

Meet

# Jonathan DeMoss



## Specializations:

- Investment Portfolio and 401(k) Advice & Monitoring
- Retirement Planning
- Tax Planning
- College Planning
- Estate Planning
- Social Security
- Medicare
- Insurance & Risk Management

## Qualifications:

- CFA (Chartered Financial Analyst)
- BA in Business/Economics from Wheaton College

## Jonathan DeMoss, CFA

Jonathan is committed to helping individuals and families feel confident about their financial well-being. Taking a holistic approach, he educates and guides clients on all of life's financial decisions involving investments, retirement, taxes, insurance, estate planning and more. His ultimate objective is to help people achieve their financial goals and retirement dreams.

Prior to joining Advance Capital, Jonathan served as the Northeast Advisor Consultant for Innovator ETFs, where he helped manage and grow account assets to more than \$400 million. Before that, he held a Senior ETF Advisor Consultant position for PowerShares.

Jonathan earned a Bachelor of Arts degree in business and economics from Wheaton College. He is a Chartered Financial Analyst.

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# Jonathan DeMoss (continued)

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## What influenced your decision to join ACM?

In my prior job, I had the opportunity to consult with financial advisers from all over the country. From that experience, I learned the importance of working for a firm that puts the client's best interest first and provides high-quality but low-cost services. What attracted me specifically to Advance Capital is the fact our firm is founded on that very idea.

## What is your favorite piece of advice?

One piece of advice that has always stuck with me is from my head basketball coach at Wheaton College. During six a.m. sprints and drills, he would always remind us that if we want to win, we must always do the right thing and never cut corners. If you cut corners today, you will eventually cut corners later in life. These principles of discipline and integrity are the foundation of what I do today in helping people achieve their financial goals.

## What do you find most rewarding about your work?

The most rewarding thing about what I do is the opportunity to help people create a plan to achieve some of their biggest goals in life and then guide them along the way. Finances are such a critical component of our lives. Helping people not only navigate the financial challenges but also find what matters most in life is truly fulfilling.

## What does it take to be successful in your role?

Success in my role comes down to a timeless idea. If you treat others the way you would like to be treated and put their needs before your own, good things tend to happen. I find that being genuinely interested in others goes a long way in developing trust and a successful partnership, for both client and adviser.

Investment advisory services are provided by Advance Capital Management, Inc.

Investments are not insured, and may lose money. Client should be prepared to bear the risks associated with investing.

## Fun Fact!

Jonathan personally knows what it takes for someone to create an enduring legacy. His grandfather, Bob DeMoss, played college and professional football, and was the head football coach at Purdue University.