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Jagdeep Kaur

Client Service Manager
CRPC®, CLTC®

Inspired by a university instructor's passion for positively impacting people's lives through financial planning, Jagdeep chose a career in financial services. That instructor was none other than Jon Goldstein, and it was not long after that Jagdeep joined the Goldstein Advisors team, which looking back is now over 10 years ago.

"Watching him help clients prepare for important life events and work to achieve their retirement dreams has kept my interest alive during the years I've worked for him," Jagdeep says.

As a client service manager, Jagdeep answers clients' questions about their accounts, responds to their needs and concerns, gathers information and plans agendas for client meetings, and completes tasks for follow-ups after client meetings.

Jagdeep received a Bachelor of Arts in Economics and French in India and later achieved a Bachelor of Science in Personal Finance from the University of Wisconsin – Madison. She is passionate about spiritual enhancement and is grateful for a mother who taught her the importance of being honest, truthful, sincere, and upright in all walks of life, come what may.

Jagdeep participates in local community initiatives and helps provide meals to the homeless through her association with Sikh Temple of Madison. She enjoys traveling with her husband and two daughters, and her favorite destinations are South Africa, Turkey and New Mexico. Jagdeep dreams of one day backpacking around the world to learn about different cultures.

In her spare time, she also enjoys hiking, sketching, photography, painting, de-cluttering and learning new cooking techniques.

CERTIFICATIONS

- » Chartered Retirement Planning Counselor (CRPC®)
 - » Certified Long-Term Care Specialist (CLTC®)
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