



Jonathan Jetter, CFP(R), LLC

About Us



Providing sound financial advice for individuals and small businesses through personal service.

Jonathan began his career as a financial advisor with a privately held firm in 2001 before transitioning to an independent advisor in 2008. Jonathan earned a Bachelor's degree from Baylor University double majoring in Entrepreneurship and Financial Services & Planning. He continued his academic pursuits and satisfied the educational, examination, experience, and ethics requirements for CFP® Certification in 2006. Jonathan's area of expertise is personal and small business retirement planning.



Services

- Retirement Planning
- College Planning
- Wealth Protection
- Tax Reduction Strategies
- Portfolio Management



Accounts

- Advisory
- Brokerage
- Mutual Funds
- Insurance

Contact Us

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