

Two Generations. One Unwavering Commitment.

Moore's Wealth Management, LLC

“It’s always been our dream to have a family business our children could grow into,” says Scott Moore, founder of Moore’s Wealth Management. “What we didn’t realize is that it would be the answer to our clients’ dreams as well.”

The financial services firm offers retirement income planning for retirees and near-term retirees. Moore and his team specialize in conservative investments with nonconservative 6 or 7 percent returns over 5 to 15 years. The firm was founded by Moore and his wife, Carla, in 2009. Since that time, the firm has experienced growth every year, and three of the Moores’ sons have joined the firm as financial advisors. Their daughter, who is still in college, also works there part time. To take the idea of a family business even further, the three employees who don’t share a last name with Moore are a family in their own right – a husband and wife and their daughter-in-law.

“We treat everyone in the firm like family because they are,” says Moore, “and that extends to our clients as well. We genuinely feel they are part of our extended family and we treat them as such.”

Moore has discovered what clients appreciate most about the family aspect of Moore’s



“We help our clients protect their financial future through a fiduciary standard of care that puts their interests first.”

—Scott Moore
Founder, Moore’s Wealth Management

Wealth Management is the stability it brings to their finances. “Many clients have said our family structure was the key in their decision to hire us as their financial advisors,” he says. “They tell us it gives them peace of mind to know this business has a built-in line of succession that will last beyond my retirement. The business will be around to guide them through their own retirement years and even those of their children.”

Required by Law to Work in Your Best Interests

When Moore started his financial career 22 years ago, he worked under a standard broker model. This only requires brokers to put clients into portfolios that generally fit their risk tolerance. Once that standard is met, however, brokers can choose investments with high fees, that pay higher commissions or that earn them points with the brokerage house. When Moore founded his own firm, he left that model behind and chose instead to become an independent fiduciary advisor. This means he is required, by law, to offer only investments that are wholly in the client’s best interest.

Moore’s firm takes this commitment very seriously. All of its financial advisors have taken on this obligation by becoming fiduciary advisors themselves. And the firm has even taken strides to ensure the business, as a whole, acts in its clients’ best interests. It established an advisory council of 10-12 clients who rotate on and off the committee every year. “Clients have a genuine interest in the success of our company, so we bounce every idea off of them before it’s implemented,” says Moore. “It keeps our focus where it should be, on what our clients want from their financial advisors.”

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