

Advocacy Wealth Management and Montag & Caldwell Join Forces

ATLANTA, GEORGIA, UNITED STATES, August 2, 2024 /EINPresswire.com/ -- The [Forge](#) Companies proudly announce their registered investment advisory firm, [Advocacy](#) Wealth Management (AWM), has joined forces with [Montag](#) & Caldwell (M&C), one of

Atlanta's first independent investment advisory firms, to provide premier financial services. Tommy Johnson, CEO of AWM, stated, "This partnership allows us to diversify our revenue streams into business lines where we previously had limited presence, such as institutional investments and ultra-high-net-worth clients."



Charlie Markwalter, CEO of Montag & Caldwell, expressed his enthusiasm, saying, "Montag & Caldwell has a rich history of offering proprietary investment products. Advocacy Wealth Management specializes in assisting clients with complex financial planning needs. By bringing together Montag & Caldwell's eight Chartered Financial Analysts with Advocacy Wealth Management's ten Certified Financial Planners, we are well-positioned to deliver exceptional solutions to all our clients."

AWM is a leading financial planning firm for settlement beneficiaries, serving as a fiduciary to over 1,000 families. M&C caters to ultra-high-net-worth families and institutional clients, and has worked with retirement plans, endowment funds, foundations, state and local governments, hospitals, insurance companies, credit unions, and Taft-Hartley funds. M&C also manufactures investment strategies for other wealth advisors. Despite their different business lines and practices, both firms bring complementary expertise and a diverse clientele.

The transaction that closed August 1, 2024, results in a combined entity managing over \$2.5 billion in client assets, demonstrating the strength of the partnership and the quality of the enhanced financial services provided.

Advocacy Wealth Management will be the successor Registered Investment Adviser. At the same time, Montag & Caldwell, an Advocacy Wealth company (formerly Montag & Caldwell) will continue operating as a distinct member of The Forge Companies.

For questions or additional information regarding this announcement, please contact Beth Allen, Chief Marketing Officer of The Forge Companies, at 706-856-2535 or email info@forgeconsulting.com.

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