

ANNA M. JONES

Anna Jones is a Shareholder and Principal of Patriot Wealth Management, Inc., a Registered Investment Advisor. She has over 16 years of experience in the financial planning and investment management industry. Anna's focus has been on providing comprehensive financial advisory services to high net-worth individuals and their families including a large number of corporate executives. Anna's planning background includes extensive experience in financial and estate planning, income tax compliance, stock option analysis, cash flow management and contingency planning. Additionally, she has been heavily involved with the investment management process for each of her clients, including asset allocation planning and implementation.

Anna received her Bachelor's degree in Business with a concentration in Accounting from Trinity University in San Antonio. She is a CERTIFIED FINANCIAL PLANNER™ professional and a NAPFA Registered Financial Advisor. Anna is a member of the Financial Planning Association (FPA) of Houston, as well as a member of The National Association of Personal Financial Advisors (NAPFA). She is also an active member of the Junior League of Houston.

Prior to becoming a Principal at Patriot Wealth Management in 2004, Anna held the position of Senior Vice President and Trust Officer at Kanaly Trust Company in Houston, Texas. Prior to joining Kanaly in 1995, Anna began her financial planning and investment career in September 1992 with Arthur Andersen & Co.