Thomas M. Moran

Founder, Chief Executive Officer

Senior PIM Portfolio Manager

Growth and stability are the cornerstones of Tom Moran's success within his practice. As founder and CEO of Moran Wealth Management, he focuses intently on being a good financial steward for his clients and building a team of passionate, dedicated professionals to serve them. The group provides concierge-level service to high net worth and ultra-high net worth individuals and families, along with specialized financial services for corporations, executives, fiduciaries, and non-profit organizations.

Tom leads the team to improve the depth and breadth of personalized service offered to multiple generations of clients. In an industry rife with change and turnover, he sees inherent flaws in the way many practices are structured. Many firms and advisors lack continuity plans for unexpected events. Those structures are incongruent with clients seeking stability. Just as Moran was one of the early pioneers in offering managed investment portfolios for a fee, his approach to building a practice where employee commitment and loyalty are rewarded exemplifies his entrepreneurial spirit and innovative thought process. Many senior staff members became equity partners when he transitioned into the independent space in 2018. His unwavering commitment to developing a nurturing environment where partners and employees are fully invested in the longevity of the practice and success of the clients it serves is inspirational.

Congratulations Tom Moran

For being recognized again as one of The Naples 100

We are honored to support a leader so worthy of admiration and trust. Your vision for the future of Moran Wealth Management, and your commitment to improving the lives of everyone around you, gives each member of the team a meaningful purpose we happily share!

MORAN
WEALTH MANAGEMENT

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