

# Balentine's New Office Space Accommodates Growth, Prioritizes Employee and Client Experience

RALEIGH, NC, UNITED STATES, June 1, 2023 /EINPresswire.com/ -- Balentine, an independent wealth management firm advising on over \$6.5 billion of assets, announces a new address and office space for its Raleigh team to accommodate its continued growth. Balentine's nearly 7,000-square-foot space at 301 Hillsborough is more than double the size of its prior downtown location.

The firm has more than tripled assets under advisement since the end of 2017, reaching \$6.5 billion AUA as of March 31, 2023. This puts Balentine in the top 1% of Registered Investment Advisors in the United States by AUA, according to a study by BNY Mellon's Pershing. Balentine was recognized as one of Barron's Top 10 independent advisors in the U.S. in 2022.

Rob Ragsdale, CFP®, AIF®, Head of Institutional Relationships and Raleigh Wealth Management attributes much of this growth to Balentine's focus on providing custom solutions to entrepreneurs and business owners in transition.

"The Southeast is transforming into an exciting hub for innovation and entrepreneurship — and with Research Triangle Park just around the corner, there are many people in our community who want to



Rob Ragsdale, CFP®, AIF®, Head of Institutional Relationships and Raleigh Wealth Management and John Maddison, CFA, CFP® Head of Financial Planning, in the new office.



# BALENTINE

## A WEALTH OF PERSPECTIVE

With investment management, financial planning, business advisory, and legacy planning services, Balentine creates custom, holistic solutions for wealth creators at every stage of their journey.

“

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*Rob Ragsdale, CFP®, AIF®,  
Head of Raleigh Wealth  
Management*

start, grow, and sell a business,” said Ragsdale. We've built our business to go deeper than investments, anticipating questions entrepreneurs have about their full financial picture. I think our approach really resonates with them.”

Balentine's office on the ninth floor includes features specifically tailored to clients and their families, with an aim to make the space welcoming to clients of all generations and preferences. There is a traditional boardroom with sixteen seats for presentations, another conference room with a round table for discussions, and a living room with a couch and armchairs for more relaxed conversations. In addition, sitting at the intersection of

Raleigh's four downtown districts, 301 Hillsborough is steps away from the best restaurants and coffee shops the city has to offer, providing additional client meeting options.

"At the end of the day, the most exciting part of this move is that it allows us to take better care of our people," said Ragsdale. "Our top priority is creating a space where our clients feel comfortable and our employees have the resources to succeed."

The office was also thoughtfully designed with employees in mind, with space for collaboration, camaraderie, focus, and relaxation. The open kitchen at its center is a natural meeting point. Focus rooms provide those who work in the open office with privacy for work and personal needs alike. Additionally, 301 Hillsborough provides tenant amenities such as a fitness center, outfitted with locker rooms and offering free fitness classes; a lounge with comfortable collaboration areas; and a full kitchen. These spaces open to a terrace with sweeping views of downtown Raleigh.

"We feel like our new home is the perfect place for the next phase of our business in Raleigh," said Ragsdale. And with the option to expand beyond the office's current footprint, Balentine has plans to continue its upward trajectory.

## About Balentine

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

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