



**Jay Neary, CFP®**  
Financial Consultant

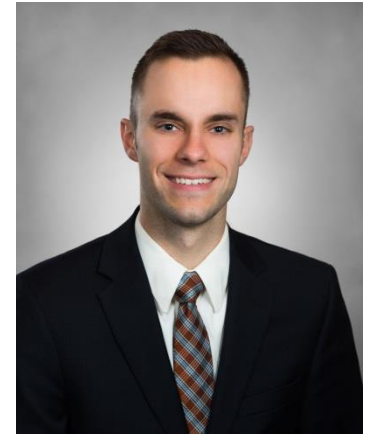
Jay is a Financial Consultant with SVA Plumb Wealth Management, LLC.

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.

Off the job, Jay is involved with Horizon Hospice where he visits patients in their homes. He is also a member of the Financial Planning Association (FPA) of Southeastern Wisconsin.

In addition to being active in his community, 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™.



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**Areas of Expertise**

- Comprehensive Financial Planning
- Asset Management
- Investment Analysis
- Social Security Planning
- Retirement Planning
- Financial Planning for Veterans

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**Education**

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

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**Community Involvement**

Financial Planning Association (FPA)

Horizon Home Care & Hospice