






CONTACT

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EDUCATION/CREDENTIALS

Certified Financial Planner® Practitioner /
Member Financial Planning Association

Certified Trust and Fiduciary Advisor /
Member Institute of Certified Bankers

Cannon Financial Institute – Trust School

American Institute of Banking Graduate

Empire State College, BS Business Mgmt.
& Economics

Corning Community College Business
Adm. Degree

BRANDI B. GRAHAM

CTFA, CFP®

Senior Advisor

ABOUT

After completing her first career in banking, Brandi made the decision to begin a second career with JGUA. She joined the firm in May of 2007 with 25 years of banking and management experience. Brandi earned her bachelor's degree in Business Management and Economics from Empire State College. She is also a Certified Financial Planner® Practitioner and a Certified Trust and Fiduciary Advisor.

Brandi's background as an Audit Manager, Senior Trust Officer and Vice President Bank Operations, have given her a keen eye for detail and vast array of knowledge which are natural compliments to the firm's holistic and coordinated approach to the financial planning process. Her analytical and organized style enables her to communicate complex concepts to clients and help families achieve their financial goals.

CONCENTRATIONS

Long Term Financial Planning
Trust and Estate Planning
Retirement Planning
Employee Benefits Planning
Tax Planning
Risk Management



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