Patrick Callahan JD

Director of Business & Estate Planning

The Callaway Black Group

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Professional Specialties

Business Succession and Estate Planning
Fee-Based Financial Planning
Employee and Executive Benefits Planning
Business Risk Management
Retirement Income Planning
Wealth Management
Private Client Services
Investment Strategies
Business Valuation Planning

Qualifications

EDUCATION

Patrick received his B.A. in International Economics and Finance, magna cum laude, from the Catholic University of America in Washington, DC where he recevied the Henry Speigel award for Economics.

He earned his law degree from the Georgia State University College of Law where he received awards in Business Planning and International Business Transactions. Patrick remains a member in good standing with the Georgia Bar.

Patrick holds his general securities license (Series 7) and is licensed to sell insurance in states across the country.

My Mission

To help business owners clearly identify the goals that reflect their main principles and priorities, and to help those individuals design and implement long-term strategic plans to achive those goals and go beyond.

PROFESSIONAL BACKGROUND

Patrick is the Director of Business and Estate Planning with Northwestern Mutual's Callaway Black Group in Atlanta.

Prior to joining Northwestern, Patrick co-founded a boutique law firm in Atlanta where he specialized in corporate law, business organization planning, asset protection, tax planning, and trusts & estate planning. Before practicing law, Patrick worked with Arther Andersen and Deloitte Tax providing international tax consulting and multistate tax consulting mostly to Fortune 500 and multinational companies.

Building on his business, legal, and tax backgrounds, Patrick now works primarily with business owners. He guides you through a consultative decision making process that begins by helping you clarify your top professional and personal goals based on your main principles and values. After clearly defining your mission, vision, values, and goals, then Patrick can help you build and implement the most strategic plans to achieve those long-term business and personal goals that reflect your key principles and top priorities.

Patrick regularly assists business owners with business exit strategies, family business transfers, buy-sell planning, management buyout plans, and estate and trust planning.

Personal

FAMILY

Patrick was born and raised in Atlanta and married his high school sweetheart, Elisabeth, in 2003. They have an energetic and outgoing daughter named Fiona and a baby girl named Keira. Patrick is active in his community, serves as president of his neighborhood swim and tennis club in Peachtree Corners, and assists in coaching Fiona's sports teams.

Our Personalized Planning Approach

Our planning process is not a one-size fits all template, rather it's tailored for each individual client. Your values and aspirations are unique, so it only makes sense that your path to financial security should be too. Our process is comprehensive and personalized for your circumstances—providing customized solutions that match your life stage and financial ability.

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