

Balentine Expands Business Advisory Services, Adds Joe Fahey as Senior Family Business Advisor

ATLANTA, GA, UNITED STATES, April 25, 2023 /EINPresswire.com/ -- Balentine, an independent wealth management firm focused on serving entrepreneurs and their families, announces an expansion of Business Advisory Services with the appointment of Joe Fahey, CFA®, as Senior Family Business Advisor.

“We look to help families navigate transition events successfully and have

built a differentiating expertise in business advisory for entrepreneurial businesses to do so,” said Adrian Cronje, Ph.D., CFA®, CEO of Balentine. “Beyond excellence in financial planning and asset management, our deep expertise in management consulting and capital markets has

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helped keep millions of dollars inside intergenerational families to power their legacies.” Since 2019, the Business Advisory team has advised on over \$2 billion of transactions, refinances, and sales of family-run businesses.

Joe Fahey joins Balentine as a consultant following a 30-year career as national director for business succession planning for Wachovia/Wells Fargo and PNC Bank. Working from Balentine’s offices in both Raleigh and Atlanta, Fahey brings an industry-leading strategic planning model and process that he developed exclusively for high-net-worth business owners.

“Organizing and simplifying complex financial and shareholder dynamics, educating clients and stakeholders as plans change, and executing on succession planning are some of the biggest challenges business owners face,” said Fahey. “I’m impressed with Balentine’s commitment to



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serving entrepreneurs and family business owners and look forward to adding value to our business advisory clients.”

Mark Bell, Ph.D., Head of Business Advisory and Private Capital, Multi-Family Office Investment Strategist, said that Joe Fahey will build upon the work the Business Advisory Team is already doing, including bespoke consulting acknowledging that every business, and every owner, is different when it comes to exploring succession and business exit strategies.

“We don’t walk into conversations assuming any one outcome is correct; instead, we help business owners parse through options to maximize outcomes,” explained Bell. “This way, business owners are supported and confident as they explore and decide what’s next for their family and their business.”

Bell went on to say that Balentine’s unconflicted approach includes engaging knowledgeable, experienced subject-matter experts to provide unbiased advice, a bench that Joe joins and will work to strengthen as he and the Business Advisory team help business owners think through what’s next for their business — whether it’s to keep it or to sell it — by identifying options, walking through each one with them, and then assisting with execution.

“Families with intergenerational wealth need deep expertise beyond their portfolios,” said Bell. “The outdated approach of helping intergenerational families with only their liquid investable assets needs to be relegated to the time when stockbrokers roamed the earth. We have helped dozens of families with business decisions worth billions of dollars that have been crucial to helping them preserve and propel their legacy. Joe re-doubles our effort in this area.”

The role of Business Advisory at Balentine is to give business owners an expert and unconflicted partner when it comes to the big decisions that entrepreneurs face when they think about how to maximize their outcomes. With experience working with businesses of varying size and across industries, ranging from internet, medical, software, industrial supply, human and medical animal practices, industrial services, food services and hospitality, consumer packaged goods, auto industry, and real estate, Balentine’s Business Advisory is available to all clients who may be asking questions such as, “What is next for my business? When is the right time to transition my



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business? What's my business worth?"

After nearly four decades of working with entrepreneurs, the team at Balentine understands that business owners often need additional counsel when it comes to succession planning, particularly when it is a family business.

"For example, an entrepreneur may ponder how to create provisions in his or her business succession plan to accommodate one adult child who is an employee and two who are not," explained Bell. "In scenarios like this, we understand that deciding what is best for the business will also involve deciding what is best for the family, and we're prepared to help walk through those separate, though intertwined, conversations."

That counsel is led by Balentine's Relationship Managers, a client's primary point of contact, who are comfortable guiding discussions beyond the right portfolio construction through considerations surrounding the transition of a business or ways to talk to family members about legacy- and they advise on when to pull in one of the firm's subject-matter experts on wealth and legacy, financial planning, or business advisory.

About Balentine

Balentine is a wealth management firm that aims to help entrepreneurs and their families ensure the wealth they've created will endure for generations. With wealth management, financial planning, business advisory, and legacy planning services, Balentine creates custom, holistic solutions for entrepreneurs at every stage of their careers. Today, Balentine offers its wealth of perspective to over 300 clients nationwide, advising on approximately \$6.5 billion of assets.

In nearly four decades of serving clients, Balentine is consistently recognized as a top financial planning and advisory firm by Forbes, Barron's, The Financial Times, and InvestmentNews. An independent, employee-owned firm with offices in Atlanta, Ga., and Raleigh, N.C., Balentine is also a perennial winner of the Pensions & Investments Best Places to Work in Money Management Award.

For more information, visit: <https://www.balentine.com/>

Balentine is an investment adviser registered with the U.S. Securities and Exchange Commission (SEC). Registration does not imply a certain level of skill or training. More information about Balentine's investment advisory services can be found in its Form ADV Part 2, which is available upon request.

Meredith Fenwick
Balentine
+1 984-355-5210

mfenwick@balentine.com

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