



Jana Witney, RICP®

Financial Representative
Principal Securities Registered
Representative
Financial Advisor



Seeking control over your financial future?

I can help — by reviewing your financial picture, and suggesting customized solutions to help you address gaps and prepare for your financial future.

Let's connect to get started:

262-215-1282
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10200 W. Innovation Drive, Suite 800
Milwaukee, WI 53226

EXPERIENCE:

- Committed financial advisor for 14+ years
- With Principal since 2005; previously with Smith Barney
- Specialized in helping individuals and businesses set goals and implement strategies designed to achieve financial success

EDUCATION & CREDENTIALS

- BBA in Marketing and Health Care Management– University of Wisconsin - Madison
- FINRA Series 7 and Series 63 and Series 65 securities registrations
- Life and Health Insurance license
- RICP® designation focusing on retirement income strategies

INTERESTS:

- Time with family and friends
- Volunteers in the church and community

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