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## Jeff D. Holmes

Holistic Retirement Planning

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Member since	03/28/2006
Member through	02/23/2020
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Industry	Financial Services
Specialty	Retirement Planning

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## Description

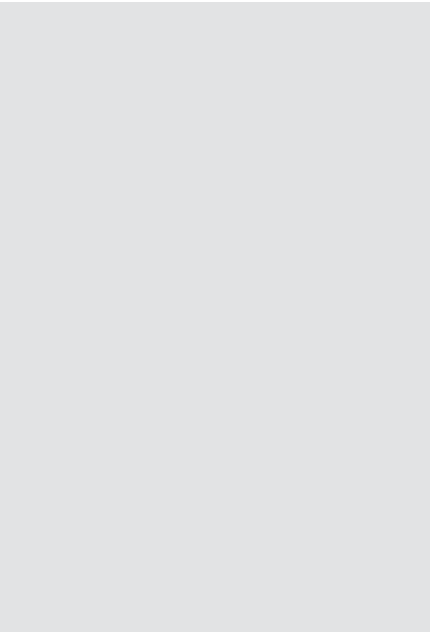
Jeff Holmes is an Investment Advisor Representative (IAR) with Virtue Capital Management a Registered Investment Advisory firm. His goal is to help clients protect their income while still growing investments within the clients' risk tolerance. During his 26 years in the financial services industry, 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 offers knowledge in many of the critical areas of the retirement planning 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 Series 66 securities registration 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.

He also holds the Certified Retirement Counselor(CRC)\* designation from the International Foundation for Retirement Education and the Certified Financial Fiduciary(CFF)\*\* designation from the National Association of Certified Financial Fiduciaries.

## 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.

*Investment advisory services offered through Virtue Capital Management, LLC (VCM), a registered investment advisor. VCM and Assured Financial LLC are independent of each other.*

*\*The CRC(Certified Retirement Counselor) designation is granted by the International Foundation for Retirement Education.*

*\*\*The CFF (Certified Financial Fiduciary) designation is granted by the National Association of Certified Financial Fiduciaries*

## **References**

Brent Martin Business Owner Cave Creek 480-575-8886. Other references are available upon request