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## ABOUT MOORECONSTANT

*In 2018, Jon Constant and Jake Moore formed the MooreConstant team to advise both individuals and business.*

Their primary focus is wealth management and comprehensive financial planning and provide advice in the following areas: retirement planning, investment management, education planning, tax-efficient investing, estate and wealth transfer planning, concentrated stock position management, risk management and insurance, business benefits, 401(k)s, retirement plan design, and business succession planning.



### **JONATHAN M. CONSTANT** *Financial Advisor*

Jon began his career in wealth management 15 years ago with American Express Financial Advisors and spent 12 years in various advisory firm leadership positions. Most recently, he served as the managing principal of a national independent broker dealer, covering the state of Georgia from 2014-2018. Jon holds the Chartered Retirement Planning Counselor designation through the College for Financial Planning and previously held leadership positions with financial services industry organizations, such as NAIFA.

Jon has been proud to call Atlanta home since 2005, and for the past 5 years, has resided in the Ansley Park neighborhood with his wife, daughter, and their two dogs. Jon met his wife, Sintra, while attending Bates College in Lewiston, ME, where they are both alums. They're now active in the Atlanta area Bates Club. They also are members of All Saints Episcopal church in Midtown Atlanta.

In his leisure time, Jon enjoys traveling with his family, playing tennis and golf, fly fishing, as well as several outdoor activities. He's an avid sports fan and can often be found with clients catching a game, playing a round of golf, or fishing.



### **JAKE MOORE** *Financial Advisor*

Jake is a proud alumni of the University of Georgia's Terry College of Business, where he received a BBA in Finance. He began his career in the wealth management business five years ago with the Atlanta office of Waddell & Reed, a national independent broker dealer. Jake has worked diligently over the past five years to build a practice focused on comprehensive planning for individuals and small businesses with an emphasis on elite client service. Jake holds a Chartered Retirement Planning Counselor designation from the College for Financial Planning as well as a Certified Financial Planner designation from the CFP Board.

Jake was born and raised in Albany, Ga and has been proud to call Atlanta home since 2013. In his leisure time Jake enjoys traveling with friends and family, water and snow skiing, tennis, golf, fishing, hunting and most outdoor activities. He also enjoys watching all sports and can often be found catching a game with his clients or inviting them to play a round of golf or go hunting.

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