



## **Homrich Berg Opens Tampa Office With Experienced Family Office Advisors and Welcomes Larry Parkin to Lead Florida Market**

*Leading \$18 billion RIA opens office in Tampa with a veteran team of family office professionals who previously managed over \$4 billion in assets as footprint in Southeast Region grows*

**ATLANTA** - October 28, 2024 — [Homrich Berg](#) (HB), a leading Atlanta-based registered investment adviser (RIA) serving families and investors across the country from its offices in the Southeast, welcomes industry veteran Larry Parkin, CFP® and an experienced family office wealth advisor team he previously led in Tampa to support its growing footprint in Florida. Parkin joins the \$18 billion firm as Principal and Florida Market Leader to head up the new Tampa office, the company's second location in the state after opening in [Palm Beach Gardens in 2021](#).

With 25 years of wealth management experience, Parkin comes to HB after a two-year retirement, embracing his new role as a fresh opportunity to create a positive impact in the financial services industry. Most recently serving as a Managing Director leading West Florida for Truist Private Wealth Management, he spent his career managing teams of credentialed, client-centric advisors, serving high-net-worth and ultra-high-net-worth families in central and western Florida.

Alongside Parkin, 11 wealth management professionals are joining the HB Family Office team and will work out of the new Tampa location. Lex Smith, CFP®, Ryan Best, CFP®, Keith Johnson, CFP®, Brad Glover, CFA, and John Willoughby, CFA, are joining the team as Principals. Steve Cass, CFP® will join the firm as a Managing Director, and Drew LaGrande, J.D., LL.M., will join the firm as a Managing Director and Family Wealth Strategist. Other members of the team include Benjamin DePalmo, Melissa Baron, Marjorie Sjostrom, and Casey Jackman. This team has decades of experience working with ultra-high-net-worth families in wealth planning, estate planning, and sophisticated investment management.

"I came out of retirement because I was excited to take on a leadership role for a leading independent wealth management firm with a fiduciary, fee-only approach to putting families and their financial goals at the forefront of their work," explains Parkin. "Getting to know the leadership team's vision of client-oriented culture showed me that I made the right decision to align with HB — it felt like home."

Parkin will work to scale the Florida region and recruit top-tier talent as HB expands in the Southeast region. The HB Family Office provides families with a comprehensive range of wealth management services across generations.

“At HB, we want to be known as a destination for talented advisors who support our mission of delivering comprehensive, fiduciary, fee-only advice to our clients. We are thrilled to welcome Larry, and this experienced elite team to HB as an important step in our strategic expansion in Florida. I have known this team for years, and I am confident in their ability to deliver the HB Difference to meet the complex needs of our HB Family Office clients,” says Thomas Carroll, CEO of Homrich Berg.

Since becoming CEO earlier this year, this marks the first major wealth management team joining with Carroll at the helm following the installation of a [Chief Advisory Officer](#) and [Head of Corporate Development](#) to build out the firm’s leadership team as well as the recently announced new [Chief Marketing Officer](#).

### **About Homrich Berg**

Founded in 1989, Atlanta-based Homrich Berg is a national independent wealth management firm that provides fiduciary, fee-only investment management and financial planning services, serving as the leader of the financial team for our clients, including high-net-worth individuals, families, and not-for-profits. Homrich Berg manages over \$18 billion as of September 30, 2024, for more than 3,600 family relationships nationwide.

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