

Bio

As a wealth advisor, Matt is responsible for delivering customized financial planning with an emphasis on the areas of risk management, investing and wealth transfer. He constructs a team of UMB advisors around the specific needs of his clients to deliver holistic financial solutions. Matt joined UMB in 2004 as a financial advisor. Prior to joining UMB he was employed for six years by Prudential Financial in Phoenix, Arizona as a financial planner, serving business owners and executives throughout the southwest. Matt earned a bachelor's degree in economics from Arizona State University in Tempe, Arizona. He obtained his CERTIFIED FINANCIAL PLANNER designation in 2008. He is a member of Financial Planning Association (FPA), and the Planned Giving Roundtable of Arizona. Matt is on the Board of Directors at Ballet Arizona, and is a member of the Planned Giving Committees at Desert Botanical Gardens and Ballet Arizona. He is a member of the Five Arts Circle and Shepherd of the Desert Lutheran Church. Matt also enjoys volunteering with Boy Scout Troop 131 of Scottsdale.