



## Jeffrey Crouse, CFP®

### Financial Advisor

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Jeffrey is a financial advisor with Saltmarsh Financial Advisors, bringing experience in financial planning, portfolio management, and investment strategy. He works closely with individuals, families, and small businesses to help them align their financial goals, risk tolerance, and long-term objectives.

His expertise includes developing personalized financial plans and managing portfolios with a focus on growth, risk management, and diversification. Jeffrey's approach is collaborative and client-focused, centered on clear communication, thoughtful planning, and helping clients feel confident in their financial journey. Outside of work, he enjoys staying active as a decent pickleball player and challenging himself as a Rubik's Cube solver.

### Education

B.B.A. of Finance - University of Kentucky

### Certifications

Certified Financial Planner (CFP®)

FINRA Series 7, 63 & 66 Licenses

FL 2-15 Health & Life - Florida Department of Financial Services



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