



# Biography of Jonna Keller

## PROFESSIONAL BACKGROUND

Jonna Keller is the Managing Partner and Owner of First Security Investment Inc. (F.S.I.), a premier investment and financial services firm in Sarasota, FL. Her firm is renowned for its expertise in managing and safeguarding family wealth through various financial instruments, including insurance, estate planning, and portfolio investments. Unlike traditional advisors, Keller's philosophy transcends the mere sale of financial products. She is dedicated to offering tailored financial strategies that align with her client's goals, influenced by current market dynamics and effective risk management techniques.

With a career spanning over 25 years, Keller has consistently placed her clients' interests above transactional profits. Her steadfast commitment to integrity has cultivated enduring trust and confidence among her clients, guiding them securely through their financial endeavors.

Keller's approach is characterized by her commitment to providing high-net-worth clients with impartial, independent financial advice. She excels in demystifying the complexities of wealth accumulation through customized, accessible financial plans crafted from her extensive experience and deep knowledge of the investment landscape.

## **EXPERTISE**

Family Wealth Planning—Keller excels in advising clients on optimal wealth enhancement and intergenerational transfer strategies. Her methods include asset protection trusts, wills, estate distribution planning, and tax-efficient insurance solutions, considering potential life contingencies and long-term care needs.

**Tax Reduction Planning:** Keller's firm is crucial in minimizing tax burdens throughout clients' careers and into retirement. Strategies include balancing gains and losses and optimizing the timing of 401K and I.R.A. distributions to manage future tax implications effectively.

Retirement Income Planning - She and her team personalize retirement income strategies to sustain future livelihoods through informed investment choices and robust asset management.

**Estate Planning:** Keller assists clients in valuing their diverse portfolios and recommends tax-efficient asset distribution strategies, ensuring a smooth transfer of wealth across generations.

## **ACCOMPLISHMENTS**

Jonna Keller holds prestigious credentials, including Accredited Investment Fiduciary (AIF®) and Chartered Retirement Planning Counselor (CRPC®), with Series 7, 63, and 65 securities registrations. Her leadership has been recognized through numerous awards and positions, including:

- AssetMark National Community Inspiration Award (2017)
- Invest In Others Charitable Foundation National Honoree (2017)
- 941 CEO Greater Goods Award (2016)
- Chair of the Women's Leadership Council (2018)
- Panel Member and Speaker at the U.S. National Committee for U.N. Women (2013)
- Vice President and Board Member of T.R.E.K. (Tech Readers Enrich Kids)

## **PHILANTHROPY**

Jonna Keller is profoundly committed to philanthropy, particularly with organizations like the Boys and Girls Clubs of Sarasota County, which honored her with the Beverly Burton New Board Member of the Year Award. Her community involvement extends to numerous charities, focusing on enhancing education, arts, and culture among underserved youth. Her efforts have significantly benefited organizations such as the Westcoast Black Theatre Troupe, Gulf Coast Community Choir, and Embracing Our Differences.

## PERSONAL LIFE

In her personal life, Keller cherishes spending time with her family and friends, which provides her with essential support amidst her demanding career. She enjoys traveling, staying active, and cooking, particularly with local seafood and produce, embracing the coastal lifestyle to its fullest.

Jonna Keller continues to lead with conviction. She guides her clients through the complexities of financial planning with a compassionate and meticulous approach, always ensuring their interests are at the forefront of every decision.

## Gallery



