



*Managing Partner*

### Practice Focus

- Wealth Management Services
- Estate Planning
- Professional Money Management
- Business Ownership Strategies
- Retirement Planning
- Tax Reduction Strategies
- Asset Protection

### Certification / Education

- CERTIFIED FINANCIAL PLANNER™ practitioner (CFP®)
- Bachelors of Science degree, Business Management, St. John's University

### Affiliations

- Registered Representative, Securities America, Inc.
- Member, Financial Planning Association
- Member, National Football League Financial Advisors Program (NFL-PA)
- Member, Lake Norman Chamber of Commerce

### Media Resource

- Wall Street Journal
- Journal of Financial Planning
- Chicago Tribune
- Charlotte Business Journal

## Jeffrey A. Carbone, CFP®

Jeff Carbone is co-founder of Cornerstone Financial Partners, a financial services firm in Charlotte, North Carolina. He provides professional money management services for athletes and entertainers, as well as comprehensive financial planning strategies through Securities America Advisors, for business owners and executives.

Jeff is dedicated to providing uncompromising attention to detail as he reviews his client's current financial situation, risk tolerance and personal priorities. Only then does he conduct an in-depth analysis of world markets and suggest an appropriate investment strategy. He believes that the key to successful investment management is achieving the optimal balance between enhancing returns and managing risk; between wealth preservation and portfolio growth.

Jeff holds a Bachelor of Science degree in Business Management from St. John's University. He successfully completed the demanding requirements to become a CERTIFIED FINANCIAL PLANNER™ professional through the Certified Financial Planner Board of Standards, Inc. Earning and maintaining the right to use the CFP® mark means that Jeff has passed a rigorous certification examination and continues to meet the CFP Board of Standard's specific education, experience and ethical requirements.

Jeff resides in Davidson where he balances work with family time spent with his wife Shannon and their daughter. An ardent believer in making a lasting contribution to his community, Jeff and his partners are consistent supporters of the local Rotary Club, Special Olympics, youth sports, as well as their local schools and faith communities.

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