



JARED WEBER, ChFC® Financial Advisor

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Jared is an experienced Wealth Manager who has been working with individuals, families and business owners since 2007. His approach has always involved making sure that his clients are educated and understand the strategies that are being put in place. He works with his clients to take a holistic approach to the planning process. As a Chartered Financial Consultant (ChFC®), he is equally adept at working with both insurance and wealth management needs and will address all areas of one's financial life.

One of Jared's main focuses is on retirement planning. He believes that a retirement plan that only looks at how you accumulate wealth does not fully address your retirement needs. He works with his clients to look at their protection strategies and maps out a distribution plan in retirement. Through the use of sophisticated cash flow planning software, his clients are privy to an interactive model that allows for exploring a variety of "what if" scenarios to see whether their retirement plan is on track; what gaps exist; and how different strategies will impact their retirement picture.

As a big believer in educating clients, he has a passion for working with individuals who have been thrust into major life-changing events such as divorce or the death of a spouse. He will take the extra time to work with these clients to understand areas of their financial lives that they may not have been responsible for handling in the past. Nothing is more rewarding than helping a client sort through their newly changed situation and giving them the guidance and confidence to move forward.

Jared lives in Trumbull, CT with his wife and two daughters. He enjoys travelling, biking and hiking. His true passion is hockey. Whenever he has the opportunity, you will find him attending one of the many local college hockey games.

Jared maintains the FINRA Series 6, 63, 65 and 7 registrations along with his Life & Health and Property & Casualty Insurance licenses. He has a Bachelor of Science degree in Mathematics from Union College in New York.