Thomas J. (Jeff) Cobb, CWS®, CFP®, AIFA®

About Jeff

Jeff's energy and enthusiasm form the foundation for his ability to connect with advisors at all stages in their career. After 17 years of experience as an insurance and wealth advisor, Jeff has a thorough understanding of the issues and the challenges advisors face every day. With the knowledge and ability to help guide the advisor ready to move up to the next level, Jeff provides the tools and techniques proven to yield results.

Through practical applications and real world examples, Jeff is able to share with advisors not only the what, but the how and "how to". In bridging the knowing and doing gap, Jeff is able to deliver a clear understanding of superior practice management techniques as well as the process to immediately apply the lessons learned.

Whether dealing with existing clients or attracting new ones, Jeff's goal is for every Financial Professional to have the confidence, competence and the framework necessary for their practice to soar. Advisors will leave Jeff's programs with the knowledge of how to truly set themselves apart from the competition while dealing with all aspects of client retention and acquisition.

Primary Areas of Expertise

- Sales Management and Coaching
- Sales Process and Performance Planning
- Relationship Management
- Wealth Management Sales Skills and Technical Knowledge
- Lifetime Income Planning
- Business Owners Issues
- Practice Management
- Risk Management/Insurance

Education

Bachelor of Arts in Communication, University of Georgia

Designations, Affiliations and Licenses

- Certified Financial Planner
- Licensed Agent – Life, Health
- Series 6, Investment Company and Variable Products Representative