

NEWS RELEASE
January 9, 2024
Buffalo, NY

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LUMSDEN MCCORMICK FINANCIAL SERVICES APPOINTS MANAGING DIRECTOR

Lumsden McCormick Financial Services is pleased to announce that **Jeffrey Budzinski, CFS[®]** has been named Managing Director.

Jeff has been in the financial services industry for over 25 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. He 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.

Jeff enjoys high altitude mountaineering and has summited mounts Kilimanjaro, Rainier, Shasta, and Washington. Born and raised in Buffalo, Jeff is a fan of Irish and 20th Century American Literature.

Since 2001, **Lumsden McCormick Financial Services**, a fully licensed investment management firm has been committed to providing a comprehensive, proactive, and accessible approach to wealth care for individuals, businesses, and institutions. It is a wholly owned subsidiary of CPA firm Lumsden & McCormick, LLP.

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