



Matthew L. Montgomery, ChFC

FINANCIAL ADVISOR & OWNER

Montgomery Financial Designs | MarketShare Financial

ChFC

RIA

Series 63

37+ Years

ABOUT

With more than 37 years of experience in financial services, Matthew Montgomery has built his practice around one straightforward conviction: clients deserve a highly personalized, partnership-driven approach to their financial lives. As a Chartered Financial Consultant (ChFC) and Registered Investment Advisor, Matt founded Montgomery Financial Designs in Jacksonville, Texas, serving a diverse clientele that spans entrepreneurs, peak-career professionals, pre-retirees, retirees, and high-net-worth individuals.

Matt's philosophy centers on open communication and long-term relationships. He builds individualized financial models — assessing risk tolerance, identifying blind spots, setting clear goals, and implementing disciplined strategies — so that clients can relax and stop worrying about their money. His investment approach emphasizes diversification and capital preservation alongside growth, adapting to changing market conditions.

CREDENTIALS & EDUCATION

Chartered Financial Consultant (ChFC)

The American College of Financial Services

Texas A&M University

Bachelor's Degree

Licenses & Registration

Series 63 • Registered Investment Advisor

Insurance Broker / Agent

Registered in Texas; additional states under applicable exemptions

CONTACT

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Client Profiles Served

Entrepreneurs • Peak-Career Professionals

Pre-Retirees & Retirees • High-Net-Worth Individuals

Families • Small Business Owners

AREAS OF FOCUS

Wealth Management

Retirement Solutions

Portfolio Construction & Risk Mgmt

Estate Strategies

Financial Planning Models

Small Business Planning