



**Jay Neary, CFP®,
Certified Senior Advisor (CSA)®**
Financial Consultant

Jay is a Financial Consultant with SVA Plumb Wealth Management, LLC.

Jay focuses on financial planning and helping clients realize their financial goals. In an increasingly complex financial world, simplifying personal finances is one of Jay's passions. He is part of a diverse team of wealth management professionals who help individuals and families accumulate, preserve and transfer their wealth.

Jay is a member of the Financial Planning Association (FPA) of Southeastern Wisconsin and the Society of Senior Advisors.

Jay enjoys reading, writing and playing guitar, as well as traveling with his wife, daughter and son to visit many family and friends around the country. They also enjoy going up to the North Woods to fish, ski, snowshoe and relax.

Jay is a CERTIFIED FINANCIAL PLANNER™ and a Certified Senior Advisor (CSA)®.

Certified Senior Advisors (CSAs)® have supplemented their individual professional licenses, credentials, and education with knowledge about aging and working with older adults. It is recommended that you verify the validity of any professional's credentials with whom you conduct business. Be sure you completely understand what those licenses, credentials, and education signify. The CSA certification alone does not imply expertise in financial, health, or social matters. For more details visit: www.csa.us



Jay Neary
Financial Consultant

Areas of Expertise

- Comprehensive Financial Planning
- Asset Management
- Investment Analysis
- Insurance Analysis
- Retirement Planning
- Financial Planning for Veterans

Education

University of Wisconsin- Milwaukee
Bachelor of Arts & Science – Economics & History

Community Involvement

Financial Planning Association (FPA)
Society of Senior Advisors