



Jeffrey W Otway

Financial Advisor
CFP[®]

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Office information

9540 W 144th Pl
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708-966-4118

After starting my career as an educator, I devoted myself to be a financial advisor to help individuals and families develop financial strategies. With more than 10 years' industry experience, I have had the pleasure to work with countless individuals to help them achieve their financial goals. Holding true as a lifelong learner, I recently obtained the CFP[®] certification to help better serve my clients best interests.

My practice is centered around meeting with individuals, families and business owners who are looking for a long-term partnership that is built around trust and education. I not only focus on investments, but I help clients sort through the tough financial decisions when starting a business, planning for retirement, making estate considerations, preparing for the unexpected and saving for education. Once I have identified why you are investing, then I will be able to work with you using an established process that is tailored to your specific needs. Furthermore, I will partner with your CPA and attorney to ensure that your legal, estate and tax needs are taken into consideration.

Kelly Sol, our senior branch office administrator, has been a dedicated invaluable member of Edward Jones for an impressive 25 years. Kelly has a deep-rooted commitment to exceptional client service and fosters lasting relationships with our clients.

I am married to my beautiful wife, Laura, who is a 24-year cancer survivor and is an incredible mother to our daughters, Quinn, Holly and Kendall. Outside the office, I enjoy playing in a rock-and-roll cover band named Cellar Door, tending to my garden, being a hockey fanatic, travelling, reading presidential biographies and enjoying time with my friends and family. I have been a proud resident of this area all my life and plan to see my children grow up in a community that has so much to offer. I am always ready to listen and lend a helping hand to help you and your family achieve your financial goals with confidence.

Sincerely,

Jeffrey W. Otway

Branch Team

Kelly Sol
Sr. Branch Office Administrator

Work History

Edward Jones
November 2020 - Present

TD Ameritrade
June 2018 - October 2020

Education

Saint Xavier University
Bachelor of Arts

Investments and services

At Edward Jones, we work with you to understand your financial priorities and why you're investing. You'll experience the convenience of working with one dedicated financial advisor, using an established process to create personalized financial strategies, backed by advice, tools and resources to help you reach your goals. And we'll continue to partner together to help your strategy stay on track. We offer a comprehensive line of financial solutions and services in addition to the traditional investments you expect from a financial advisor.

Retirement and college savings

- Retirement accounts
 - Traditional IRA
 - Roth IRA
- Education savings accounts
 - 529 college savings plans
 - Custodial accounts
- Brokerage accounts
- Edward Jones Advisory Solutions®

Business owners

- Business credit cards
- Plans for you
 - SEP IRA plan
 - Owner-only 401(k) Plan
 - Owner-only Defined Benefit Plan
- Plans for your employees
 - 401(k) plans for your employees
 - SIMPLE IRA
 - 403(b) plans
 - 457 plans
 - Safe Harbor 401(k)

Wealth strategies

- Edward Jones Guided Solutions®
- Edward Jones Advisory Solutions®
- Edward Jones Charitable Gift Fund (a donor-advised fund)
- Trust Company
- Client Consultation Group

Investments

- Stocks
- Bonds and fixed income
- Mutual funds
- Exchange-traded funds (ETFs)
- Fixed income unit investment trusts (UITs)
- Certificates of deposit

Insurance

- Life insurance
- Long-term care insurance
- Long-term disability insurance

Annuities

- Fixed annuities
- Income annuities
- Variable annuities

Cash and credit

- Credit cards and loans
 - Personal line of credit (margin loan)
 - Personal credit cards
 - Debit cards
 - Business credit cards
- Reserve line of credit (contact a financial advisor for details and availability)
- Savings accounts
- Check writing

Convenient account features

- Direct deposit
- Dividend and income reinvestment
- Electronic funds transfer
- Mobile check deposit
- Monthly investing program
- Online Access

Important information concerning the investments and services offered at Edward Jones can be found at [edwardjones.com/investments-services](https://www.edwardjones.com/investments-services).

To learn more, call today.



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Edward Jones: Working to help keep you secure

The relationship between you and Edward Jones is built on trust. A critical part of this trust involves protecting your accounts and personal information. Edward Jones takes this responsibility seriously.

How Edward Jones helps protect you

Here are just a few of the multiple layers of security measures that Edward Jones has in place:

- **Fraud detection:** Several of the firm's departments monitor transactions for suspicious and unusual behavior.
- **24/7 systems monitoring:** Edward Jones' Technology division uses state-of-the-art tools and resources to constantly monitor for unusual or suspicious activity.
- **Extensive system protection tools:** The firm uses industry-leading antivirus, anti-malware, defensive firewall barriers, intrusion prevention and detection, digital forensics and investigative tools. Edward Jones also leverages multiple layers of encryption that render stolen data unusable.
- **Intelligence gathering:** Edward Jones analyzes real-time intelligence on cyber threat activity across the country from the FBI and U.S. Secret Service, as well as the Financial Services Information Sharing and Analysis Center, to protect its systems against emerging threats.
- **External confirmation:** Outside security companies conduct comprehensive assessments of the firm's information security systems several times each year to confirm they meet the highest standards.
- **Employee training:** All Edward Jones employees complete annual training on information security and the latest scams to ensure they are up-to-date on how to spot fraudulent activity and safeguard client accounts and information.

- **Restricted access:** Edward Jones restricts access to client information based on employees' roles and clearance levels.
- **Latest advances in security:** The firm's Information Security department constantly researches best practices across various industries and adds new tools to protect your personal information and financial transactions.
- **Multifactor authentication:** This feature helps prevent someone from accessing your account, even with your user ID and password. Each time you log in to your account, you will be asked to enter your login information and a unique code will be sent to you via text. You will never be asked to provide your unique code from anyone!

How you can help protect your Edward Jones account

Security alerts

You can choose from the following security-related alerts:

1. Password change
2. Email change
3. User ID change
4. Locked user ID (due to too many failed password attempts)

Sign up for text alerts by going to **Settings** in Online Access and clicking on **Manage Phone/Text**.



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