

Peachtree Planning

Peachtree Planning is a “one-stop shop” for any need you may have, whether it be investing or financial planning. The company, which is headquartered in Atlanta, has 10 employees in their Rome office and has over \$500 million of Life Insurance in force and over \$120 million of investment assets.

“We offer comprehensive financial planning – basically it’s life planning, helping to enrich the quality of our clients’ lives,” said *partner* **Lamar Barden**. Barden, who has been with the Rome Peachtree Planning office since its conception in 1988, credits his company’s success to the extreme hard work and dedication of each planner in the office – **Dr. Lamar Barden, Gordon Hillegas, Rob Harbison, Doug Shows, and Steve Edwards**. “We all work very hard to make this a personal and professional place for our clients,” he said.

The company protects wealth through disability, life and health insurance as well as long-term care insurance, estate planning strategies and buy-sell business continuation plans. They also assist in saving their clients’ wealth by offering debt management, cost recovery strategies, 529 college funding, retirement planning, exit strategies and pension maximization strategies. In addition to these essential tools, Peachtree Planning also helps their clients grow wealth. Investing, mutual funds, tax credit investments, leverage techniques and other wealth coordination strategies creates additional wealth for each of their clients.

Ranked #11 in the top 122 planning and investment firms in the country, Peachtree Planning continues their tradition of excellence for our area. The

General Agents and Managers Association (GAMA) announced that Peachtree Planning Corporation qualified for the highest award offered by the association, the Master Agency Award, ranked 11th. Peachtree Planning is a leading provider of comprehensive wealth planning and client management solutions. The company also ranked #2 in Atlanta’s Top Life Insurance Agencies and #7 in Atlanta’s Top 25 Financial Planning & Advisory Firms.

“Our company benefits from our Chamber membership. The activities help our business and that of our clients. Several of my clients are small business owners, which has sparked my interest in becoming active with the Small Business Action Council (SBAC),” said Rob Harbison. “The SBAC helps each individual promote their own well being by helping themselves and helping others.”



For more information on Peachtree Planning and the services that they provide, contact their office at 706.234.7468 or visit their office on East Second Street near the Clock Tower in Historic Downtown Rome. ■

