



Jody graduated from Bucknell University with a B.S. in Biology and a concentration in Business. She received her CERTIFIED FINANCIAL PLANNER™ designation in 2002. This is the only financial designation that has a National Certifying Exam and a National Board. CFP®'s abide by a Code of Ethics, two of which are a vow of confidentiality, and have a fiduciary duty to always put the client's interests above their own. She has had experience in both the medical and pharmaceutical industries and has managed a small business. Jody focuses her practice in the areas of comprehensive financial planning and solutions for individuals and closely held businesses. Her financial planning is inclusive of the areas of wealth accumulation and distribution, insurance planning and college funding. She specializes in the area of retirement planning, having obtained a Certificate in Retirement Planning from the Wharton School at the University of Pennsylvania. She helps address all the issues surrounding retirement planning from health care and long-term care planning, to retirement income withdrawal and distribution as well as estate planning issues. She holds her FINRA Series 7 & 66 securities registrations as well as her NJ State Life & Health License.

Jody has been working with Family Law Attorneys and Mediators providing insight into the financial aspects surrounding divorce to achieve a fair and equitable settlement. She helps the client to consider all the financial and tax ramifications of decisions that need to be made, so that not only do they have a clear view of the future, but they feel empowered to move forward. Jody is a CDFA™ (Certified Divorce Financial Analyst) and is the Treasurer of the New Jersey Collaborative Law Group serving on the State Board of Collaborative Practitioners. She has spoken extensively in the areas of divorce and retirement planning, has taught a course at ICLE, and writes frequently for the NJ Star Ledger, the state's largest newspaper.

Jody is active in the Financial Planning Association of NJ and participates in pro bono work with the organization. She is a member of the Morristown Chamber of Commerce serving on the Women in Business Steering Committee. Jody is active with St. James Church and serves on the Board of the Somerset Hills YMCA. She enjoys competitive tennis and paddle tennis and is an avid swimmer. She lives in Basking Ridge with her husband, Robert, an orthopedic surgeon, 4 children and 2 dogs.

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