



Moore & Associates

An Ameriprise Private Wealth Advisory Practice

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- Began with Ameriprise Financial Services (formerly American Express Financial Advisors) February **1989**
- CERTIFIED FINANCIAL PLANNER[™] practitioner
- Throughout his career with Ameriprise Financial Services he has been awarded:
 - Master Advisor: **1991**
 - Advanced Advisor Group, Gold Team: **1992**
 - Advanced Advisor Group, Platinum Team: **1996**
 - Circle of Success, Platinum Circle: **1997 – Current**
 - President's Advisory Council: **1996 – 2006**
 - Diamond Ring Club: **2000**
 - #1 Advisor in the country with the highest scorecard percentage ever achieved by an advisor: **2003**
 - President's Recognition Award: **2004**
 - Chairman's Advisory Council: **2006 – Current**
 - Hall of Fame: **2006**
 - Private Wealth Advisor: **2007**
 - Lifetime Achievement Award: **2009**
 - Accredited Portfolio Management AdvisorSM: **2011**
- Worth Magazine – Top 250 Advisors in the country – **1999, 2000, 2001 and 2002** (as of 2003, it was changed to the Robb Report top 100).
- Who's Who of Executives, Professionals and Entrepreneurs – 2008, 2009, 2010
- Host of "**Money Talk**" every Sunday morning from 8:30 a.m. – 10:00 a.m. on News Talk 1190 WOWO radio in addition to WOWO's "**Money Minute**" every weekday at 7:20am and 8:20am
- Specializations include sound financial planning solutions for:
 - Individual Investors
 - Business Owners
 - Executives
 - Corporations
 - Affluent Investors
- Areas of focus include personal financial planning for:
 - Estate Planning Strategies
 - Tax Management Strategies
 - Retirement
 - Small Businesses
 - Wealth Preservation Strategies
 - Executive Compensation and Benefit Strategies
 - Charitable Giving Strategies
 - Protection Planning / Family Security



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