



KELLY M. LEWIS CFP[®], J.D., LLM

Advisor

ABOUT

Kelly graduated from the Georgetown University Law Center with a Master's of Law (LLM) degree in Tax and Estate Planning. Before that she graduated from the University of the District of Columbia Law School with her Juris Doctor (JD). After graduating, she worked as a licensed attorney in the Washington D.C. area. In 2013 she moved back to Corning to pursue an extremely exciting and rewarding career as a financial advisor.


Kelly currently focuses her talents on an underserved portion of our population: women! Women make up over 50% of the US population and are one of the fastest growing groups of investors, but the financial industry is just starting to take this changing environment into account. Women have their own unique financial and lifestyle challenges throughout their education, careers, and retirement. Together we can plan for a thriving and fulfilling life.

CONCENTRATIONS


Financial Planning
Tax Planning
Retirement Planning
Employee Benefits Planning
Investments
Insurance Review
Estate Planning
Elder Planning

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EDUCATION

- L.L.M. in Taxation -Georgetown University Law Center
- J.D. -University of the District of Columbia Law School
- B.A.—Culture & Communications — Ithaca College
- Certificate in Estate Planning - Georgetown University Law Center
- Certificate in Behavioral Finance- Duke University
- Certified Financial Planner (CFP[®])
- Licensed attorney in NY & NJ



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