OVER **$4 BILLION** IN ASSETS UNDER MANAGEMENT

Moran Wealth Management® is responsible for over $4 billion in assets under management (AUM, for families and institutional clients, as of May 31, 2022* as a result of utilizing over 30 different investment strategies. We focus on quantitative analysis and fundamental research in building diversified equity portfolios, to develop customized investment portfolios for exclusive use by our clients.

OUR SERVICES

Moran Wealth Management® is a full-service wealth advisory practice with a focus on outstanding, personalized client service. Our team can draw on a wide array of resources, products, and services to help individuals and businesses alike make sound investment decisions to achieve their financial goals.

Our investment philosophy centers around always doing what we believe is right for our clients. We believe in long-term relationships and aim to earn your continued trust by providing individual attention and highly-personalized service throughout your entire relationship with our firm.

As a team of multidisciplinary professionals, our practice services a diverse clientele; we work with young families seeking to build generational wealth, and we also work with family offices to collaborate with established clients' attorneys, accountants, trust and real estate professionals to integrate management of their investment portfolios with their current team. Our high-net-worth investors and corporate clients trust the Moran Wealth team to help them make sound investment decisions in an effort to achieve their short- and long-term financial goals to grow and protect their assets.

Contact us at **239.920.4440** or visit **MoranWM.com** today to schedule a complimentary consultation.

MORAN
WEALTH MANAGEMENT®

5801 Pelican Bay Boulevard | Suite 110 | Naples, FL 34108
239.920.4440 | MoranWM.com

Thomas M. Moran AIF® | Chairman | CEO | CIO

RECOGNIZED AMONG

TOP 1200 BARRON'S Financial Advisors 2022

TOP 100 BARRON'S Independent Advisors 2021

TOP 100 BARRON'S Financial Advisors 2022

TOP 100 BARRON'S Private Wealth Teams 2022

BARRON'S Hall of Fame Advisor

Forbes BEST-IN-STATE WEALTH ADVISORS 2022 SHOOK RESEARCH

Forbes TOP 250 WEALTH ADVISORS 2021 SHOOK RESEARCH

***Barron's* Top 1,000/1,200 Advisors**, **Top 100 Financial Advisors**, and **Top 100 Independent Advisors** rankings are based on assets under management, revenue generated for the advisors' firms, and the quality of the advisors' practices. Investment performance isn't an explicit factor because clients have varied goals and risk tolerances.

To be named a ***Barron's* Hall of Fame Advisor** the advisor has to have been named by *Barron's* for the last ten years consecutively in any of their rankings. In Tom Moran's case from 2010-2021 he was named to Barron's Top 100 Financial Advisors ranking.

***Barron's* Top 50/100 Private Wealth Teams** are evaluated on a range of factors for the Financial Advisor and their team, who specialize in serving individuals and families. Factors included in the rankings include their size and shape, the regulatory records and credentials of their members, and the resources they have at their disposal to serve their client bases.

***Forbes* Best in State and Top 250 Wealth Advisors**: Ranking algorithm is based on industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC, which does not receive compensation from the advisors or their firms in exchange for

* Assets were custodied at Wells Fargo Advisors Financial Network as of 5/31/22, which represents the last month-end AUM prior to assets transferring to Pershing a wholly owned subsidiary of BNY Mellon Bank. Services were provided while the team was registered representatives and/or investment adviser representatives at Wells Fargo Advisors Financial Network as of 5/31/22.

** The Barron's awards were achieved while Tom Moran and the team were associated with Wells Fargo Advisors Financial Network.

MORAN
WEALTH MANAGEMENT®

EXTRAORDINARY ATTENTION
PROPRIETARY **STRATEGIES**
COMPREHENSIVE CAPABILITIES
YOUR VISION OUR SOLUTIONS

MORAN
WEALTH MANAGEMENT®

Moran Wealth Management® was founded in March of 1990 by **Thomas M. Moran AIF®**, Chairman, CEO and CIO; and Earl Sistrunk, CFA®, Senior Portfolio Manager. From the beginning, we have strived to add value to our clients' portfolios by capitalizing on our investment experience. As a result, you only receive personalized investment attention.

Through Moran Wealth, you will be investing with BNY Melon | Pershing, one of the nation's largest retail brokerage businesses. Investors have been entrusting their money to Moran Wealth for over 30 years and continues today as we manage the assets of both individual and institutional clients worldwide.

Aaron Simpson CFP®, CLU®, ChFC®, RICP®, Senior Vice President I Margaret F. Karr, Vice President
Charles E. Chesebrough, Jr. CFA®, Senior Vice President I Michael Mongin, Senior Vice President
Kylen Moran, Chief Marketing Officer I Thomas M. Moran AIF®, Chairman, CEO and CIO I Donald Drury, President
Julie Rich, Senior Vice President I Corey Grant CFP®, ChFC®, Vice President I Ryan Frank CFP®, ChFC®, Vice President

PUT OUR **EXTRAORDINARY TEAM** TO WORK FOR YOU.

Moran Wealth professional staff includes three CERTIFIED FINANCIAL PLANNER™ (CFP) Professionals, three Chartered Financial Analyst® (CFA) charterholders, three Master of Business Administration (MBA) degree holders, three Chartered Retirement Planning Counselor® (CRPC), one Certificate in Quantitative Finance Holder (QCF), and a Certificate in Investment Performance Measurement® (CIPM) holder. All totaled, we have 36 people dedicated specifically to serving existing clients. We're here with attentive, professional client service to answer your questions and make sure you're informed every step of the way.

By utilizing a comprehensive team approach, Moran Wealth Management provides investment management services to a select group of clients. We focus on serving successful individuals and their families, as well as providing specialized financial services for corporations, executives, fiduciaries, and non-profit organizations.

Moran Wealth takes a very disciplined and personal approach to managing your money. We use our combined team knowledge and experience in this discretionary relationship to help you achieve the long-term goals you've set for your portfolio.

OUR PROCESS

Moran Wealth's financial advisors build portfolios by first identifying the client's unique investment style based on a variety of factors, such as income, risk tolerance, diversification, investment and financial goals, and preferred market exposure. This helps in the selection of a suitable strategy for each client, allowing for a personalized approach to asset allocation and securities selection that meets the desired needs and yields the short-and-long-term results.

Investment Management & Planning
Estate Planning & Asset Protection Strategies
Direct Access to Dedicated Support

OUR STRATEGIES

The customized investment portfolios we construct utilize portfolio styles developed internally by the Portfolio Manager of the Moran Wealth Management team for exclusive use by our clients. We currently utilize more than 50 variables from 200 different research firms to arrive at our recommendations. Our proprietary processes are designed to benefit clients by bringing together our collective experience in diverse markets, such as macro strategy, international strategy, equities (large-, mid- and small- capitalization), closed-end funds/exchange—traded tracking products (CEFs/ETPs), fixed income securities (investment-grade, high-yield and municipal securities) and market analysis.

Your portfolio is designed according to your unique financial goals, taking a disciplined investment approach in pursuing your objectives and working with you to establish the appropriate asset allocation that seeks to provide maximum expected performance in accordance with your risk tolerance and investment goals.