

Did you have a favorite teacher? One that really cared about you and took the time to educate you? Mutual funds - there's A shares, there's B Shares, there's C shares, there's I shares. What does that even mean? Perhaps you have an annuity that's earmarked for retirement. Did you know that there's surrender charges, immortality and expense charges? It's all so confusing, but it doesn't have to be confusing. A lot of times financial jargon gets in the way. I'm Jay Neary and I'm a comprehensive financial planner with SVA Plumb Wealth Management. And I would love to come speak to your organization about the necessary components required to build a financial plan, as well as the common questions that you'll need answered. Please contact Speaker Source. I would be honored to come and speak to your organization. Thank you.