



**SOLID
RELATIONSHIPS**

Areas of Special Emphasis

Estate Planning, Trusts & Foundations, Wealth Management

Education

Bachelor of Science in Mathematics
The University of Georgia, Athens, GA

AARON NELSON

Client Consultant

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Aaron Nelson has been with Warren Averett since 2015, and serves as a Client Consultant for the Firm's Emerant Wealth Division. His primary responsibilities include developing client relationships, assisting with clients' comprehensive financial planning and managing investment portfolios for investors. Aaron has over 20 years of experience as an investment consultant and has previously worked for Morgan Keegan and AMN Investments. Aaron and his wife reside in Birmingham and have three children, two of which are twins.

Community Involvement

- Birmingham Sunrise Rotary
- Birmingham Jewish Foundation Board
- Temple Emanu-El Brotherhood Board
- Paul Harris Fellow

Ask Me About

- Positioning your investment portfolio to align with your needs and risk objectives
- Why it is important to have a well-crafted wealth management plan before retiring
- How you can save money without giving up returns simply by choosing the right investment vehicles
- My time living in Israel
- Being a Georgia Bulldog living in Alabama
- Owning my own business