

# Jason E. Farris, CFP®, CAP®

## Partner



**Email:** [jfarris@waller.com](mailto:jfarris@waller.com)

Jason joined the firm in 2004 and became a partner in 2011. As a partner, Jason is involved with the strategic planning of the firm. He is also responsible for managing client relationships and conducting review meetings. Jason also serves on the firm's Investment committee.

Jason and his wife, Abby, are both from Northeastern Ohio and graduates of The Ohio State University. Abby works in the Dublin City School district, as a Primary Numeracy Coach. With any free time, they enjoy traveling and exercising, as well as being around family, friends, and their pets. Jason, Abby and their son, Gus, reside in Clintonville.

Jason won the 2016 Columbus Business First *Forty Under 40* award for his hard work at Waller Financial, and his contributions to the community



### Education & Designations

- Bachelor of Science in Business Administration
- The Ohio State University, Major in Finance
- Graduated with honors, Cum Laude
- CERTIFIED FINANCIAL PLANNER™ Professional
- Chartered Advisor in Philanthropy®



### Professional Memberships

- Financial Planning Association of Central Ohio
- Society of Financial Service Professionals



### Community Connections

- OSU Alumni Association
- Faith Mission of Ohio
- Life Care Alliance/ Meals on Wheels
- Big Brother Big Sisters of Central Ohio

[www.Waller.com](http://www.Waller.com)

941 Chatham Lane, Suite 212  
Columbus, Ohio 43221

**P** 614-457-7026

**F** 614-457-9011



801 Laurel Oak Drive, Suite 710  
Naples, Florida 34108

**P** 239-325-8505

**F** 239-325-8506

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