



Logan J. Reed

Vice President/ Wealth Management  
CFP®, CIMA®, CLU®, AIF®  
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# Financial Consultant Background

## Business Experience

2013 - Present: Janney Montgomery Scott  
Vice President/ Wealth Management New Haven, CT

Registered Representative since 2007

## Education & Licensing

Series 7 - General Securities Representative  
Series 6 – Investment Company and Variable Contracts  
Series 63 - Uniform State Exam  
Series 65 - Investment Advisory Agent  
CT, CO, DE, FL, GA, NH, NY, MA, NC, SC - Life, Health & Disability  
Insurance Licensed  
Certified Financial Planner®  
Certified Investment Management Analyst: The Wharton School  
UPENN Chartered Life Underwriter: The American College Chartered  
Retirement Planning Counselor: The College for Financial Planning  
Accredited Investment Fiduciary, FI360  
Preferred Portfolio Management – Portfolio Concepts  
B.A. – Providence College

## Associations

Branford Community Foundation: Treasurer  
St. John Bosco Parish: Investment Committee  
Branford Rotary Club: Former Director

## Awards & Recognition

Forbes Next Generation Wealth Advisor 2018, 2019

## Services

Financial Planning  
Discretionary & Non-Discretionary Investment Management  
Retirement Planning  
Insurance Planning  
Education Planning  
Mutual Funds  
Equities & Options  
ETF's, UIT, & Alternative  
Investments Tax Free & Taxable Bonds  
Annuities, Life, Disability, Hybrid, & LTC Insurance  
Retirement Plans (401k, 547, PSP, Safe Harbor, SEP, etc.)  
Defined Benefit Plans  
ESG/ Socially Responsible Investing

