Ian Amberson, MBA, CFA®, CFP®

VICE PRESIDENT OF INVESTMENTS

Moors & Cabot Investments
EST. 1890

CONTACT DETAILS

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CREDENTIALS

- Chartered Financial Analyst (CFA®)
- Certified Financial Planner (CFP®)
- Master of Business Administration (MBA)
- FINRA Series 7 Registration
- NASAA Series 63 Registration
- NASAA Series 66 Registration
- AZ Life & Health Insurance Licensed

EDUCATION

Arizona State University
W.P. Carey School of Business
MBA in Finance

Northern Arizona University
Bachelor of Music, Piano Performance
4.0 Summa Cum Laude
National Presser Scholar

COMMUNITY ENGAGEMENT

- Phoenix Rotary 100
- CFA Society Phoenix

Advisor Profile

Ian Amberson provides comprehensive wealth management and strategic financial guidance to high-income earners, business owners, and retirees at Moors & Cabot. He brings a multidisciplinary background spanning classical music, real estate, and institutional finance to design deeply personalized, sophisticated solutions for his clients.

Stewardship & Service

For Ian, wealth management is ultimately a profession of stewardship. He focuses on putting the needs of individuals and families first; acting as a dedicated advocate to help them preserve what they've built and navigate complex financial landscapes. He channels his natural love for solving complex financial puzzles into a tool for genuine service, anchoring high-earning professionals, business owners, and retirees navigating pivotal economic milestones. Whether partnering to coordinate a high-stakes liquidity event, untangling a complex estate settlement, or engineering tax-efficient cash flow, Ian integrates insurance planning for strategic asset protection to balance wealth compounding with disciplined risk mitigation. He strips away the industry noise, converting institutional-grade strategy into actionable clarity.

Delivering Value & Client Outcomes

Ultimately, his practice is focused on delivering three core outcomes that high-net-worth individuals and families value most:

- **Decoupling Emotion from Strategy:** Serving as a steady sounding board and partner during high-stakes liquidity events, life transitions, or volatile market cycles.
- **Identifying and Addressing Blind Spots:** Uncovering potential vulnerabilities—from tax drag and estate gaps to structural risks in insurance planning—to better support long-term multi-generational security.
- **Creating Financial Clarity:** Lightening the complex financial load for busy professionals and business owners, allowing them to focus more fully on their careers, businesses, and families.

The Comprehensive Wealth Framework

Our framework integrates advanced asset configurations with multi-layered wealth preservation strategies, allowing for clarity across each structural dimension of your financial ecosystem.

1. Financial Planning	Goal and cash flow-driven modeling to map out long-term milestones.
2. Investment Management	Customized portfolio construction tailored to specific risk parameters.
3. Tax Planning	Proactive asset location and structures designed to optimize after-tax wealth efficiency.
4. Estate Planning	Strategic multi-generational alignment to assist with asset legacy transfers.
5. Education Funding	Comprehensive structural planning to support educational milestones.
6. Risk Management	Structural exposure analysis paired with robust asset protection tools.
7. Credit Management	Reviewing liability structures and evaluating strategic financing resources.

VALUE PROPOSITION

“He provides a holistic, fully integrated approach to wealth management—partnering with clients to align all aspects of their financial lives, demystify complexity, and enable confident, long-term decision-making.”

The Professional Foundation

Ian’s diverse professional journey underpins his analytical rigor and client-first philosophy. He began his career as a concert pianist and educator, cultivating a deep commitment to precision and mastery before transitioning those skills into residential and commercial real estate. Prior to joining Moors & Cabot, Ian honed his expertise at Charles Schwab, delivering custom financial planning and portfolio management to high-net-worth families. Before that he consulted RIAs and institutional asset managers on advanced Exchange-Traded Fund (ETF) strategies at VanEck Securities. This rare blend of real-world asset experience and institutional market insight allows him to see the macro picture that others may miss.

Beyond the Office

Ian lives in Arizona with his wife, an accomplished Healthcare Architect and partner at her design firm, and their two young children. Outside of his professional practice, he remains dedicated to music, reading, travel, and a commitment to lifelong learning.

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