



Jerry Benedict is a graduate of Widener University and has a degree in Finance as and an MBA from West Chester University. Jerry was the 2008 recipient of the Widener University Finance Student of the Year Award and the recipient of the 2008 Commencement Finance Prize. He was also a nominated and selected panelist for the 2013 Morning with the Rising Stars Event, a NAIFA Greater Philadelphia event.



**Gerard Benedict**  
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Jerry holds designations through The American College as a Certified Financial Planner, Chartered Financial Consultant, and Chartered Life Underwriter. He has been with Creative Financial Group since 2009, is a financial services representative who holds a FINRA Series 6, 7, 63, 65 securities registration and has his Life, Accident and Health Insurance License.

Jerry provides his clients a consultative and pro-active approach to the financial planning process. Him and his team are able to assist them in the following areas:

#### **Private Client Services**

- Comprehensive Fee Based Financial Planning
- Asset Management
- Wealth Transfer, Trusts, and Estate Planning
- Legacy Planning: Preparing the Next Generation
- Wealth Protection and Risk Management
- College Education Funding Strategies
- Long-Term Care Planning
- Charitable Giving Strategies
- Retirement Planning Strategies

#### **Corporate Client Services**

- Business Continuation & Estate Conservation Strategies
- Executive Compensation Plans
- Employee Benefits
- Risk Management
- Qualified Retirement Plan Strategies
- Key Person Planning

#### **About CREATIVE**

CREATIVE is dedicated to helping entrepreneurs and business owners accomplish their lifetime and legacy goals. Founded in 1955, CREATIVE delivers comprehensive financial solutions to a select group of executives, business owners and other successful individuals and companies who have unique planning and wealth management needs. CREATIVE offers the confidence that comes with the strength and stability of one of the industry's leading firms.