



*Financial Planner
Special Care Planner*

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About Jerry

Jerry Wade is a Financial Planner and Special Care Planner at the Reilly Financial Group, a financial services organization known for its specialized team and the personalized advice and guidance they provide to clients as they build their financial security.

Jerry is dedicated to providing clients with financial solutions and works with individuals, families and business owners as they look to build financial security through every stage of life. As part of a specialized team, he can tap into a wide range of planning resources and provide clients with integrated and customized solutions to successfully fulfill their financial goals and objectives. He Prides himself in getting to know each client so that he can understand their individual needs and what matters most to them.

Areas of Focus

- Wealth Management
- Risk Management
- Financial Planning
- Retirement Planning
- Estate Planning
- Protection & Insurance
- Investment Services
- Business Planning Solutions
- Employee Benefits

EDUCATION:

- University of Toledo
- Middlesex Community College
- Life Underwriter Training Council Fellowship - American College
- Chartered Advisor for Senior Living – American College
- Retirement Income Certified Professional – American College

PROFESSIONAL & COMMUNITY ASSOCIATIONS:

- Served United States Air Force 1986-1990
- Board Member, Junior Achievement, a global non-profit dedicated to inspiring and preparing young people to succeed in a global economy

LICENSING INFORMATION:

Completed FINRA Series 6, 7, 63 & 65

CA Insurance Lic #0L06036

Security registered CA, DE, FL, GA, KY, MD, NJ, NY, PA,

Life and Health Insurance, Variable Annuity CA, DE, FL, KY, MD, MI, NJ, NY, PA