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CONTACT:
National Ethics Association (NEA)
Phone: 800-282-1831
Fax: 760-804-7508

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Jeff D. Holmes

Specializing in Wealth Management

Member since	03/28/2006
Member through	02/24/2019
Company	Assured Financial, LLC
Address	14362 N. Frank Lloyd Wright Blvd., Suite 1000, Scottsdale, AZ 85260 US
Website	http://www.afsarizona.com
Email	jeff@afsarizona.com
Phone Number	(480) 305-5661
Industry	Financial Services
Specialty	Estate and Retirement

Description

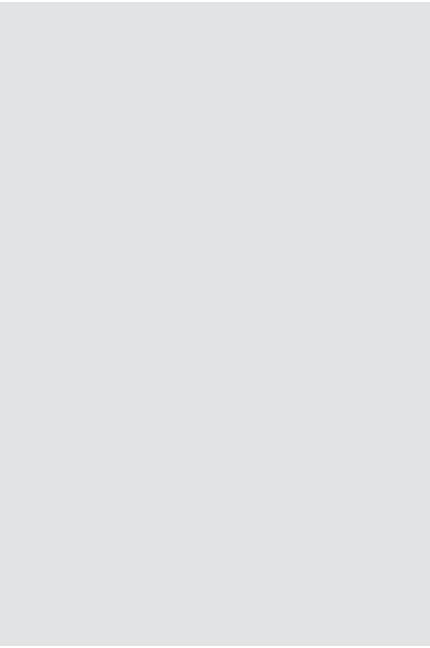
Jeff Holmes is an Investment Advisor Representative (IAR) with Prosperity Capital Advisors, a Registered Investment Advisory firm. His goal is to help clients protect their income while still growing investments within the clients' risk tolerance. During his 26 years in the financial services industry, he has aided clients in wealth preservation, helped clients increase assets and income, and worked with clients on tax saving strategies. Jeff's goal is to help his clients lower their tax bills, while possibly eliminating taxes on their Social Security, increase their fixed monthly income, and obtain better production for their financial future. He also holds the Certified Estate Planner designation from the American Academy of Certified Estate Planners. He offers an uncommon depth of knowledge in many of the critical areas of the financial landscape. Jeff's focus is on income and estate tax strategies, assisting clients looking to preserve wealth, and increase assets and income. He holds the following securities registrations: Series 7, 66, and 63, as well as Life, Accident & Health, Disability and Property & Casualty Insurance licenses.

Education

Jeff's education includes a Bachelor of Science degree in Civil Engineering Technology as well as a Master's of Business Administration from New Mexico State University (NMSU). He entered the Financial Services Industry in 1991. Throughout his many years as a financial professional, he has completed various education courses on different aspects of financial planning. A few of the topics include: IRA and 401k Planning, College Planning, Ethics for the Financial

Professional, Getting the most out of your U. S. Savings Bonds, Government Benefits Analysis, Small Business Benefits, Mortgage Management Strategies and Estate Planning Strategies. Jeff has also earned the Certified College Planning Specialist CCPS designation and holds the Certified Estate Planner designation.*

Associations



Jeff is an approved member of the National Ethics Association NEA an independent organization of insurance and financial advisors who have maintained an exemplary record of business ethics.

Financial Planning and Investment Advisory services are offered through C2P Capital Advisory Groups LLC D/B/A Prosperity Capital Advisors (PCA) an SEC registered investment adviser with its principal place of business in the State of Ohio.

Jeff Holmes is registered as an Investment Advisor Representative of PCA in the states of South Carolina, Georgia, New Mexico and Arizona. For more information regarding PCA, please visit www.adviserinfo.sec.gov. PCA does not provide tax or legal advice.

References

Kahryn Nix Business Owner Phoenix 602-266-6625, Brent Martin Business Owner Cave Creek 480-575-8886. Other references are available upon request