Jonathan Ashby

Senior Wealth Advisor

Senior wealth advisor with 10 years serving business owners and retirees, now leading 70 relationships with $420M in assets in Scottsdale. Specializes in financial planning for business exits, estate planning and tax-aware investment strategies. CFP and CPWA professional who brings attorneys, CPAs and trust officers together for each family.

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Experience

Senior Wealth Advisor

01/2020 - Present

Camelback Family Wealth

Scottsdale, AZ

Multi-family office with $3.2B in assets serving 220 families.

- Lead relationship management for **70** families with $420M in assets, including 12 with business sales in progress.
- Structure business exit plans with tax planning, installment sales and charitable trusts, saving one client $2.1M in taxes.
- Set investment strategies with the CIO team for portfolios from $2M to $40M, including private equity allocations.
- Manage 2 wealth advisors and 3 associates and run an onboarding checklist that cut account setup time 40%.

Wealth Advisor

06/2016 - 12/2019

Sonoran Capital Partners

Phoenix, AZ

Wealth management firm serving physicians, dentists and executives across Phoenix.

- Grew client assets from $90M to $230M in 3.5 years through CPA and physician group referrals and seminars.
- Wrote estate planning summaries and flowcharts for 60 families ahead of meetings with their estate attorneys.
- Built Excel cash flow models for retirement and practice sale decisions, used in 150 planning meetings.
- Maintained 98% client retention while doubling the number of households served from 45 to 90 families.

Certificates

Certified Financial Planner (CFP)

04/2019

CFP Board

Certified Private Wealth Advisor (CPWA)

10/2022

Investments & Wealth Institute

Series 65 License

08/2016

FINRA

Skills

- Financial Planning
- Relationship Management
- Estate Planning
- Investment Strategies
- Tax Planning
- Private Equity
- Excel
- Leadership
- Analytical Skills

Education

Bachelor of Science in Business Administration

05/2016

University of Arizona

Tucson, AZ

Finance