



PEACHCAP™

Your Financial Life, Fully Integrated

PeachCap's collaborative client model provides fully integrated tax, wealth, and accounting services to families and businesses. Our unique structure partners industry experts to work cohesively for clients, maximizing the impact of advice and minimizing financial stress.



WHO WE ARE

PeachCap was founded in 1985 as a CPA firm serving Atlanta businesses and families. As business bloomed, clients asked for investment and estate related guidance. Eager to meet our clients' needs and expand our spectrum of advice, PeachCap registered as a broker dealer in 1990. From investments to bookkeeping, PeachCap is a one stop shop for all things tax, wealth, and accounting related.



THE OLD WAY

Conventional wealth management is complicated and frustrating. Your tax advisor tells you one thing, while your financial advisor tells you another. Poor alignment leads to miscommunication, stress, and missed opportunities. The ultra-wealthy are already aware of this problem, so they have dedicated in-house teams called Family Offices to manage their investments and taxes under one roof. All of their financial needs are aligned to create one cohesive strategy.

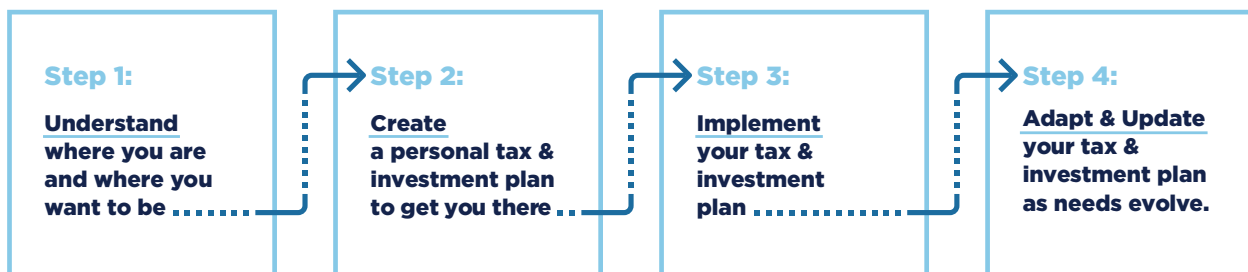
We asked ourselves: why should this only be available to the ultra-wealthy? We believe everyone should have access to these services, so we spent 25+ years cultivating a solution that does exactly this.



THE PEACHCAP WAY

To bring financial services normally reserved for the ultra-wealthy to mainstreet, we have broken down the silos between tax, wealth, and accounting. Your dedicated PeachCap team defines your financial objectives then develops your fully aligned strategy. This personalized plan is then implemented to get you where you want to be.

We do not believe in doing things just because they have always been done a certain way, so we have adapted and embraced change in all aspects of our firm. We believe in having fun and cultivating our team members to be the best they can be to ensure clients receive impactful and personalized guidance.



550 Pharr Road NE, Suite 700 | Atlanta, GA 30305 | 404.220.8958 | PeachCap.com

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