

# Wealth Management Firms Whittier Trust, Homrich Berg Join Family Enterprise USA as Sponsors Supporting Family Businesses

WASHINGTON , DISTRICT OF COLUMBIA, UNITED STATES, October 1, 2022 /EINPresswire.com/ -- Two large family business wealth management firms, Whittier Trust and Homrich Berg, have joined [Family Enterprise USA](#) as sponsors.

Whittier Trust, based in South Pasadena, is one of California's largest private wealth management firms offering family office and concierge services. Started in 1935 by the Whittier family, pioneers in California real estate and petroleum, Whittier Trust today manages over \$20 billion in assets and operates with seven offices in California and Nevada. In the last five years Whittier has doubled its size.



Homrich Berg has over 2700 family relationships nationwide in 46 states, managing over \$11 billion in assets. The Atlanta-area based family business wealth management firm focuses primarily on corporate executives, entrepreneurs, families, family trusts and foundations, and not-for-profit institutions. Founded in 1989 by Andy Berg and David Homrich, the partners saw an emerging local need in the financial services industry, especially a need for individualized and fiduciary wealth management services for families, individuals, and not-for-profit organizations.

"Both Whittier Trust and HomRich Berg are leaders in their markets when it comes to managing wealth for multi-generational family businesses," said Pat Soldano, President of Family Enterprise USA. "We are delighted to have their support for our organization as sponsors," Soldano said. "I want to thank Whittier Trust's Executive Vice President and General Counsel Bob Renken and Homrich Berg's Principal and President Thomas Carrol for their support. We look forward to their insights in helping family businesses prosper."

Soldano is also President of Family Enterprise USA's sister advocacy organization, Policy and Taxation Group, based here.

Whittier Trust was started by Max Whittier, founder of early California oil and gas firm, Belridge Oil. In 1979, Belridge was sold to Shell Oil for \$3.65 billion, the largest sale of its kind at that time. Through multiple generations, Whittier Trust has grown into the preeminent multi-family office headquartered on the West Coast.

Homrich Berg, founded in 1989, offers several levels of wealth management client service, including one called Family Guide for clients with \$1 million – \$2 million in investable assets focused on core financial planning and investment management services most relevant to those clients. In 2021, the firm expanded to Palm Beach Gardens, Fla., and has plans to expand with more offices outside of Atlanta.

#### About Family Enterprise USA

Family Enterprise USA promotes family business creation, growth, viability, and sustainability by advocating for family businesses and their lifetime of savings with Congress in Washington DC. FEUSA represents and celebrates all sizes, professions and industries of family-owned enterprises and multi-generational employers. FEUSA is a 501.C3 organization

Pat Soldano

Family Enterprise USA

+1 714-357-3140

pmsoldano@family-enterpriseusa.com

---

This press release can be viewed online at: <https://www.einpresswire.com/article/593552105>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2022 Newsmatics Inc. All Right Reserved.