






CONTACT

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EDUCATION

Alfred State College, BBA in
Financial Planning

Texas Tech University, MS in
Personal Financial Planning and
a Graduate Certificate in Life-
Centered Planning

CERTIFIED FINANCIAL
PLANNER™

Retirement Income Certified
Professional®

Series 65 - Uniform Investment
Adviser Law Exam

JAKOB BROST, CFP®, RICP®, MS

Advisor & Charlotte Branch Manager

ABOUT

Jakob graduated from Texas Tech University with a Master of Science in Personal Financial Planning and a Graduate Certificate in Life-Centered Planning. Before that, he graduated from Alfred State College with a Bachelor of Business Administration in Financial Planning. During his time at Alfred State, he played for the club hockey team, in addition to acting as the team's president for two years. Throughout his education, he had several financial internships which helped to give him a better understanding of the industry as a whole. After he completed his education, Jakob joined the firm as an associate advisor in the beginning of 2023 and earned his CERTIFIED FINANCIAL PLANNER™ designation in 2024. Additionally, he added his Retirement Income Certified Professional® designation in 2025.

Throughout Jakob's upbringing, he was constantly involved in different sports, whether that was hockey, lacrosse, or soccer. All of this time spent in sports taught him how to excel as a leader and effectively communicate within a team. In addition, he learned the importance of hard work, time management, and being accountable.

In his free time, Jakob enjoys spending time with family and friends at the lake in the summer and spending time skiing on the slopes in the winter.

CONCENTRATIONS

Financial Planning
Asset Allocation
Education Planning
Estate Planning
Tax Planning/Preparation



John G. Ullman
& Associates, Inc.

COMPREHENSIVE WEALTH MANAGEMENT SINCE 1978