
Matthew Mozer, CFP®

Senior Wealth Strategist, Executive Director
Northeast Division, New Jersey Market



Matt is a senior wealth strategist with Wells Fargo Bank's Wealth & Investment Management located in Summit, New Jersey with more than 15 years of experience in financial services. Matt is part of a national team that works locally with ultra-high net worth clients collaborating with their advisors to review, develop, and consult on wealth transfer plans including legacy, philanthropic, business succession, and estates. Specifically, he works with advisors and their clients to gain a deeper understanding of each client's goals and objectives, review and discuss their current plan and identify additional strategies or modifications that could enhance the likelihood of meeting the client's goals.

Matt earned his bachelor's degree in Economics and Business from Lafayette College and his master's degree in Taxation from Villanova University. Matt holds the CERTIFIED FINANCIAL PLANNER™ designation.

Matt is an active member of the Estate Planning Council of Northern New Jersey.

Matt and his wife Marisa have four boys – Liam, Charlie, George and Thomas. In his free time, Matt enjoys being active outdoors, playing with his children and golfing with friends.

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