Jeff Monson

Senior Financial Advisor
Senior Vice President-Investments

Jeff Monson, CFP®
PIM Portfolio Manager

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Client Associate:
Kayla Payne 435-674-8064

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Professional Experience

- Jeff Monson joined Wells Fargo Advisors in 2007.
- Prior to joining Wells Fargo Advisors Jeff was an advanced estate and business planning specialist
- Jeff has been in the financial services industry for over 15 years.

Professional Designations

- Certified Financial Planner, CFP®
- Chartered Financial Consultant, ChFC
- Chartered Life Underwriter, CLU

Education

- Graduated with Honors from Utah State University in Accounting and Economics

Professional Associations

- Southern Utah Estate Planning Council
- Professional Advisory Council IHC Foundation
- Dixie State University Planned Giving Advisory Council

Business Focus

Jeff focuses on the core areas of Investment Planning for families and business owners.

1. Investment Planning
2. Retirement Income Planning
3. Estate Planning Strategies
4. Risk Management
5. Tax-efficient Investment Strategies
6. Planning needs for Business owners

Website address:

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