



Jacob Dee

Financial Services Representative
Principal Securities Registered Representative
Financial Advisor



Your unique goals—my top priority. I'm committed to helping you achieve financial success

Let's connect to get started:

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EXPERIENCE:

- I want to help people understand the financial options available to them, and then for them to take advantage of these opportunities to ultimately make their lives easier
- New to the financial services industry
- Traded stocks in his personal account for four years

EDUCATION & CREDENTIALS

- Bachelor of Science in Economics & Philosophy with a European Studies minor from the University of Wisconsin - Madison
- FINRA Series 7 & 66 securities registrations
- Wisconsin Life & Health insurance license, Chartered Leadership Fellow® (CLF®)

INTERESTS:

- Can play piano
- Aficionado of the fine arts
- Enjoys hiking and playing tennis
- Hopes to travel to Europe in the next few years

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