

## Jeff McNaney

Financial Services Representative  
Principal Securities Registered Representative  
Financial Advisor



*Ready to focus on your financial goals? I can help.*

*Your goals — my focus. Let's put the strategies together to work for you. Whether your priority is personal finances, your business, or both, I'm committed to helping you succeed.*

### Let's connect to get started:

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Visit my LinkedIn Page! [Jeff McNaney](#)

<http://www.studio9fis.com/>

Jeff McNaney is a longtime resident of Northern CA, therefore, he understands the particular challenges residents of the Sacramento area face. His past experience managing a multi-million dollar business in several locations throughout the area, and his natural communication skills equally suit him in supporting the needs of small business operators and their employees. Jeff's background as a California Registered Tax Preparer has made him keenly aware of the role proper tax preparation and execution take in tax reduction.

### EDUCATION & CREDENTIALS

- Development Director of the Northern California Business Center for Principal® 2007-2012
- Series 7 & 66 Securities Registrations
- CA, NV, & IA Life and Health Insurance Licenses
- NAIFA Board member 2010-2012

Currently, Jeff is a Registered Representative and Investment Adviser Representative for Principal Securities, Inc. who has been helping individuals, families, executives, and business owners in the following areas:

- Wealth Accumulation and Transferal Strategies
- Cash Flow Analysis
- Retirement Distribution
- Risk Management Strategies
- Business Continuation and Exit Planning
- Executive & Group Employee Benefit Solutions
- Tax Efficiency Strategies

Jeff is married to his beautiful wife Rebecca McNaney, and has three wonderful children: Marena, Stephen and Amaya.

Insurance products issued by Principal National Life Insurance Company (except in New York), Principal Life Insurance Company and the companies available through the Preferred Product Network, Inc. Securities and advisory products offered through Principal Securities, Inc., 800/247-1737, [Member SIPC](#). Principal National, Principal Life, the Preferred Product Network, and Principal Securities are members of the Principal Financial Group®, Des Moines, IA 50392. Jeff McNaney, Principal National and Principal Life Financial Representative, Principal Securities Registered Representative, Investment Adviser Representative. t161202065a