

JEREMY A. WHALEN

FINANCIAL ADVISOR



JEREMY A. WHALEN

(p) 215.230.8640

(f) 215.230.8643

jwhalen@foundationsfinancial.com

515 North Main Street
Doylestown, PA 18901

www.foundationsfinancial.com

Our goals can only be reached through a vehicle of a plan, in which we must fervently believe, and upon which we must vigorously act. There is no other route to success. - Pablo Picasso

Jeremy is a Financial Advisor with Foundations Financial Partners, LLC providing comprehensive insurance, investment solutions, and financial planning services to individuals, families, and businesses. Jeremy holds FINRA Series 7 and 66 registrations and is a licensed life, accident, and health insurance professional.

Jeremy received his Bachelor of Arts degree in Political Science from Taylor University where he was a member of the student senate and club lacrosse team. Subsequently, Jeremy obtained his Juris Doctorate from the University of New Hampshire—Franklin Pierce School of Law, where he received a certificate in health law and policy and participated in the Consumer Protection Law Clinic.

Prior to beginning his career in the financial services industry, Jeremy was an attorney admitted to practice in Pennsylvania and New Jersey. Specifically, his practice focused on the defense of medical malpractice, professional liability, bad faith, and general insurance claims. As Jeremy continued through his legal career, he realized that he desired to help people on a more personal level. After careful deliberation and reflection, Jeremy decided to transition to the financial services industry in order to fulfill his passion of helping individuals, by assisting them in achieving financial security and stability.

"I have always had a desire to use my career to make a positive impact on the lives of others. I strive to help individuals and businesses properly protect their assets while also building for the future. Being a Financial Advisor at Foundations Financial allows me the opportunity to help those in my community properly protect themselves and their loved ones or business from a financial perspective."

Jeremy currently resides in Doylestown and enjoys playing golf, snowboarding, and spending time with his family and fiancé, Pam.

*We do not provide specific tax or legal advice.

Jeremy is a Registered Representative and Investment Advisor Representative of Securian Financial Services, Inc. Separate from the financial plan and our role as financial planner; we may recommend the purchase of specific investment or insurance products or accounts. These product recommendations are not part of the financial plan and you are under no obligation to follow them. Securities and investment advisory services offered through Securian Financial Services, Inc., Member FINRA/SIPC. Securities dealer and registered investment advisor. Foundations Financial Partners is independently owned and operated.