

Advisor Spotlight: J. Preston Byers CPA CFP®

“Lions, Tigers and Bears, oh why?”

*Interview by Brent Hoke
Editor of Designing Wealth Magazine*

We often highlight wealth management firms and the impact that they have had on their clients’ financial lives, but CLEARBRIDGE WEALTH MANAGEMENT, is not only making a significant impact in its clients’ lives but also in the community as well.

Thanks, Brent. That’s right. Being able to give back to the communities in which our clients work, play and live is very important to us. It’s one of our core principles.

What do you mean by “core principles”?

When most people start a new business they develop a lengthy business plan rich with statistics and detailed financial statements. When we started ClearBridge Wealth Management, our entire business plan consisted of just ten core principles. Those principles became the foundation for everything we do. Giving back to the community was one of those core principles. I’ve been very blessed to have had the privilege of advising individuals and families for the last 17 years. Due to our success, we’re in the wonderful position of being able to support worthy causes, so we do.

Obviously charitable giving is very important to you and your firm.

It is. It’s a big driver of our success. We’re keenly aware that the more successful we are as a firm the more resources we will have to support the causes that interest us.

How do you choose the charities with which you work?



Like most firms we support the causes and fund raisers with which our clients are involved, like silent auctions, walkathons and golf events. But we also wanted to pick a limited number of organizations where our level of giving would be more meaningful. Writing a check to a charitable organization is generous, but I think financial contributions make an even bigger impact when they’re supported by the donation of time and talents as well. ClearBridge gave us the opportunity to leverage our financial gifts by creating our Charitable Partners program.

I assume the Wounded Warrior Project (WWP) is one of your Charitable Partners.

Absolutely. Several years ago, we were looking for a way to support the troops, and a client introduced us to the Wounded Warrior Project. At the time, the engagement in the Middle East was in its infancy, and the WWP was just getting started and in need of funding. We decided to host an event to benefit this worthy cause and are still working with them today.



What do they do?

The Wounded Warrior Project assists men and women in our armed forces who've been severely injured during the conflict in Iraq and Afghanistan. Many of these brave soldiers have suffered amputations, gunshot wounds, burns and blast injuries that require time and energy to recover from. On top of that, most are unable to return to their livelihood—military service. They've given so much to protect us all. The Wounded Warrior Project helps them rehabilitate and gives them a fresh start. It's a wonderful organization!

What a great cause. I understand your recent event was a big success.

We were very excited to have played a small part in a recent event that raised almost \$80,000 for the WWP. It was a truly amazing evening! The event has come along way since we started it just three years ago.

I guess you could say these warriors are the brave "Lions"...and now I have to ask about the Tigers.

A friend of mine who knows how much I love animals introduced me to the Chestatee Wildlife Preserve. It's a fully licensed animal rescue and exotic wildlife preserve located about 60 miles north of Atlanta. Chestatee is a sanctuary for orphaned or mistreated animals, a magical place

where they are nurtured back to full health. Chestatee just happens to have the largest collection of white tigers in North America. In addition to these beautiful animals, Chestatee cares for more than 300 other exotic animals including lions, bears, wolves, chimpanzees, and other wildlife, including many endangered species.

So how does a White Tiger fit into your charitable giving strategy?

When we chose our charitable partners, we wanted to balance our desire to make a lasting or tangible difference—for example supporting cancer research—with some things that made life a little sweeter, like putting a smile on a child's face or creating a lasting memory for a child with special circumstances.

The kids get to meet the White Tigers?

They do! In fact, we recently hosted an event for Camp Sunshine, a wonderful organization that works with children who have cancer. We invited the Camp Sunshine kids and their families to Chestatee Wildlife Preserve for a once in a lifetime opportunity to get face to face with the white tigers and the rest of the exotic animals. I don't know who had more fun, the children or the animals. It was a great day. I don't know how you could ever forget those kids' smiling faces. We certainly didn't cure cancer that day, but we made a lot of special memories for some very deserving children who just happened to have cancer.

OK, so Lions, Tigers...and Bears?

Well, being in wealth management, we typically prefer the bulls to bears, but that's a discussion for another interview!

So what's next for ClearBridge?

I can't think of a better way for a wealth management firm to give back to the community than to provide a worthy family with the opportunity of home ownership. I've always wanted to partner with Habitat for Humanity to build a home for someone who otherwise could

not afford one. So we are trying to figure out how to make that happen.

How have your clients responded to your Charitable Partners program?

Our clients are our biggest supporters; they come to the events, they volunteer, they open their checkbooks. In reality we could not do it with out them. They make it all possible. We hope our clients are proud of the organizations we have chosen to support on their behalf.

Thank you for your time, keep up the good work and we wish you and your firm continued success!



Preston Byers, CPA, CFP® is the founder and President of CLEARBRIDGE WEALTH MANAGEMENT, a leading provider of investment and wealth management services located in Atlanta, Georgia. He can be reached at 770-350-9605 or at pbyers@clearbridgewealth.com. Securities and financial planning services offered through LPL Financial, Member FINRA/SIPC. Brent Hoke from Designing Wealth Magazine is not affiliated nor endorsed by LPL Financial.