Jeremy Evens
NSSA®

Financial Advisor

jevens@LumsdenCPA.com

Jeremy joined Lumsden & McCormick Financial Services in 2023 as a financial advisor. He has sixteen years of professional experience in the financial advising industry. Jeremy has his Series 7, Series 66, Life Insurance, Health Insurance, and Long-Term Care licenses. He has experience in financial planning, wealth management, tax strategies, and insurance planning.

As a National Social Security Advisor (NSSA®), Jeremy has a comprehensive understanding of various facets of Social Security including benefit calculations, strategies for maximizing benefits, and understanding how factors like spousal benefits, retirement age, children, and public employee pensions influence outcomes. He also advises on options for married couples, divorced individuals, and surviving spouses, helping clients make informed decisions on when to begin receiving benefits.

EDUCATION
New England College of Business, Finance and Financial Management Services, *currently enrolled*

PROFESSIONAL
National Social Security Advisor (NSSA®)
Passed Series 7, 66, and Life & Health securities exams - Financial Advisor*

Securities offered through Avantax Investment Services℠, Member FINRA, SIPC. Investment Advisory services offered through Avantax Advisory Services℠. Insurance services offered through an Avantax affiliated insurance agency.