Merrill Private Wealth Advisor Jake Dunn

Introduction to Meltzer, Dunn & Associates Group

Running Time: (1:48)

We're focused on serving clients with substantial wealth and are most impactful when they allow us to help them organize their financial lives. We help our clients understand their financial picture from the bottom up. We want to know what they own, how they own it and what their goals are. We want to understand the intention of their wealth before we start talking about investments.

[Divider]

In addition to reviewing and managing our clients' investments, we help them with estate planning services, tax minimization strategies and insurance. We also offer expertise on the full range of family wealth issues. We help our clients define their family values, conduct family meetings, educate younger generations and engage in philanthropy. In many cases, we stress the importance of proper trust and estate planning to help mitigate estate taxes and to offer asset protection for families in coordination with their estate planning attorneys and tax professionals. I really enjoy connecting with second and third generation family members. Recently, I sat down with a client's son and his fiancé to work on budgeting issues and wealth planning. It feels great when the parents are pleased that we're helping their kids and when we're able to empower the next generation with financial knowledge.

[Divider]

Our team has deep expertise and exceptional knowledge and skills. We offer boutique experience with inside the broader Bank of America organization and can handle virtually any client matter.

I'm Jake Dunn. I'm honored to serve my clients and proud to work at Merrill.

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