

Homrich Berg, Whittier Trust Wealth Management Firms Support Family Businesses with New FEUSA Sponsorships

WASHINGTON, DISTRICT OF COLUMBIA, UNITED STATES, December 26, 2023 /EINPresswire.com/ -- Wealth management firms Homrich Berg and Whittier Trust have renewed sponsorships with Family Enterprise USA, advocates for America's family businesses.



[Atlanta-based Homrich Berg](#), managing over \$11 billion in assets for over 2700 family relationships nationwide, is again sponsoring Family Enterprise USA's work on Capitol Hill. Homrich Berg's focus is primarily on corporate executives, entrepreneurs, families, family trusts and foundations, and not-for-profit institutions.

[Whittier Trust, based in South Pasadena](#), has also renewed its support for non-profit Family Enterprise USA, based here. Started in 1935 by the Whittier family, pioneers in California real estate and petroleum, Whittier Trust 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. It is now one of California's largest private wealth management firms.

"We are excited to have both HomRich Berg and Whittier Trust continue their support for the important work fighting for America's family businesses," said Pat Soldano, President of Family Enterprise USA. "They lead the way in their markets, and they understand the need to get the message out on the critical role of multi-generational families in our economy," she said. "We are again delighted to have their support for our organization, and our work, as sponsors."

Homrich Berg was founded in 1989 by Andy Berg and David Homrich when the partners saw an emerging need in the local Atlanta financial services industry, especially a need for individualized and fiduciary wealth management services for families, individuals, and not-for-profit organizations. In 2021, the firm expanded to Palm Beach Gardens, Fla., and has plans to expand with more offices outside of Atlanta.

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.

About Family Enterprise USA

Family Enterprise USA promotes generationally owned family business creation, growth, viability, and sustainability by advocating for family businesses and their lifetime of savings with Congress in Washington DC. Since 2007, Family Enterprise USA has represented and celebrated all sizes, professions, and industries of family-owned enterprises and multi-generational employers. It is a bi-partisan 501.c3 organization. www.familyenterpriseusa.com

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