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Comprehensive Service Combination and Team Depth

Moran Wealth Management

For over 30 years, Moran Wealth has been providing a comprehensive combination of investment management and estate planning strategies, with a deep team of two chartered financial analysts, three CFP® Certified Financial Planner professionals, two senior portfolio managers and two MBAs. "Many practices do either investments or planning," explains founder and CEO Tom Moran. "We look at the overall picture: risk tolerance, income needs, growth objectives, time horizon and estate planning strategies. It all works together in a coordinated fashion.

Tom Moran, CEO and Founder

The Service Clients Expect

"I don't know of another group that combines it all the way we do, with multiple asset classes, 20 investment models, and the depth of service that high-net-worth clients expect."

He gives an example of a client using Moran Wealth's range of services: "Recently we were approached by a family that had sold their company; it was a very complex situation with multiple generations, U.S. and foreign holdings, foundations, personal accounts and corporate assets. We developed a comprehensive plan that included investment advice for key personnel and the corporation. The client was very excited we could integrate all our strengths. We worked with the presidents, CFOs and other key individuals on their charitable and personal assets. The plan included an investment plan for all the entities. Implementation was very successful."

Focused on Investment Performance

Moran Wealth focuses on superior investment performance, "which is critical to any investment plan," says Moran. "Even the best investment plans can fail if the investments do not meet or exceed expectations." The team's results have earned it national ratings from Thomson Reuters Lipper. Four times, Lipper has named Moran Wealth the #1 manager in different investment classifications. The team's conservative high dividend growth and millennium growth models have been named Best-in-Class by Lipper.

When Moran started in 1989, the industry press called Tom a pioneer; it was one of the first fee-based advisors in the country with a fiduciary relationship with clients through their advisory management portfolios. Today it is one of the largest groups, with the ability to service clients in all 50 states. Its team of 24 manages $3 billion in assets as of March 31, 2019.

And the Team is growing. Moran's son and daughter are part of that growth. "We're starting a dynasty," Moran jokes. But he has no plans to hand over the reins anytime soon. "I love coming to work every day and the years have flown by," he says. "Maybe I'll go 30 more!"

MORAN
WEALTH MANAGEMENT
Passionate • Personable • Performance Driven

5801 Pelican Bay Boulevard, Suite 110, Naples, FL 34108 | 239.920.4440
moranwm.com | Thomas.Moran@moranwm.com