




# KELLY M. LEWIS CFP<sup>®</sup>, J.D., LLM


*Senior Advisor*

## CONTACT

 lewisk@jgua.com

 (607) 936-3720 x276

 www.JGUA.com

 P.O. Box 1424  
Corning, NY 14830

## 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<sup>®</sup>)
- Licensed attorney in NY & NJ

## 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



John G. Ullman  
& Associates, Inc.  
COMPREHENSIVE WEALTH MANAGEMENT SINCE 1978