



Jason Keller, CFP®

Senior Wealth Planning Specialist
Franklin Templeton Academy

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Background

Jason Keller specializes in applying financial planning principles and techniques to assist advisors and clients in reaching their financial goals. His specific areas of expertise include higher-education planning, income tax mitigation, wealth transfer, and cash flow analysis. His commitment to these key aspects of financial health ensures that clients receive comprehensive and tailored advice, helping to pave the way for their financial success.

Prior to joining Franklin Templeton, Jason worked at Wells Fargo for 13 years helping their advisors tailor customized solutions for high-net-worth clients.

Credentials and awards

Jason is a CFP® professional who has dedicated his career to helping investors comfortably navigate conversations around managing wealth.

Personal

Jason and his wife, Savanna, reside in St. Petersburg, FL. They enjoy spending time at the beach and seeing live music.

Franklin Templeton Academy delivers the knowledge you need to stay current and move ahead. We strive to provide value beyond investing to financial professionals so that you, in turn, can provide superior service to your clients.

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