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John L. Jenkins, AEP®, EA, CFP®

President and Chief Executive Officer

A third generation San Diego native, John has been a financial professional since 1982. Although he originally studied to be a school teacher, he quickly found his calling in educating people for financial well-being and helping them achieve it.

John holds Bachelor's and Master's Degrees from San Diego State University. He developed a strong financial foundation by pursuing several professional certifications and designations. In 1985, he completed his Certified Financial Planner® professional studies through the College for Financial Planning in Denver and was admitted to the Directory of CFP Practitioners in 1993. John also completed a 3 year post-doctoral training in Wealth Strategies Planning from the Estate and Wealth Strategies Institute at Michigan State University and is endowed as a full Fellow of the Esperti Peterson Institute. In addition, he is a Certified Agent for the California Partnership for Long Term Care (AEP®) and an Enrolled Agent (EA), having successfully passed the exam administered by the Internal Revenue Service.

Maintaining his love for teaching, John conducts numerous seminars and workshops every year. He has been a guest on the PBS show "The Money Makers" and its successor, "The Financial Advisors," as well as the syndicated news magazine show "Heartbeat of the City." He has also authored and co-authored several books and publications.

John was an Adjunct Faculty member of the National Endowment for Financial Education in Denver and is recognized in both "Who's Who in California" and "Who's Who in Finance." He completed five years of service on the Board of Directors of the San Diego Chapter of the Financial Planning Association (FPA) and the Board of the San Diego Estate Planning Council. He is currently serving as a member of the Estates and Trusts Committee for Rady Children's Hospital Foundation.

He has been quoted in many local and national publications including: *Financial Planning News*, *The San Diego Union Tribune*, *La Jolla Light, Research* magazine, *PRWeb.com*, and *San Diego Business Journal.*

John is a member of the Financial Planning Association, The California Society of Tax Consultants and the Estate Planning Council of San Diego. In addition to adhering to a strict code of ethics for these organizations, he is required to obtain a minimum of 60 hours of continuing education credits every two years to retain active membership and licensing status.

John is the proud father of four children and a grandfather to five granddaughters. His close-knit family members all reside in San Diego County. In his spare time, John plays guitar and sings, on occasion professionally. He enjoys movies, cycling, and culinary pursuits. He volunteers at his church in the multimedia ministry.

FAVORITE QUOTE

"I may have pushed your buttons, but I didn't install them." - Wendy Craig-Purcell

AREAS OF EXPERTISE

- Retirement Planning
- Collaborative Wealth Management
- Consultative Financial Planning
- Private Asset Management & Planning
- Insurance Planning & Estate Planning
- Real Estate & Alternative Investments

EDUCATION & CERTIFICATIONS

- Certified Financial Planner® (CFP®)
- Certified Agent for the California Partnership for Long Term Care (AEP®)
- Enrolled Agent (EA)
- Fellow; Esperti Peterson Institute; Michigan State University
- Fellow; Southern California Institute
- Bachelor's and Master's Degrees; San Diego State University

FUN FACTS

- Completed a double century (200 mile) bicycle ride on June 23, 2012. Pedaling time was 13 hours 35 minutes
- Pedaled 13,825 miles in 1,017 hours, 30 minutes and 21 seconds, burning 722,355 calories (and counting) to date
- Played guitar and performed at more than 100 weddings