

Michael J. Montgomery, CPA, CFP® Managing Director

Harris myCFO, Inc.
4900 N. Scottsdale Road, Suite 2600
Scottsdale, AZ 85251
Tel: 480.302.3777 • Fax: 480.302.3780
michael.montgomery@harrismycfo.com
www.harrismycfo.com

Michael J. Montgomery is the Managing Director of the Scottsdale office. Harris myCFO is a comprehensive family office that provides integrated wealth management services to individuals and families of substantial wealth.

Michael serves as a primary contact, financial strategist and coordinator for all wealth management and family office services in the Southwest. Michael joined the Harris myCFO organization in 2009 and brings with him over 17 years of diversified experience within the wealth management industry.



Mr. Montgomery earned a Bachelors of Business Administration in accounting from Texas A&M University in College Station, Texas and a Master of Business Administration from Southern Methodist University in Dallas, Texas. He is a Certified Public Accountant, CERTIFIED FINANCIAL PLANNER™, Personal Financial Specialist, Accredited Asset Management Specialist and a CFA Level III candidate (June 2010).

Michael is a member of the American Institute of Certified Public Accountants and an associate member of the American Bar Association (Real Property, Trust and Estate Law section).

Harris myCFO is dedicated to simplifying the complex issues that face individuals and families of wealth by delivering the guidance and services of a Comprehensive Family Office.

We give you the flexibility to build a team of specialists, coordinated by Harris myCFO, that can include your own trusted advisors along with some of the best professional talent for the various aspects of your wealth management strategy.

Harris myCFO is the next step for affluent individuals and families who desire a comprehensive wealth management solution. One that is built upon objectivity, accountability and best-in-class solutions provided on a fee-only basis. It is also designed for existing family offices who may want access to outside talent and resources to expand their capabilities.

Harris myCFO® is a brand used by Harris myCFO, Inc. providing Family Office Services, Harris myCFO Investment Advisory Services LLC, an SEC-registered investment advisor and certain divisions of BMO Harris Bank N.A. and its affiliates that are national banks with trust powers. Not all products and services are offered in every state and/or location.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

