



**Jordan P. Gates, MSFS, CFP<sup>®</sup>, CFS, ChFC, CLU, LUTCF**  
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Fusion Tax and Wealth Management  
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### **Education:**

- B.A. Philosophy - Judson Baptist College.
- Masters Degree in Financial Services (MSFS) – The American College.
- Certified Financial Planner<sup>™</sup> (CFP<sup>®</sup>) - Denver College.
- Certified Mutual Fund Specialist (CFS).
- Life Underwriter Training Council Fellow (LUTCF).
- Chartered Life Underwriter (CLU) – The American College.
- Chartered Financial Consultant (ChFC) – The American College.
- Graduate level certificate in Estate and Income tax planning – The American College.

### **Memberships:**

- Registered with the National Association of Securities Dealers.
- Member Financial Planning Association (FPA).
- Member of the Portland Estate Planning Council.

### **Career Highlights:**

- Over twenty-five years in the financial services industry.
- Million Dollar Round Table Top of Table Qualifier.
- President's Club Member 2000-2006.
- Featured radio host on Financial and Estate Planning.
- Recognized national educator on income and estate tax issues.
- Senior faculty member for The American Tax Council.
- Taught the Estate Planning course for the Life Underwriting Training Council.

### **Personal:**

- Married (wife Sheri), two children (Alicia and Katie).
- Hobbies include computers, reading, writing, ham radio, Wave Running as well as playing drums in music groups.

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