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Dow 10318.16 **-14.28** 4:31pm
Nasdaq 2146.04 **-10.78** 5:30pm
S&P 500 1091.38 **-3.52** 5:01pm

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Jeffrey C. Weiss, ChFC[®], CLU[®]

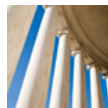
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Welcome



Our approach to investing is based on our time-tested way of doing business. We offer our clients sound investment counsel based on our research, intellect and hard work. Whether you are beginning a relationship with our firm or broadening an existing one, we think you'll see that we offer unique advantages to you as an investor.

Education and Licensing

- B.A. - Economics, 1975
Magna Cum Laude, Honors College
Michigan State University
East Lansing, MI
- ChFC - Chartered Financial Advisor, 1992
The American College
Bryn Mawr, PA
- CLU - Chartered Life Underwriter, 1992
The American College
Bryn Mawr, PA
- Series 7 - General Securities Representative
- Series 63 - Uniform State Exam
- Life, Accident, Health & Variable Annuity Licensed

Associations

- Commercial Pilot
Airplane Multiengine Land
Instrument Airplane
Private Pilot Privileges
Airplane Single Engine Land
Airplane Single Engine Sea
- AOPA - Aircraft Owners and Pilots Association (1977)
Life Member
- AOPA Air Safety Foundation
President's Council
Life Member
"Hat in the Ring Society"
- The 1940 Air Terminal Museum (1999)
Board of Directors
- The Houston Aeronautical Heritage Society
Life Member
- Angel Flight South Central (1999)
Volunteer Pilot
- EAA - Experimental Aircraft Association (1996)

Business Experience

- **1984 - Present: Morgan Stanley Smith Barney***
Senior Vice President - Wealth Management
Financial Advisor
Houston, TX
- Licensed in the financial services industry since 1976

Services

- Annuities
- Asset Management
- Certificates of Deposit
- Estate Planning
- Exchange Traded Funds
- Financial Planning
- Fixed Income
- Lending Services
- Municipal Bonds
- Philanthropic Services
- Qualified Plans
- Retirement Planning
- Wealth Management
- 529 Plans

- EAA - Central Texas Chapter 1347
- EAA - Young Eagles Flight Squadron Leader (2000)
- Seaplane Pilots Association (2005)
- Challenge Air for Kids & Friends (2000)
- Colonel - Commemorative Air Force (2008)

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