



For Immediate Release

**TrueWealth Ranks 4<sup>th</sup> in Nation, Only Georgia Company on “Best Workplaces in Financial Services and Insurance” List from Great Place to Work® and Fortune**

**ATLANTA (July 20, 2016)** – TrueWealth, LLC, one of Atlanta’s leading providers of wealth management services, ranked 4<sup>th</sup> on the list of the country’s [30 Best Workplaces in Financial Services and Insurance](#) and is the only Georgia company in the ranking from the research and consulting firm Great Place to Work® and *Fortune*. The list is based on feedback from more than 41,000 employees in the financial services and insurance sector. Companies with the highest employee rankings for trust, camaraderie, respectful treatment and more make up the top 30.

“Every day at TrueWealth we distinguish ourselves by helping clients meet their financial and life goals, but we could not do that without first highly valuing those objectives for our employees,” said Jim Heard, TrueWealth President and CEO. “Earning such a high spot and being the only Georgia company represented in this *Fortune* ranking is an incredibly proud moment which our family of employees will most definitely celebrate.”

TrueWealth earned this ranking based on employees' anonymous responses to questions about their workplace. The company exceeded benchmarks including issues of fairness, professional advancement, camaraderie and other traits essential to a rewarding career. Among its many employee benefits, TrueWealth offers 100 percent coverage of employee premiums for group medical, dental and vision insurance, four weeks paid time off in addition to a generous holiday schedule, a section 125 “cafeteria” plan, a wellness program, and access to on-site fitness facility, paid parking, and bonuses for business development and employee referrals.

The full listing of *Fortune*’s top 30 companies can be found via #BestWorkplaces or on [Best Workplaces in Financial Services and Insurance](#). The top 10 are:

1. Credit Acceptance
2. PrimeLending
3. ACUIY Insurance
4. TrueWealth
5. Veterans United Home Loans
6. Edward Jones
7. Quicken Loans
8. First American Equipment Finance

9. Total Merchant Services
10. Mountain America Credit Union

"The Best Workplaces in Financial Services and Insurance prove that money isn't everything," said Michael Bush, CEO of Great Place to Work. "While employees give them high marks for compensation, these businesses also offer a level playing field for advancement and consistent opportunities for professional growth. In turn, team members at the Best Workplaces report high levels of commitment and cooperation that give these organizations a competitive advantage."

The Best Workplaces in Financial Services & Insurance ranking is based entirely upon feedback from more than 41,000 employees at Great Place to Work®-Certified companies in the financial services and insurance sector who completed our Trust Index® Employee Survey, responding to questions about how frequently they experience the behaviors that create a great workplace. Results from the survey are highly reliable, having a 95% confidence level and a margin of error of 5% or less. The total score for each company is based entirely upon this employee feedback. The 30 companies with the highest employee ratings compared with organizations of the same size were selected for the list.

The Best Workplaces in Financial Services and Insurance is one of a series of rankings by Great Place to Work and *Fortune* based upon employee survey feedback from Great Place to Work®-Certified organizations.

TrueWealth and its executives routinely earn numerous awards and recognitions, most recently including Best Places to Work in Georgia from *Georgia Trend* ([TrueWealth 2016](#)); AdvisoryHQ's list of the Top 11 Best Financial Advisors in Atlanta (TrueWealth, 2016); the American Institute of CPAs (AICPA) Standing Ovation Award ([Michael Maiorano, 2016](#)); *Financial Planning Magazine's* Top 150 RIA Firms (TrueWealth, 2016); the #1 Best Workplace for Women by *Fortune* and Great Place to Work® ([TrueWealth, 2015](#)); and CNBC Digital's list of the Top 100 Fee-Only Wealth Management Firms in the United States ([TrueWealth, 2015 and 2014](#)).

### **About Great Place to Work®**

[Great Place to Work®](#) is the global authority on high-trust, high-performance workplace cultures. Through proprietary assessment tools, advisory services, and certification programs, including Best Workplaces lists and workplace reviews, Great Place to Work® provides the benchmarks, framework, and expertise needed to create, sustain, and recognize outstanding workplace cultures. In the United States, Great Place to Work® produces the annual *Fortune* 100 Best



Companies to Work For® list and a series of Great Place to Work® Best Workplaces lists, including lists for Millennials, Women, Diversity, Small and Medium companies, as well as lists representing many different industries.

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### **About TrueWealth**

TrueWealth provides independent wealth management services to individuals and families. Founded in 1999 and based in Atlanta, the fee-only advisory firm is known for combining informed expertise with a highly personalized experience to help clients meet their financial—and life—goals. The TrueWealth team, which manages approximately \$1 billion on behalf of more than 300 clients, prides itself on the ability to carefully listen to client needs, address their unique challenges, and help them meet their important financial goals.

The firm recently changed its name to TrueWealth from Windham Brannon Financial Group and continues to provide the same ongoing commitment to its clients by providing independent wealth management services. For more information on the TrueWealth experience, visit [www.truewealth.com](http://www.truewealth.com). Find and follow the firm on [LinkedIn](#), [Facebook](#) and [Twitter](#).

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