

# Wachovia Wealth Management: Our Team

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## **Joshua D. Jordan, CPA, MBA**

*Relationship Manager, Vice President – Palm Beach Gardens*

As a Relationship Manager within Wachovia Wealth Management, Joshua works closely with a team of experienced specialists to provide affluent families with financial planning, trust and estate services, customized credit solutions, investment advisor services, tax planning, unique asset management, and closely-held business strategies.

Prior to joining Wachovia, Joshua was a Senior Consultant in the Family Wealth Planning Group of Grant Thornton, LLP. With a team comprised solely of CPA's and attorneys, Joshua served the needs of high net worth individuals and closely-held business owners. With exposure to families whose wealth ranges from \$5 million to \$1.5 billion, he has experience and success in handling the complex issues that arise in the areas of estate planning, individual taxation, gift taxation, and business succession planning.

Joshua graduated with Honors from Palm Beach Atlantic University and was distinguished by the faculty in receiving The Most Outstanding Graduate Award. He holds a Bachelor of Science degree in Finance and Accounting and a Master of Business Administration degree with a concentration in Finance.

