



Benjamin W. Jones
CFP® / AIF®
Principal, President,
Chief Investment Officer
CERTIFIED FINANCIAL PLANNER™

Ben has been managing assets for private individuals, families, and charitable organizations since joining Allegiant Private Advisors in 2005. In his role as President, he oversees the daily workflow and management of the customized wealth management firm. As Chief Investment Officer of Allegiant Private Advisors, Ben leads the firm's Investment Committee, is responsible for establishing the firm's overall investment strategy, security selection, portfolio management, and oversees research activities. He is active in the community through local non-profit organizations and professional associations including the Lakewood Ranch Business Alliance, Young Leaders Alliance, the Greater Sarasota Chamber of Commerce and Forty Carrots Family Center. Ben is an alumnus of Leadership Sarasota, was named to the prestigious 40 Under 40** list by the Gulf Coast Business Review in 2009, and recognized in Forbes' Top 1,000 Next-Generation Wealth Advisors List** in 2018 as well as Forbes' Best-In-State Next Generation Wealth Advisors in 2019*** and 2020.**** Ben graduated from Bates College with a dual degree in Economics and East Asian Studies. He has earned his CERTIFIED FINANCIAL PLANNER™ certification, as well as the Accredited Investment Fiduciary® designation.

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Advisory Services offered through Allegiant Private Advisors, LLC, a Registered Investment Adviser

*The Gulf Coast Business Review 40 Under 40 List recognizes young leaders who have distinguished themselves in their professions and communities through economic, civic and charitable contributions. This award is not specific to financial services and does not imply an endorsement, recommendation, or otherwise reflect the performance of the advisor or any account.

**The 2018 ranking of Forbes' Top 1,000 Next Generation Wealth Advisors(1) recognizes advisors born in 1980 or later with a minimum of four years of experience. Advisors were rated based on a proprietary algorithm of qualitative and quantitative criteria: assets under management, revenues generated for their firms, client retention, industry experience, credentials, and compliance records. SHOOK Research also employs an opinion-based weighting system that prioritizes its preferred "best practices," which include business models, activities, processes, and structure. Overall, 5,832 advisors were considered, and 1,000 (17 percent of candidates) were recognized. Click [<https://www.forbes.com/sites/rjshook/2018/07/25/methodology-forbes-top-1000-next-gen-wealth-advisors/>] for the full methodology(2) that Forbes developed in partnership with SHOOK Research. 1) This recognition and the due-diligence process conducted are not indicative of the advisor's future performance. Your experience may vary. You are encouraged to conduct your own research to determine if the advisor is right for you. (2) Portfolio performance is not a criterion due to varying client objectives and lack of audited data. SHOOK does not receive a fee in exchange for rankings

***The 2019 ranking of Forbes' Best-In-State Next Generation Wealth Advisors(1) recognizes advisors born in 1980 or later with a minimum of four years of experience. Advisors were rated on a proprietary algorithm of qualitative and quantitative criteria: assets under management, revenues generated for their firms, client retention, industry experience, credentials, and compliance records. SHOOK Research also employs an opinion-based weighting system that prioritizes its preferred "best practices," which include business models, activities, processes, and structure. Overall, 6,389 advisors were considered, and 1,495 (23 percent of candidates) were recognized. Please visit the Forbes website for the full methodology (2) that Forbes developed in partnership with SHOOK Research. 1) This recognition and the due-diligence process conducted are not indicative of the advisor's future performance. Your experience may vary. You are encouraged to conduct your own research to determine if the advisor is right for you. 2) Portfolio performance is not a criterion due to varying client objectives and lack of audited data. SHOOK does not receive a fee in exchange for rankings.

****The 2020 ranking of Forbes' Best-In-State Next-Gen Wealth Advisors' recognizes advisors born in 1981 or later with a minimum of four years of experience. Advisors were rated based on a proprietary algorithm of qualitative and quantitative criteria: assets under management, revenues generated for their firm, client retention, industry experience, credentials, and compliance records. SHOOK Research also employs an opinion-based weighting system that prioritizes its preferred "best practices," which include business models, activities, processes, and structure. Overall, 3,480 advisors were considered, and 500 (14.4 percent of candidates) were recognized. Click here for the full methodology² Forbes developed in partnership with SHOOK Research. ¹This recognition and the due-diligence process conducted are not indicative of the advisor's future performance. Your experience may vary. You are encouraged to conduct your own research to determine if the advisor is right for you. ²Portfolio performance is not a criterion due to varying client objectives and lack of audited data. SHOOK does not receive a fee in exchange for rankings.