CHRIS JACOB, CFP

Co-Founder of NextPoint Solutions

Chris is Co-Founder of NextPoint Solutions and a registered representative with Saxony Securities, Inc. (SSI).

Over the course of his 30+ years in the industry, Chris has advised over 500 individual and corporate clients on the accumulation, protection, and preservation of capital, including estate and investment tax strategies and most recently, the proprietary, “Pension Optimization Plan” - a simple, yet efficient repositioning of pre-tax assets to maximize retirement income and wealth transfer.

Chris has conducted more than 200 presentations nationwide on topics ranging from Estate Tax Planning, Family Wealth Preservation, and Tax Smart Retirement Planning. He was lauded with a coveted speaker spot at Top of the Table in 2016, where he spoke to a 400 person audience comprised of the top 1% of financial planners on the continent.

Today, he offers certified and sanctioned professional development for CPAs, attorneys, CFP® professionals, charitable advisors, and colleagues in the financial advisory industry. Chris obtained his CERTIFIED FINANCIAL PLANNER degree in 1988. He received his Bachelor of Science in Economics from the University of Illinois at Urbana-Champaign in 1983.

The most significant quality Chris possesses is his unique ability to distill complicated financial planning solutions and structures and present them in a way that is not only engaging and educational, but actionable and results driven.