



## Harlan Partners Joins Crescent Wealth Management

**ATLANTA, GA – Dec. 1, 2023** – Crescent Wealth Management is pleased to announce Harlan Partners as its newest Affiliate Partner. This partnership brings an expanded scope of services in the financial and insurance industry, allowing the managing partners of Harlan to offer more sophisticated solutions to their clients.

Both Crescent and Harlan are Lion Street owner firms. “Lion Street was created for professional advisors to provide resources and influence at scale unachievable in a local market.” said Bob Carter, Lion Street Founder and CEO. “The best get better when they unite around a common mission of providing the best client solutions.”

Based in Birmingham AL., Harlan Partners was built on the knowledge from seasoned advisors over the past three decades culminating in an elite network of firms and relationships allowing them to specialize in solutions for high-net-worth individuals, family offices, business owners, and corporate clients. This allows them to provide a dynamic understanding of how to best serve clients, both for today and for the generations to come. Stephen W. Holbert and his wife Kelly M. Holbert, the managing partners of Harlan will operate as Crescent Birmingham as part of the partnership.

The managing partners at Harlan offer a wide range of planning resources to their clients, including investment and retirement planning, estate planning, business insurance and life insurance planning for families. This new partnership brings a more collaborative approach to their clients, with a multi-disciplined team available for an expanded service profile.

“After having known and worked with the partners of Crescent over the last decade, we are pleased to announce that we’ve partnered with them to deliver comprehensive financial planning strategies to our clients,” said Stephen Holbert, managing partner of Harlan Partners. “Crescent has a proven track record of serving ultra-affluent clients and families, and vast resources to best support our firm.”

The Harlan managing partners align perfectly with Crescent’s culture and vision for collaborative firm growth. Crescent is honored to have Stephen and Kelly become part of the family and looks forward to growing a great company together.

“Stephen and Kelly have a storied history in our business and are uniquely positioned to continue their legacy,” said Dave Herrig, Head of Firm Development at Crescent. “We are thrilled at the prospects of helping further define and develop their business model while driving incremental revenue to their bottom line.”



## **ABOUT CRESCENT WEALTH ADVISORY**

Crescent Wealth Advisory represents an integration of asset protection and asset management competencies. This powerful combination ensures a transference of industry expertise, unlimited access to best-in-class investment solutions, and an expanded network of service providers. Crescent's earned trust and objective advice make us "the first call" for our clients – and their advisors – when they are faced with both financial and non-financial events, ranging from the sale/acquisition of a business, to lifetime milestones, to the request for personal introductions. Working with Crescent Wealth Advisory is your opportunity to achieve more. To learn more about Crescent, please visit [www.crescentwealthadvisory.com](http://www.crescentwealthadvisory.com) or connect with [LinkedIn](#).

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## **ABOUT LION STREET**

Lion Street is a leading financial services company based in Austin, Texas. Lion Street provides elite independent life insurance and wealth advisory firms access to the financial products, intellectual capital, and specialized resources they need to meet the sophisticated needs of high-net-worth and corporate clients. Every affiliated financial advisor is a stockholder of Lion Street. Together, Lion Street's Owner-Firms are strongly committed to building a fiercely independent, yet highly collaborative network of professionals. To learn more about Lion Street, please visit [www.lionstreet.com](http://www.lionstreet.com) or connect with [LinkedIn](#).

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