



JEFFREY B. GRECO, ChFC, CFS, CLU, REBC, RHU, CLTC

Jeffrey B. Greco has 21 years of experience in the field of wealth management and retirement planning. He began his career as an independent insurance agent and stock broker. Shortly thereafter, Mr. Greco became affiliated with American Express...first in the capacity of Financial Advisor and then as a District Manager and Field Vice President. Mr. Greco's tenure with American Express (now Ameriprise Financial) spanned 16 years.

More recently with The Heritage Group, and with its affiliate, The Producers Group Advantage, and currently with the Greco Planning Group, Mr. Greco's life's work has been to help his business-owner clients by conceiving pension plans, trusts and insurance products to meet their current and future financial needs. His specific expertise includes defined-contribution plans, defined-benefit plans, and a variety of life insurance products including survivorship life, premium-financed life policies, qualified life insurance, and traditional life policies.

Mr. Greco has substantial qualifications for the work he does. He holds the credentials of Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Registered Health Underwriter (RHU), Certified Long Term Care Consultant (CLTC), Registered Employee Benefit Consultant (REBC), and Certified Fund Specialist (CFS). Additional distinctions include Business Financial Advisor (BFA) and recognition by the Million Dollar Round Table. Mr. Greco's industry licensure consists of Series 7, 63, 24, Life-Accident-Health Insurance, and Property and Casualty Insurance.

Mr. Greco takes time from his busy schedule to serve as a local board member for the Diabetes Research Institute. Additionally, he provides charitable support for the Juvenile Diabetes Research Foundation.