GH&I

Terry Hartigan, CFP®

PRINCIPAL, TAX

Terry Hartigan, a Principal in the tax department of GH&I, develops comprehensive wealth management and financial planning strategies for the firm's high-net worth individual clients. Since joining the firm in 2002, Mr. Hartigan has worked extensively with the firm's investment partnership clients, and he has helped a number of funds maneuver through the intricacies of performance incentive or partner allocations, high water marks, hurdle rates and side pockets.

CAREER HIGHLIGHTS

Since 1993, Mr. Hartigan has been a financial advisor for individuals, helping them design and implement plans to manage their wealth tax-efficiently to achieve their lifetime goals. He has worked toward that end in a number of capacities, from managing the private wealth and business affairs of an individual client to forming his own fee-only financial advisory company, prior to joining GH&I.

AFFILIATIONS AND EDUCATION

Mr. Hartigan is a member of the Georgia Chapter of the Financial Planning Association, the Southeastern Hedge Fund Association (SEHFA) and the Technology Association of Georgia (TAG). He is also a member of GH&I's technology industry group. Mr. Hartigan has further been a guest several times on CNBC's *Power Lunch*.

Mr. Hartigan earned his B.B.A. in finance from the University of Georgia. In May 1997, he completed the CFP Professional Education Program through the College for Financial Planning in Denver, Colorado. Later that year, he earned his Certified Financial Planner (CFP®) designation and passed the Series NASD Exam.