# JEFFREY G. WEST

## FINANCIAL ADVISOR
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Jeffrey is a founding principal member of Financial Compass Group, LLC and co-creator of The Panoramic Process, a financial behavior strategy based on risk-assessment and tax-tactical strategies. Known for his financial leadership,
Jeffrey brings more than 30 years of experience assisting clients in the areas of retirement plan design, estate, insurance, investment management, and financial planning strategies, and has previously served on the faculty of Boston University's Metropolitan College Program for Financial Planners.

As a mentor for other advisors, Jeffrey has lectured extensively for many professional organizations, including the National Tax Institute, the Boston Tax Institute, several Massachusetts Estate Planning Councils and state Societies of CPAs, including Florida, Massachusetts, New Hampshire, New York, Kentucky and Virginia.

His planning advice is often highlighted in the media, and has been featured in major publications such as the Boston Herald and the Wall Street Journal. In addition, Jeffrey was radio co-host on the nightly "Money Mechanics" show. He has authored articles in the Massachusetts Society of CPAs' Review Magazine and was awarded their "Lamp of Learning" award for teaching excellence.

Jeffrey's professional associations also include being past Chairman of The Massachusetts Society of CPAs' Personal Financial Planning Committee. He has served on the Board of Directors of the Boston Life Underwriter's Association, now known as National Association of Insurance and Financial Advisors-Boston, is a multiple qualifier of the MDRT Top of the Table and is a member of the Financial Planning Association. His integrity and passion also translate into his philanthropic interests: As an avid cyclist, Jeffrey is very active in raising awareness and financial support for the Pan-Mass Challenge, whose mission is to raise money for life-saving cancer research and treatment at the Dana-Farber Cancer Institute.

Jeffrey started his career as a practicing CPA with Touche Ross & Co, now known as Deloitte. After several years in public accounting he became a Controller and CFO of two businesses, where he experienced firsthand management issues of multimillion dollar private companies. Jeffrey received his Master of Business Administration from Bentley College and Bachelor of Science in Business Administration with honors from Boston University.