APELLA
Advice for Life

Meet Jason Gentile, CFP®

Director of Financial Planning, Senior Financial Advisor

Phone: 860-734-2072

Email: jgentile@apellacapital.com

Designation: CFP®

Why do you believe in what you do?

I think everybody should have access to financial planning, primarily because money is a big cause of anxiety for many people. Gaining an understanding of what to do with your money and how to plan for your future can reduce a lot of stress. As an advisor, I can actually see the relief in a client's face and body language when I'm delivering a plan. What people really want to know is that they're going to be okay, and being able to reassure them and give them confidence in the future is very satisfying.

What distinguishes you from other financial advisors?

I've worked very hard to become an exceptional and active listener. I try to understand on a deep and fundamental level what my clients are saying to me, and the subtext that can help me recognize the fears and concerns that may not be on the surface but influencing their behavior. Educating and sharing knowledge are important, but you have to listen and understand first. And of course, I believe in the importance of putting together plans that serve not just clients' goals but their values as well.

What do you enjoy the most about working with Apella?

I worked on my own for over a decade at another company, and it's a joy to have the additional resources here, particularly talented colleagues with complementary skills that we can combine to enhance client outcomes and improve our clients' financial circumstances.

It's also great to have colleagues to discuss ideas and serve as a sounding board. I really enjoy feeling like I'm part of a team.

What's your proudest professional achievement?

I was enormously proud to earn the Certified Financial Planner (CFP) designation. I started in 2007-08 by doing a course through the College for Financial Planning. It was during the financial crisis, my second son has just been born, we had just bought our first house. Things were very chaotic and stressful, and the CFP program is very challenging. It's the highest standard in our industry, and I would be proud to have earned it under any circumstances, but with everything I was going through at the time it feels like an even more significant achievement.

What's your favorite place in the world?

I'd have to say Maine. We've had so many great vacations there, in different parts of the Shoreline Community. We usually go every August for a week or two. We love going to the beach there, kayaking, hanging out with the kids, swimming. The other is Fenway Park. I'm a huge baseball fan.

APELLA
Advice for Life

Meet Jason Gentile, CFP®

Director of Financial Planning, Senior Financial Advisor

Phone:
860-734-2072

Email:
jgentile@apellacapital.com

Designation:
CFP®

Jason fell in love with the advisory business while he was still in college, and after an internship was offered a full-time position with a financial firm even before he graduated. Now, with nearly two decades years of experience as a financial advisor, he still gets enormous satisfaction from helping clients reach their long-term financial goals.

Jason believes in delivering financial advice rooted in a disciplined and academic investment approach along with the clear identification of clients' goals and objectives. As a Certified Financial Planner® professional, he focuses on educating clients on the importance of risk management and diversification.

He helps remove the confusion, frustration, and intimidation inherent in investing by offering simplicity and transparency through comprehensive financial planning with an emphasis on retirement income planning, including Social Security required distributions and other tax-efficient retirement distribution strategies. He also has significant expertise advising businesses on their company retirement plans.

Now the Director of Financial planning and a Senior Financial Advisor with Apella, Jason joined Symmetry Partners, Apella's sister firm, in 2006. Prior to joining Symmetry, he was with Advest Inc./Merrill Lynch as a Senior Registered Associate. Jason is also active professionally as a member of the Financial Planning Association and Board and has served as the president of the Connecticut Financial Planning Association.

When he's not at work, you'll often find Jason on the baseball diamond or in the gym. He volunteers extensively in several local youth sports leagues and serves as a coach for a recreational basketball league. Jason is also vice president of the local baseball association. Most of his free time revolves around his sons, and if they're not playing in a league, they're likely to be kayaking or swimming. Jason also teaches adult education courses on retirement planning.

Jason has a BA in Business Management from Eastern Connecticut State University. He also holds the Certified Financial Planner (CFP) designation.

He lives in Hebron, CT and has 3 sons: Noah, Gavin, and Nolan.