

An All-in-One Solution to Financial Planning



Spend Just One Morning Planning Your Finances for the Year

9 am Meeting with Capital Investment Advisors to review your retirement strategy and investments

10 am Meeting with Norris Legal to build a comprehensive legal plan for your family and/or business

11 am Meeting with Barnes Merritt & Barnes LLC to optimize your tax strategy for the year

12 pm Meeting with Shop Benefits to determine if your healthcare plan for the year is secure

1 pm Leave the office with your financial plan organized and up-to-date for the rest of the year



These firms believe in offering access and availability with strategic partner firms. Each firm is conveniently located on the same floor in the Sandy Springs office. Please note, each firm is under a separate agreement and fee schedule for clients. There is no obligation to engage the services of any or all strategic partner firms. Not all strategic partner firms, and their services, will be suitable for everyone.