



Jon DePrimo

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Jon DePrimo is a specialist in the design and implementation of numerous advanced planning strategies, including, estate planning, business succession planning, and charitable planning. Jon serves as a resource assisting Financial Advisors with identifying, designing and implementing wealth management solutions for their clients. For most of these clients, this involves working with their advisors to establish, fund and leverage multi-generational wealth strategies.

Jon started his career as a Financial Advisor, Registered Rep. with MetLife. Since 2010, Jon has been the Director of Advanced Planning for Brian K. Adams & Associates, Inc. Jon works closely with Financial Advisors to discuss, strategize, and implement advanced planning techniques that may be appropriate for their Clients. Teaming with financial institutions such as Morgan Stanley, UBS, OPCO, Wells Fargo, and many others throughout the country, he has developed advanced case design presentations as well as worked on complex high net worth cases to understand the clients' needs, objectives, and goals. These skills, along with his considerable capabilities as a recruiter, trainer and manager of financial advisors, make him a valuable addition to the BKA Private Wealth Consulting Team.

Jon earned his B.S. in Business Administration with a specialization in Marketing & Management from Elmira College in Elmira, New York, where he played and captained the College's Soccer Team. He maintains his Series 6, 63, Life and Health, and Long-Term Care licenses.

EDUCATION

- Elmira College, Elmira, New York
B.S. in Business Administration, Specialization in Marketing & Management