Paces Ferry
WEALTH ADVISORS

A shared journey.

Start a Conversation

Get to Know Paces Ferry Wealth Advisors

02:14

Planning. Preparation. Execution.

Getting started

Based on your values and goals, we work with you to chart a path for success. Together we create an action plan that works with your life and how you see success. Learn more about our process.

Down the path

Once we set the plan in motion, we check in regularly to ensure the path is still the right course of action. Along the way, we're setting in place action items to keep things moving.

Achieving your goals

We're always working toward events in your life—goals are usually aligned with desired milestones. We relish in seeing our clients meet goals and celebrate their achievements.

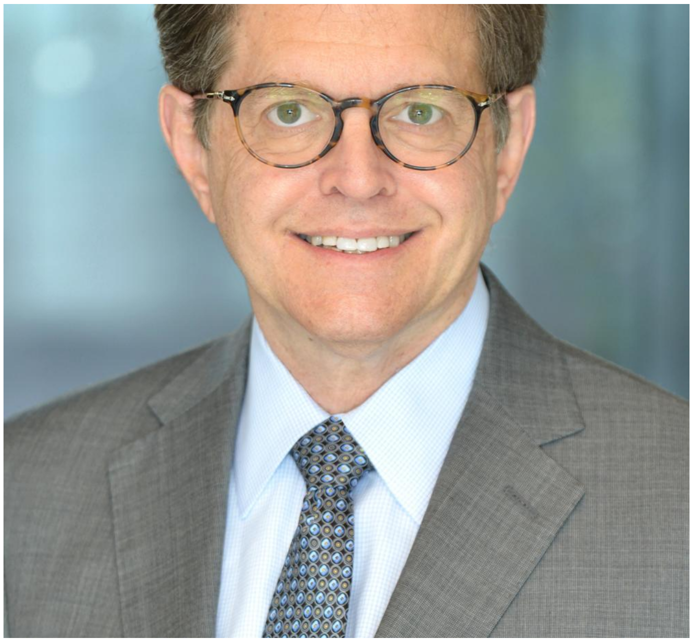
Wealth advisors serving Atlanta, Georgia

Your Team

Our Mission

Having the right partner to help plan and implement your financial strategy is crucial. Our combined expertise, perspective and experience to attain your goals and future endeavors.

As we get to know our clients, we present questions that get them thinking beyond typical financial advisor rhetoric. While retirement planning is critical, we may ask about other things that are important to you — college savings, tax implications on real estate transactions, wealth transfer, or estate planning down to wills and health care directives. Ultimately, we want to be looking at your complete picture. That’s when we can help best.



Jeff Diamond, AIF®

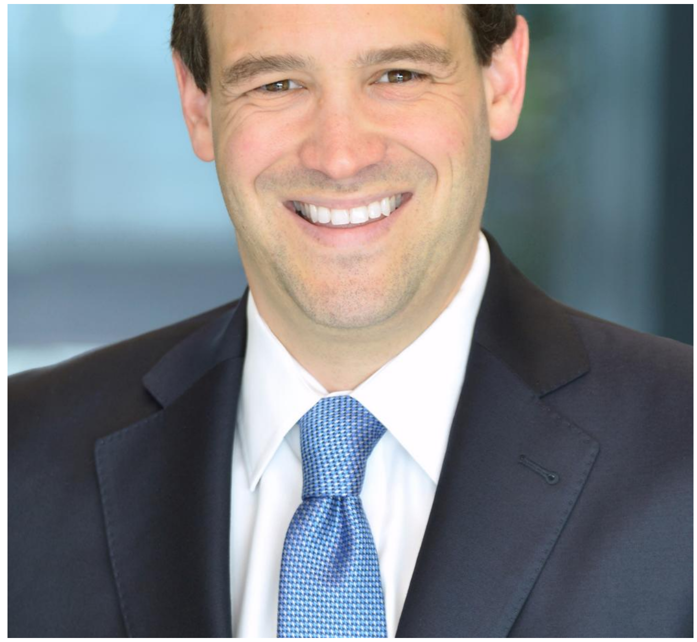
WEALTH ADVISOR & FOUNDER

An Atlanta native, Jeff is an avid runner and, in his free time likes to read, play guitar, travel and hit the open road on his Harley.

He is a co-founder and wealth advisor at Paces Ferry. Jeff has over three decades of financial services industry experience, having started his career in 1985 at PaineWebber. Most recently, Jeff served as managing director at J.P. Morgan Securities, a wealth management division of J.P. Morgan, and a partner in the Diamond Morris Group.

Throughout his career, Jeff has served on many honorary councils, including receiving the honor of being named a Five Star Wealth Manager by *Atlanta* Magazine.

