



**Jerry Kelleher**

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**Background & Experience**

Jerry Kelleher brings over 15 years of financial services experience. He assists financial advisors, trust advisors, CPA's and attorneys with all aspects of the planning process, from case development and design to delivery for estate, business, retirement and long-term care planning strategies. Jerry has extensive carrier and product knowledge, which allows him to offer the most appropriate solutions for each case and educate clients on making informed decisions.

**Certifications & Education**

- St. John Fisher College, Rochester, NY - B.S. Business Management, 1985