Diversified Trust’s Charleston Office Surpasses $1 Billion in Assets Under Management

Milestone reflects the wealth management firm’s rapid growth in South Carolina and the trust of clients and professional partners statewide

Diversified Trust's Charleston office (from left to right) Harris Linch, Mark Green, Alixandra Papaharis, Zachary Fuqua, Ashley Thiem, Eric Main, Taylor Giamundo, Tom Cox, and Cynthia Legette.

CHARLESTON, SC, UNITED STATES, August 13, 2026 /EINPresswire.com/ -- Diversified Trust, an independent wealth management firm, announced today that its Charleston office has surpassed $1 billion in assets under management (AUM), marking a significant milestone in the firm’s growth across South Carolina. The achievement reflects the firm's focus on intentional growth built on trusted relationships and a commitment to delivering personalized wealth management and fiduciary advice.

Located in downtown Charleston, the office is Diversified Trust's newest location and the firm's fifth across the Southeast. Reaching $1 billion in AUM just four years after opening in 2022 highlights the firm's growing presence in South Carolina and the trust clients and professional partners have placed in the Charleston team.

"This milestone is thanks to our clients," said Eric Main, Managing Principal of Diversified Trust's Charleston office. "We're grateful for the relationships we’ve built across South Carolina, and the confidence families continue to place in us. Most of all, I'm proud of our team and the care they bring to serving our clients every day. Reaching this milestone is meaningful, and we are excited to continue growing alongside our clients and professional partners throughout the state."

The landmark occasion also reflects Diversified Trust's employee-owned model and long-term mindset. The firm focuses on attracting exceptional talent and expanding thoughtfully where its culture, values, and approach are the right fit. While each office serves its local community, clients benefit from the collective strength of Diversified Trust, including the resources of a firm overseeing nearly [$15 billion] in client assets and the expertise of professionals across the firm.

"The success of our Charleston office reflects our belief in intentional, organic growth, and with our clients always at the center," said Michael Gragnani, Successor CEO of Diversified Trust. "Reaching this milestone in just four years demonstrates what can happen when exceptional people, a strong culture, and a long-term perspective come together. We're proud of what the team has accomplished and optimistic about the future."

About Diversified Trust
Diversified Trust is an independent wealth management firm providing investment management, trust and estate administration, and advisory services to individuals, families, and institutions. The firm is committed to thoughtful advice, long-term relationships, and helping clients navigate complexity with confidence.
Learn more at www.diversifiedtrust.com.

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