

MARKET BRIEF

Atlanta processes 70% of the country's card transactions. Its wealth management firms are **about to change hands**.

More than 200 fintech companies and over half the country's payments firms are based here, promoters call it Transaction Alley. Wealth managers built in the same market, Blue Trust and HB Wealth among them, are entering the busiest ownership transition the industry has seen in years.

70%

Of US debit, credit, and prepaid card transactions processed in Atlanta

\$65B

AUM at Blue Trust, one of Atlanta's largest RIAs

\$30B

AUM at HB Wealth, an Atlanta-based multi-family office

40K+

Financial services workers across metro Atlanta

THE SUCCESSION WAVE

RIA M&A hit a record in Q1 2026: 142 deals, \$1.67 trillion in AUM changed hands, more than double the \$805 billion transacted in Q1 2025. Nationally, 105,887 advisors plan to retire within the next decade, over a third of the industry's headcount and 41% of its assets. Close to a third of soon-to-retire principals don't have a succession plan yet.

Every one of those transitions needs a CFO who can close a deal's books on schedule and a COO who can merge two firms' operations without losing a client. Atlanta's wealth management firms are hiring for that moment right now.

ROLES WE PLACE IN WEALTH MANAGEMENT

FINANCE & ACCOUNTING

Chief Financial Officer
Controller
FP&A Leadership
Treasury

OPERATIONS

Chief Operating Officer
Head of Operations
Process Transformation

COMPLIANCE & RISK

Chief Compliance Officer
Chief Risk Officer
General Counsel

HR & TALENT

Chief Human Resources Officer
Head of Talent Acquisition

100%

Placement rate on retained searches since 1993

90%

Of our placements earn a promotion within their organization

Top 250

HuntScanlon's 2025 America's Top Executive Search Firms

We've specialized in insurance, wealth management, and financial services since 1993. We know the difference between staffing an RIA through a succession and staffing a family office's first COO hire, and we know it before the first call. The Lyneer Executive Search Strategy™ evaluates every candidate on technical skill, leadership capability, cultural alignment, and long-term growth potential: the four things that actually predict whether a leader succeeds in your firm.

Let's talk about your next Atlanta hire.

The executive search firm for insurance, wealth management, and financial services.

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