



JESSICA MITCHELL, CFP®, MBA

Senior Associate Advisor

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EDUCATION

Alfred State College, Bachelor
of Business Administration

St. Bonaventure University,
Master of Business
Administration

CERTIFIED FINANCIAL
PLANNER™

ABOUT

Jessica is a dedicated Senior Associate Advisor with a strong commitment to helping individuals and families build, preserve, and grow their wealth with confidence.

With a client-centered approach, she focuses on understanding each client's unique goals, risk tolerance, and long-term aspirations to develop personalized financial strategies tailored to their needs.

Jessica assists clients in the areas of retirement planning, investment management, tax-efficient strategies, estate planning, and wealth management to simplify complex financial concepts and provide clear, actionable advice.

Jessica has the ability to view situations from many lenses and presents multiple options to solve unique challenges and situations. She believes that informed clients make better financial decisions and she prioritizes education and transparency in every relationship.



John G. Ullman
& Associates, Inc.

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