



Jeff has been in the financial services industry for over 20 years. He is a Certified Fund Specialist® from the Institute of Business and Finance and has passed his Series 6, 7, and 63 exams as well as holding his life, accident, and health insurance licenses. He is experienced in qualified plan design as well as custom income strategies and cash flow. Jeff also has considerable experience with insurance planning as a strategy to protect wealth and future generations. Jeff has studied modern portfolio theory, which is vital to efficient portfolio modeling allowing for mean-variable analysis with a mathematical framework that is consistent with individual risk factors.

EDUCATION

Buffalo State College, Bachelor of Arts, English

PROFESSIONAL

Institute of Business and Finance, Certified Fund Specialist®
Passed Series 6, 7, and 63 securities exams - Financial Advisor*

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