



Jeff Cathey

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Background & Experience

For nearly 20 years, Jeff has provided objective advice and solutions to Financial Advisors and their clients. For affluent and wealthy families, he focuses on income and wealth protection as well as transfer strategies designed to maximize the level of assets and minimize tax exposure intended for future generations and charitable organizations. For businesses, he specializes in succession, supplemental retirement and key person planning. Jeff is known for his service model, which offers Financial Advisors and their clients the most effective and appropriate recommendations within the field of insurance, long term care, and estate planning. His level of knowledge and resources combined with a commitment to setting realistic expectations and keeping all parties informed every step of the way really does set him apart from the crowd. Working closely with a team of specialists in financial, tax and legal planning, Jeff advises Financial Advisors and their clients on situations ranging from the simplest, most straightforward income protection opportunities to the most complex estate and business succession planning scenarios.

Jeff and his wife, Heather, have been married since 2009, and together have two young boys, Luke and Dylan. He enjoys spending time with his family and friends, playing golf and fishing. Jeff and his family are active members of Rocky Mount Methodist Church.

Certifications & Education

- University of Georgia, Athens, GA - B.B.A. Banking and Finance
- Oglethorpe University, Atlanta, GA - Certified Financial Planner® Program