## Jacob Stewart, JD

Jacob owns a tax consulting business and is also a managing attorney for Inter Vivos, PLLC, a national estate planning law firm.

Prior to working with Inter Vivos, Jacob spent several years working as the chief tax and asset protection consultant for a large asset-protection company. In that capacity, Jacob has helped thousands of medical professionals and other small business owners across the country reduce their tax burden and protect their assets. Jacob has worked with hundreds of CPAs, attorneys, and financial advisers all over the country and has had unique exposure to a large variety of strategies.

Jacob obtained his Juris Doctorate degree from George Mason Law School and has also worked as an assistant editor for Aite Group, a prominent financial research company based out of Boston.

Because of his education and experience, Jacob can look at a client's situation from multiple perspectives, and incorporate asset protection, tax considerations, estate planning, and financial planning into his recommendations to clients.

In addition to his law degree, Jacob has a FINRA Series 65 (investment adviser) certification and has both life and health insurance licenses.

Jacob and his wife have six beautiful children. Jacob loves spending time with his family, serving in his church, reading, playing racquetball, hiking, and spending time outdoors. He also speaks fluent Spanish and French.

In his role at Foundation Financial Planning, Jacob can be tagged in as needed to offer our clients **expert estate and tax advice that's integrated with their financial plan.**

If deeper services are needed, he is available to help your clients implement estate plans through his law firm and can be engaged for full tax planning sessions.