Clarity Wealth promotes Financial Professional to Leadership Team

Clarity Wealth continues to strengthen its leadership team with the transition of Evan Jones, CFP to head of investment management.

As the principal for one of five leadership functions, Jones will oversee management of discretionary portfolios, which collectively have over $1 billion in assets (3/31/24). He was an integral part of creating the system used in managing these portfolios. He'll also work with outside money managers and investment platforms which amount to over $2 billion more in client assets (3/31/24).

Jones is a financial services professional with more than 19 years of experience and has been a senior vice president – financial advisor/wealth advisor for the past year. His responsibilities include serving as a key point of contact for clients, handling investment planning and estate settlement, and maintaining the internal portfolio management systems.

The leadership team at Clarity Wealth utilizes the Entrepreneurial Operating System (EOS). Part of the structure of EOS is defined leadership roles in each of the team's major functions. Those leadership roles are client advice, client service, business development, finance, and investment management.

For more information about Clarity Wealth and its comprehensive financial services, please visit clarity-wealth.com or contact info@clarity-wealth.com.

About Clarity Wealth

Clarity Wealth has built a heritage of managing the assets of affluent families for as many as four generations of wealth. As a family of 47 financial professionals, Clarity Wealth organizes financial matters into a comprehensive wealth management plan that allows families to think more creatively and confidently about their future while providing financial clarity into their wealth management needs. Clarity Wealth has offices in Naples and Fort Myers, Florida, and Pittsburgh, Pennsylvania. With clarity comes confidence. For more information, visit clarity-wealth.com.

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For more than 20 years, Wells Fargo Advisors Financial Network, the independent brokerage arm of Wells Fargo & Company, has simplified independence by partnering with successful financial advisors and fostering a mutual passion for doing what's right for clients.