Jeff is an honors graduate of the University of Georgia's Terry College of Business and is a



Zachary Morris, CFP®

WEALTH ADVISOR & FOUNDER

Having traveled to over 35 countries, Zach is a believer in Ralph Waldo Emerson's statement that *Life is about the journey, not the destination.* Being a CERTIFIED FINANCIAL PLANNER™ provides Zach the opportunity to help clients define and realize their journey, and co-founding Paces Ferry Wealth Advisors, an independent firm, allows the freedom to define the client experience along the way.

Previously, Zach was a partner in The Diamond Morris Group and a Financial Advisor with J.P. Morgan Securities, a wealth management division of J.P. Morgan.

Before becoming a Financial Advisor, Zach started as an Associate with the firm in 2011, where he developed skills for building lasting relationships with clients. Later, Zach responsibilities to help clients on a deeper level. Additionally, he has been very involved with several charitable organizations.

Jeff is married with two daughters. When he's not playing his guitar or reading a good book, he loves spending time with his family.

Zach supports a number of organizations including Alzheimer’s Association, Georgia Chapter, The Shepherd Center, Crohn's & Colitis Foundation of America, and NewStory.

Zach received a B.S. in finance, with a minor in economics, from Elon University in North Carolina. He was a member of The Kappa Alpha Order and has served on the board of the Elon Alumni Association's Atlanta chapter. Zach speaks Spanish and is an Atlanta native. He and his wife live in West Midtown’s Underwood Hills neighborhood and his parents and two of his three sisters and their families live nearby. In his spare time, Zach golfs, plays tennis, rides his mountain bike and travels.

Connor Jabs

SENIOR CLIENT ASSOCIATE

Connor is an Atlanta transplant, originally from Washington, D.C. He joins the Paces Ferry team as a Senior Client Associate. His role is client-centric: ensure an excellent experience for existing clients and, also, cultivate new client relationships.

Previously, Connor worked as a Fixed Income Analyst and Trader at a boutique financial services firm in Atlanta. He graduated from University of Georgia's Terry College of Business with a Bachelor's in Business Administration in finance. Additionally, during his college years, Connor spent a semester at Vienna University of Economics and Business in Austria.

As part of his personal celebration of the Washington Capitals' 2018 Stanley Cup victory, Connor is now the proud owner of a reading. He’s a passionate fan of the University of Georgia Dawgs and all Washington, D.C. pro sports teams.

We'll Help You Stay the Course.

Get Started Today

Providing precisely what is needed.

We start with your goals and work backwards to determine the appropriate amount of risk necessary to help you reach those goals.

Your wealth plan is a calculated, comprehensive approach to managing risk, assets and your overall wealth so that we can best meet your individual goals. The plan will likely include a combination of cash management advice, taxation strategies, estate structure, savings and investment strategy — all designed specifically for you.

Independence is the only way.

Being independent creates an elevated client experience. Through independence, we can continue to enhance the wealth management practices we have adopted throughout the years with the goal of meeting client needs. It also means we pair these practices with impartial investment research, best-in-class technology and a team of third party resources specifically selected to provide exceptional service for our current and future clients.

We'll Help You Stay the Course.

Financial planning services in Atlanta, Georgia

Creating your Paces Ferry Wealth plan and personalized investment strategy overseen by professionals enables you to make better, more informed decisions with increased confidence.

Your wealth plan is a calculated, comprehensive approach to managing risk, assets and your overall wealth so that we can best meet your individual goals. The plan will likely include cash management advice, taxation strategies, an estate structure, savings and investment strategy, all designed specifically for you.

Comprehensive financial services to fit you.

SETTING GOALS THEN EXECUTING THE RIGHT PLAN

Planning is critical in setting and then realizing goals for you and your family. Having a detailed and thorough plan in place now will involve you in the execution along the way and also make potentially challenging future events easier to navigate for loved ones. We will work closely with your estate attorney to ensure your plans, goals and wishes are properly documented then implemented.

MEETING RETIREMENT GOALS

Retirement should be an amazing event you look forward to. Having the foresight to plan with you, we enable you take control of your retirement journey now. During the financial planning process, we can discuss how you envision your retired life and chart a strategy path to get you there.

SAVING FOR EDUCATION

Start saving now as the costs of college education are constantly on the rise! Key to preparing for your child’s future is saving. We will help you navigate the opportunities, choose the right one for you and ensure we're using the proper investment vehicles.

ASSESSING PROPER INSURANCE COVERAGE

Being prepared for the unknown shouldn't be a burden. We'll review your current insurance plan to determine if your coverage is sufficient to enabling your established financial goals.

Connect With Us!

Your local financial advisor across Georgia.

We want to hear from you. To see if we're a good fit, we'd like to know more about what you're looking for in an advisor.

Fill out the following short form and we'll make time to sit down and talk about your unique situation.

NAME

EMAIL

PHONE

MESSAGE

LOCATION

2849 Paces Ferry Road SE, Suite 660

Atlanta, GA 30339

OFFICE HOURS

Monday - Friday

9AM - 6PM and by appointment

CONTACT

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Account Access

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