



Jay helps lead the KPM Wealth Advisors team and provides value through asset management, retirement income planning, and lifestyle preservation solutions.

James W. McIntyre, CPA

Financial
Advisor



PRACTICE EMPHASIS

- Financial, wealth, & insurance planning
- Tax-managed approaches & solutions
- Legacy, family, & estate planning

CREDENTIALS

- Certified Public Accountant
- Registered Representative
- Investment Advisor Representative



EDUCATION

- B.S. degree in Accounting, Missouri State University
- Participates in 40+ hours of CPE annually

PROFESSIONAL MEMBERSHIPS

- American Institute of CPAs, Member
- Missouri Society of CPAs, Member



LICENSING

- Series 7
- Series 66
- Missouri insurance licenses for life, accident & health, variable contracts

COMMUNITY INVOLVEMENT

- Leadership Springfield Class 4, Graduate
- First & Calvary Presbyterian Church, Member
- Twin Oaks Country Club, Member



Securities offered through Cetera Financial Specialists LLC, member FINRA/SIPC. Advisory services offered through Cetera Investment Advisers LLC. Cetera is under separate ownership from any other entity.

SIGNATURE STRENGTHS

Achiever

Responsibility

Maximizer

Relator

Strategic

BY THE NUMBERS

30+ Tax seasons survived

'77 Year of first concert

02 Children

CONTACT JAY

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