



Jonathan Kearn

Financial Consultant



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Jon Kearn literally grew up in the insurance and financial services industries. As the son of an insurance top producer he has been exposed to and inspired by the world of financial solutions since childhood. Building on this strong foundation, Jon developed his expertise in individual retirement funding and distribution solutions.

Over the years, Jon has expanded his expertise to include designing business succession plans, ownership risk mitigation plans, wealth transfer plans, and estate plans. For nearly a decade, as owner and former Financial Services Representative, Jon managed the marketing, client acquisition, business operations, plan design implementation, and review for Kearn and Associates, an insurance brokerage established in 1974.

He has been awarded numerous Top Producer awards and was a member of the MDRT Mentor Program, GLI Elite Leader Program, and Annuity Champion Elite Circle while he was with New York Life.

- Owner and Financial Services Representative with Kearn and Associates, Insurance Brokerage, established 1974
- Previous Agent, New York Life Insurance Company
- Previous Management Trainee Manheim Auctions
- Awarded multiple Top Producer awards while with NYL
- Member GLI Elite Lear Program, Annuity Champion Elite Circle, and MDRT Mentor Program with NYL

Degrees, Certifications, and Registrations

- NYLIC University Insurance Program
- University of Florida, Bachelor of Science in Finance, Honors Program
- Series 6 Securities Registration
- Florida 2-15 Life, Health, and Variable Annuity Agent License

Expertise

- Designing business succession plans, ownership risk mitigation plans, wealth transfer plans, and estate plans, along with designing individual retirement funding and distribution solutions

View on the Fulcrum Partners website: <https://www.fulcrumpartnersllc.com/team/jon-kearn/>

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