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Meet
Billy & George Greer
Greer Wealth Management

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Greer Wealth Management

From Generation to Generation

Meet Billy Greer & Sons

While growing up in the 1950s in Felton Homes, one of Macon's oldest public housing projects, **Billy Greer** didn't expect to have a career in wealth management. Billy also didn't expect to still be working in 2022. But due to overall good health and good fortune, Billy remains active today with Greer Wealth Advisors of Raymond James here in Macon.

After 20 years working in law, founding his own law firm and working on numerous economic development projects in a volunteer role, Billy's son **George Greer** didn't expect to leave the law career to join the family business. But, due to his family's persistence and a growing perspective of what really mattered to him, George resigned from the law practice in early 2021 and joined **Greer Wealth Advisors** in order to work with his father, Billy, and brother, **Hal Greer.**

IHL: Tell us a little bit about your team's strengths.

BG: We have a strong team at GWA with my sons, Hal and George, plus Crawford Peace, Sheri Haugabook, Ryan Emory and Matthew Fox, all bringing various skills and experiences to help serve our clients' needs. We have well over 100 years of experience managing money and advising our clients on their changing life circumstances, and we have so much continuity in our team. In fact, our administrative team, consisting of Mai Kulkarni, Mary Charles Dunn and Lois Renfroe, has over 50 years' combined experience and helps to keep our team running smooth and servicing our clients' needs on a timely basis.

IHL: How has the services you provide changed during your career?

BG: When I started in the business, we were really focused on trades and making a client money on a particular stock. But over time, this business has evolved to where we help people grow their wealth, manage their wealth and ultimately transfer their wealth. And our team has evolved to meet these needs for our clients — Hal is nationally recognized in our profession by both *Forbes* and *Barron's*, and George has almost 20 years' experience with estate planning and land use in his prior career as an attorney here in Middle Georgia. You combine that with Crawford, Matthew, Sheri and Ryan's age and experience, and you have a very strong team that can serve our clients' needs through a rapidly changing market.

IHL: What have you enjoyed the most about working in wealth management?

GG: In my former law practice, my favorite part about being an attorney was counseling people and discussing their options to help them make sound legal decisions. But as an attorney, you are dealing with people's liabilities on a daily basis. As a financial advisor, I work a lot with Raymond James' retirement planning software and use it to forecast planning options for our clients. The software leads naturally to conversations where I am able to counsel our clients on their financial opportunities and help them make sound financial decisions. So I use the same counseling skills developed in my prior career to help people make good decisions about their assets, which is much more pleasant than working with someone's liabilities.

BG: I have enjoyed the friendships I have made with my clients over decades of working together and seeing how the growth of their assets over time makes a real difference in their lives and the lives of their children. Our goal is to help our clients enjoy their life and create multi-generational wealth for their families.

IHL: What life decisions had the biggest impact on you?

BG: Going to Naval Officers Candidate School after college. I graduated from OCS and spent three years on a ship with several tours in Vietnam. The discipline my service taught me was an asset throughout my career, and I ended up spending 25 years in the Navy reserves before retiring as a captain.

GG: Honestly, marrying my wife, Anna, and going to work with my family.

IHL: What do you enjoy most about working in a family business?

GG: I have never worked with my family before on a daily basis, and I enjoy being able to discuss issues with my brother and father and hear their thoughts and perspectives in real-time. Dad can talk about the oil shocks of 1973 with a historic view that is fascinating and insightful — I was born in 1973. As an added bonus, our personal relationships and family bonds are strengthened every day by seeing each other in action, which is invaluable. I admire Dad and the arc of his life more and more as I get older and realize how wise and accomplished he really is.

BG: At my age, I enjoy consulting with our team and being a part of their energy and enthusiasm. It helps keep me young! Plus, I get to work with my two sons and my friends every day. I consider myself the luckiest man alive.

Hal Greer

George and Billy Greer

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