



Jennifer Strong, CFP® AEP®

Financial Advisor, Principal, Kate Capital Group - A Registered Investment Advisor

Experience

Financial Advisor, CFP®, AEP®, Principal

Kate Capital Group

Feb 2025 - Present 1 year 1 month

Westlake Village, California, United States

Trustee

Special Needs Trust

Apr 2007 - Present 18 years 11 months

Financial Advisor, CFP®

Eagleson Arndt Financial Advisors, LLC

Jan 2024 - Feb 2025 1 year 2 months

Thousand Oaks, California, United States

Adjunct Professor

California Lutheran University

Jul 2024 - Dec 2024 6 months

Thousand Oaks, California, United States

Financial Planning, CFP® Board Approved Course, Financial Planning Minor

Wealth Advisor, MB&T Advisors

Montecito Bank & Trust

Mar 2016 - Jan 2024 7 years 11 months

Financial Advisor

Merrill Lynch

Nov 2014 - Mar 2016 1 year 5 months

Westlake Village, CA

Senior Personal Banker

Bank of America

Jan 2010 - Nov 2014 4 years 11 months

Financial Consultant

Santa Barbara Bank and Trust

Jul 2006 - Jun 2009 3 years

Education

Education

UC Santa Barbara

Bachelor's Degree Psychology

1988 - 1992

Licenses & Certifications

Accredited Estate Planner (AEP)

National Association of Estate Planners & Councils

Issued Jul 2025

Certified Financial Planner (CFP)

CFP Board

Issued Sep 2020

Credential ID 360292

Life and Health Insurance License

California Department of Insurance

License 0F86692