

Phillip Nelson

Relationship Manager



"The way you do anything is the way you do everything."

Phillip Nelson serves as a Relationship Manager at Persium Group. He has more than three decades of experience in the financial services industry, with a particular focus on working with entrepreneurs, business-owning families, corporate executives, high-income professionals, and beneficiaries of legacy wealth.

He specializes in both managing portfolios and developing planning strategies designed to help clients and their families make informed decisions about their wealth. Central to his work is multigenerational wealth education. He works closely with clients and their families, especially children and grandchildren, to help them understand the responsibility that comes with maintaining and growing a family legacy in a manner consistent with the wishes of those who built it. He also partners with clients' CPAs and attorneys to coordinate wealth and estate planning strategies designed to support long-term growth and tax-efficient transfers to future generations.

Phillip holds the Chartered Financial Analyst (CFA) designation and graduated with a BBA in Finance from the University of Georgia in 1996. A native of Augusta, Georgia, Phillip and his wife Norris have a daughter, Helen, and a son, Hollis, both of whom are in college. He is the past Board Chair of the Historic Oakland Foundation, which supports Oakland Cemetery in downtown Atlanta.