



THE CARTA GROUP
Navigate Life

Jeremy T. Caza

Partner



Jeremy Caza graduated from the University of Rochester, in Rochester, NY where he majored in Economics with concentrations in Finance and Marketing. While in college, he participated in various athletic leagues and was a volunteer for several youth benefits including coaching weekend basketball clinics and tutoring services for young children.

Jeremy began his financial services career with Sagemark Consulting / Lincoln Financial Advisors in 2005 and moved to The Carta Group / INVEST Financial in mid-2015. Jeremy currently works with a wide range of clients in several different states to offer fee based financial planning services. He works primarily with business owners or executive level individuals in providing estate, retirement, investment and business owner planning strategies from his Syracuse, NY office. He has also

developed a strong focus on consulting services for company sponsored retirement plans such as 401k's or 403b's. Jeremy was recognized for his hard work in the employer retirement plan market place by being named one of the top retirement plan advisors in the country in May 2015 by *Financial Times* magazine. His 401k/403b clients include non-profit organizations, technology firms, manufacturing companies, and medical services companies. Jeremy is routinely a featured speaker at various community and professional forums to provide information on various financial topics.

Jeremy began volunteering for various community events at a young age and has continued that involvement in the local community today. He is a past Steering Committee member of IGNITE ; a young professionals community involvement group for the greater Auburn, NY / Cayuga County area. His involvement with this group allowed him to volunteer for various charities and events including the IGNITE the Vote campaign and Auburn's annual Winter Fest. In addition, Jeremy has been an active member in the University of Rochester alumni Career Advisory Network which provides career advice to current and former U of R students.

Jeremy lives in Auburn, NY with his wife, Melissa and their two daughters, Madison and Gabriella. When not working, Jeremy enjoys outdoor activities such as playing golf, softball, basketball, traveling, and fishing.

At The Carta Group, we are dedicated to helping you:

-  Identify your goals;
-  Analyze your current program;
-  Develop a comprehensive written financial plan based on sound advice;
-  Implement that plan
-  Update the plan on a regular basis

Best of all, we have never lost sight of one essential element- personal service. The true value of your planning is measured by the service you receive AFTER your plan is implemented.

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