

Jonathan Millican, CFP® Financial Advisor, Director of Planning

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"I believe money needs two things: a purpose and a plan. My passion is to help clients discover and cultivate that purpose, develop a plan, and serve as a guide along the way."

At the age of eight, Jonathan's mother taught him how to balance the family checkbook and pay the utility bills as a summer project. His father jokingly claims to have given Jonathan two decades of stock advice courtesy of the cattle "livestock" raised on their north Alabama family farm. Jonathan amassed a childhood collection of silver dollars and half dollars, combined them with summer job savings and college internship earnings, and then spent it all at age 21 to purchase his wife's engagement ring.

Those early experiences of planning, saving, and hard work planted the seeds that have grown to allow Jonathan to have spent the past two decades serving as a wealth manager for affluent client families. Jonathan enjoys partnering with them to create holistic financial plans to pair their life goals with his knowledge of income tax, investments, insurance analysis, cash flow, and estate planning.

Before joining Bridgeworth, Jonathan began his career with a Registered Investment Adviser firm, at which he ultimately served as director of financial planning and shareholder. In addition to advising his clients, Jonathan has served as Bridgeworth's Director of Planning since 2017, a role in which he collaborates with his fellow advisors to create custom, actionable financial plans for their clients as well as consults on complex planning questions. He is tasked with ensuring that all financial plans meet Bridgeworth's high standard of quality.

Jonathan and his wife, Joanna, are avid home renovation do-it-yourselfers and, along with their two daughters, are active members of Shades Mountain Baptist Church.



HONORS

- Birmingham Business Journal's 2020 Top 40 Under 40
- University of Alabama Jack Davis Professional Achievement Award: University of Alabama, 2015
- Most Outstanding Student in Family Financial Planning: University of Alabama, 2002

AFFILIATIONS

- Leadership Hoover Class 2019-2020
- Community Foundation of Greater Birmingham: Professional Partners in Philanthropy
- Financial Planning Association of North Alabama: 2003 - Present; Chapter Membership Director, 2006; Chapter Career Development Director, 2008
- Kiwanis Club of Hoover-Metro: Golf Classic Chairman 2019-2020
- Shades Mountain Baptist Church: First Impressions Team

EDUCATION

- University of Alabama, 2002, B.S. Human Environmental Sciences, summa cum laude
- CERTIFIED FINANCIAL PLANNER™, 2005