



JOSE F. VELASCO
CFP® / CHFC® / LUTCF®

Financial Advisor

LET'S CONNECT

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BUSINESS BIOGRAPHY

As a Financial Advisor, I help my clients make informed and meaningful financial decisions based on their unique values, needs and priorities.

Together, my clients and I build a financial strategy that encourages them to think about where they've come from, where they're going, and what they'll leave behind.

Knowledge is the key to a successful financial future. My background, experience and commitment to providing you with the resources you need to make financial decisions, can help make your financial future as successful as you need it to be.

I pride myself in getting to know each client so that I can understand their individual needs and what matters most to them. This helps me recommend products and strategies designed to meet their current needs, and more importantly, their future needs.

HERE'S HOW I CAN HELP YOU

- Whole Life Insurance
- Universal/Fixed/Variable Term Life Insurance
- Long-Term Care Insurance
- Fixed/Variable Annuities
- Estate Conservation Strategies
- Education Funding Strategies
- Retirement Strategies/IRA Consolidation
- Charitable Giving/Estate Strategies