Be a Lifelong Learner

Seek out and take advantage of every opportunity to **gain more knowledge, to increase your skills, and to become a greater expert.** Be resourceful about learning and sharing best practices.

Over half of our firm attended conferences and spoke at industry conferences and participated in peer learning organizations.



**Christina Callesis and Alexa Svensson** attended Dreamforce in San Francisco.



**Ben Webb** attended the CAIS Summit in Los Angeles.



**Ina Toderita** traveled to San Antonio to Bob Veres' Insider's Forum.



**Andrea Walker and Ina Toderita** attended Pershing's annual conference, in Orlando.



**Susie Wang** spoke on two panels at the 8<sup>th</sup> Annual Private Wealth Southeast Forum.



**Mark Bell** spoke on a panel at the Southeast RIA Summit.

**Alexa Svensson**  
Project Management  
Professional certification

**Jen Pcholinsky**  
Certified Exit Planning Advisor  
Designation, Accredited Estate  
Planner certification

**Reid Brannock**  
Certified Exit Planning  
Advisor designation

**Sara Rydman Baker**  
Financial Planning Certificate,  
Passed the CFP® exam



## Invest In Relationships

Everything we do is **built on trust**, and trust is built on relationships. **Make smart decisions** that enhance long-term relationships. Get to **know your clients**, centers of influence, and colleagues on a more personal level. **Strong relationships** enable us to more successfully work through difficult issues and challenging times.

### With Our Clients

We are grateful to our clients, who **ranked us as "World Class Service providers,"** in the top tier of the Net Promoter Score methodology.

We are proud to have a **99% Client Retention Rate.**

**99%**

*"Our experience with Balentine has been extraordinary and exceeded all expectations. We feel fully supported and have the highest level of trust and regard for our team. We feel a genuine and profound connection to the individuals and leadership at Balentine."*  
Balentine Client

Balentine clients were not compensated via credits or other benefits from Balentine for providing testimonials. Quotes do not necessarily represent all client experiences.

### With Our Team

It has been a **landmark year** for many members of our firm.

**5 Babies**

Welcome to the Balentine family  
**Declan Brannock, Robert Cornell, Walt Sims, Diana Hill and Hattie Reynolds.**

**3 Weddings**

**Megan Cordell, Rebecca Evans and Sarah Stark** married their better halves.

**3 Engagements**

**Jennifer Friberg, Josh Wallace, and Cliff Dortch** got engaged to their significant others.

## Demonstrate a Passion for Excellence.

Take pride in the quality of everything you touch and everything you do. Have a healthy disdain for mediocrity. Good is not good enough. **Pay attention to the details** and take the extra time to get things right the first time. Always ask yourself, **'Is this my best work?'**

### Individual Awards\*

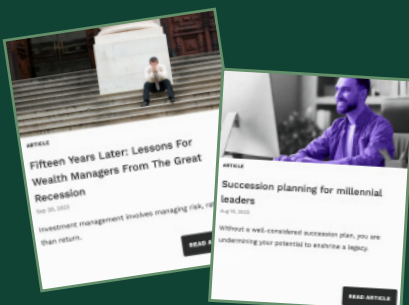
- Adrian Cronje:** Atlanta Business Chronicle's Most Admired CEO
- Jennifer Dangar:** GirlTalk's LeadHER 2023 Inspiration Award Honoree
- Rob Ragsdale:** Triangle Business Journal Corporate Leadership Award Winner
- Robert Balentine:** Barron's Hall of Fame, Barron's Top 100 Independent Advisors, Barron's Top 1200 Financial Advisors
- Robert Balentine:** Atlanta 500

### Firm Awards / Achievements\*

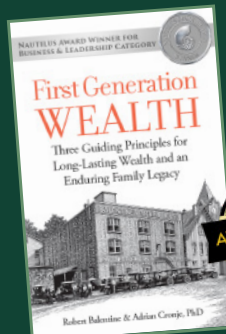
- Citywire: Top 50 Fastest Growing RIAs
- Atlanta Business Chronicle: Atlanta's Top 25 Financial Planning & Advisory Firms
- Atlanta Business Chronicle: Atlanta's Top 25 Money Managers
- Inc.: 5000 Fastest-Growing Private Companies
- Pensions & Investments: Best Places to Work in Money Management
- Financial Planning: 150 Largest Fee-Only RIAs
- InvestmentNews: Top Regional RIAs 2023

### Media

We published more than a dozen articles in *Forbes* and *FastCompany*.



**Forbes**  
**FASTCOMPANY**



We recorded a **First Generation Wealth** audiobook, and the book won three awards.



## Give Back. Pay it Forward.

Regularly seek opportunities to assist those in need. **Express** genuine **gratitude** for the help received by paying it forward and **helping others.** Be a servant leader and put the needs of others before your own.



We volunteered at **Shepherd's Table** (Raleigh), **Junior Achievement** (Atlanta), & the **Ronald McDonald House** (Atlanta).



All told, we've invested more than 250 hours in service to our community.

**250 HOURS**

## Keep Things Fun.

While our passion for excellence is real, the world has bigger problems than the daily challenges that make up our work. Stuff happens. Keep perspective. Don't take things personally or take yourself too seriously. **Laugh every day.**



**Baby Showers**

**Happy Hours**

**Top Golf**

**Balentine Boos**

**Women's Event**

**Quail Hunting**

**Braves Game**

**Open House**

**Pickleball Games**

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