

# Children's Legacy Advisors

January 2018



\*Denotes Legacy Advisor Leadership Council Member

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The Anderson Law Practice, LLC
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5. Richard Barnes\* – BarnesLaw, LLC
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9. Brent Blair – Capstone Financial
10. Mary Catherine Bloodworth – Capstone Financial
11. Sarah Boone – UBS Financial Services, Inc.
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13. Chris Broyles – Veracor
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24. Kim Sexton Collins\* – U.S. Trust
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27. Krista L. Cosgrove – ZWJ Investment Counsel
28. Scott Crenshaw – SoundRiver Advisors
29. Audrey Croft – Ameriprise Financial
30. Shannon Crowder –  
BNY Mellon Wealth Management
31. Sonia Crumpler – SunTrust Bank
32. Blair Cunningham – SignatureFD
33. William C. Curtis – Merrill Lynch
34. Brian David – UBS Financial Services
35. Chip Davis – Strickland Davis
36. Elizabeth S. Davis – Northwestern Mutual
37. Mike Devine – J.P. Morgan
38. Nikola R. Djuric – The Bowden Spratt Law Firm
39. Shelly Donaldson – The Donaldson Law Firm, PC
40. Mark S. Drake – U.S. Trust
41. Bill Dukes – Dukes and Company, Inc.
42. Dana S. Durrett –  
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47. Robert W. Fell III\* – Atlantic Capital Bank
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49. Abbey Flaum\* – Cohen Pollock Merlin & Small
50. Carl Free – Carl S. Free Attorney at Law
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52. Chris Gabriel\* – Merrill Lynch
53. Bryan Galat – DearthGalat LLC
54. Matt Garrett\* – Enclave Advisors, LLC
55. Lige Gillis – UBS
56. Geoff Gober – SunTrust
57. Charles B. Gray, CFP – JOYN Advisors, Inc.
58. Amanda Hager – BB&T Wealth
59. Hayley Strong Hall – Davis, Matthews & Quigley
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63. David H. Hern\* –  
Alvarez & Marsal Valuation Services LLC
64. Max Hilsman – Morgan Stanley
65. Brent Howard – Bryan Cave, LLP
66. Jordan Hutchison – JOYN Advisors, Inc.
67. Barry Hyman – Veracor
68. Michael D. Imber – PNC Wealth Management
69. Stuart Jackson\* – The Jackson Group
70. Kristi Johnson – Windham Brannon
71. Charlie Jordan\* – Brightworth
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73. Jacob L. Kaplan – Alston & Bird, LLP
74. Howard Katz – Linea Private Wealth Management
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The Piedmont Group of Atlanta
76. Bryan Kiss – Fifth Third Bank
77. Nicole Klein – Signature Bank of Georgia
78. Wendy Williams Kopp –  
Capital Group Private Client Services
79. Austin K. Lee\* – SunTrust Bank
80. Whitney Lee – oXYGen Financial, Inc.
81. Kristen Lewis\* – Smith, Gambrell & Russell
82. Stacy M. Lewis – TrueWealth Management
83. Kasey Libby – The Libby Law Firm
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86. Craig MacKenzie – The Craig MacKenzie Company
87. Evan Mann – Northwestern Mutual
88. Beth Mayfield – Greenberg Traurig
89. Katie McGrath – UBS
90. Kevin McGrath – UBS
91. Tiffany McKenzie – Bryan Cave, LLP
92. Chad Meisner – Ameriprise Financial
93. Amy Merrill – TrueWealth Management
94. Janet Mertz – Pathstone Federal Street
95. Robert Meyring – Meyring Law Firm

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99. Terri Munro – BT Wealth Management
100. Keith Oelke – Attorney
101. Ray Padron – Brightworth
102. Gena Pappas – Prudential
103. Jeffrey Peller – SignatureFD
104. Skip Perkins –  
Ronald Blue & Co. Family Office
105. Niv Persaud, CFP – Transition Planning  
& Guidance
106. Joe Petriccione – Regions Bank
107. Dave Polstra – Brightworth
108. Michael Pond\* – U.S. Trust
109. Justin Porter – JJM Wealth Advisors
110. Frieda Rakhman\* – SunTrust Bank
111. Tom Reynolds – Thomas B. Reynolds, PC
112. Leah Rice – Windham Brannon
113. Megan Richards –  
Gregory, Doyle, Calhoun & Rogers
114. Josh Rosenberg –  
Bernstein Private Wealth Management
115. Kim Schnoes – Peachtree Planning Corporation
116. Jeffrey T. Schultz – Schultz Wealth Management  
of Raymond James
117. Neeli G. Shah –  
The Law Offices of Neeli Shah, LLC
118. Timothy Sheehan –  
BNY Mellon Wealth Management
119. Howard Silvermintz –  
Nationwide Medicare Solutions
120. Danielle Singleton –  
Singleton Legal & Lifestyle Management
121. Wes Slagle\* – Goldman Sachs
122. Elizabeth Snyder – Fifth Third Private Bank
123. Jim Spratt – The Bowden Spratt Law Firm
124. Chris Staples – Wealth 360, LLC
125. Michael Stogner – U.S Trust
126. W. Michael Strickland –  
Strickland and Lindsay, LLP
127. Andrew Sullivan – Sullivan & Schlieman
128. Justin Sullivan – PNC Wealth Management
129. John F. Thomas III – WealthMD
130. Michael W. Thompson – Duggan & Massey
131. Tony Turner – Cohen Pollock Merlin & Small
132. Kyle Ulep – Prudential Capital Group
133. James Underwood –  
Nova Wealth Management Group
134. Teddie L. Ussery – Family Office Matters
135. Melissa Walker – Salo & Walker
136. Laura Wartner – Smith, Gambrell & Russell, LLP
137. Alexander Watts – Merrill Lynch PBIG
138. Laura Wellon\* – UBS
139. Justin Willmott – WealthMD
140. C. Brooks Woodruff – UBS