

## WEALTH MANAGEMENT

### OVERVIEW

We currently have unprecedented demand for professional investment management and advisory services. As a result, trust and wealth management products and services have become increasingly important sources of fee income, causing financial institutions of all sizes to provide these services.

As individual wealth has increased, financial institutions large and small have begun offering sophisticated wealth management services. Changes in regulatory positions enabling interstate delivery of fiduciary services and interstate trust company operations, coupled with expanded operating powers, have presented banks with an unparalleled opportunity to expand their relationships with some of their best customers. Experience in navigating the sometimes treacherous channels between overlapping regulators - banking, insurance and securities - is essential.

Our financial institutions group has been in the forefront of assisting banks in capturing this new market.

We have:

- Organized trust departments for banks, state and national
- Organized new trust companies
- Assisted banks in acquiring companies that offer wealth management services, investment advisory services, brokerage services, tax services and insurance services
- Represented clients in delivery of fiduciary products nationwide
- Counseled clients on establishing small, community-oriented trust operations
- Assisted clients in outsourcing and joint venturing fiduciary products and services

## MEET THE TEAM



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### **RELATED PRACTICE AREAS**

- Financial Services Corporate & Regulatory Team