

Janet Grace Attard, MBA
Financial Advisor, Series 7, 63, 65
J Oliver Maxwell, LLC, RIA, License 155656
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Jan is an Advanced Wealth Management and Retirement Planning Services specialist. Jan possesses keen knowledge of diverse investment strategies for wealth accumulation and diversification. Jan examines both company fundamentals and technical indicators. Jan focuses with integrity, and dedication to assist businesses, individuals, and families to employ long-term plans to diversify a portfolio, minimize risk, maximize gain, to live a life of significance. Asset accumulation and diversification pave the way to growth and preservation of capital. The careful performance of qualified investing occurs with a collaborative a team of professional associates who are knowledgeable investment strategies to guide investment growth. Jan provides fiduciary guidance, trust, and confidence, with daily investment decisions to align her clients (individuals and businesses) in a collaborative way to become long term partners and associates for life.

Client Profile

Families/Estates, Small Businesses, Corporations, Foundations/Endowments, Non-Profit Organizations, Hospitals/Medical Groups, and Large Structured Family Trusts.

Services

Investment Management, Consulting, Laddered Portfolio Strategies, Structured Diversified Equity Portfolios, Bonds, ETFs, Mutual Funds, Technical Analysis, and Insurance Products.

Community Involvement

Janet is a docent at the Blackhawk Auto Museum
Janet is a volunteer at the Wheelchair Foundation
Janet acts as CASA and Volunteer County Mediator
Jan is forming a 501C3 to empower Ukraine children.

Circles of Influence

Hospital Executives, Physicians, Attorneys, Nurses, Nouveau Riche, Business Leaders, Accountants, Architects, Realtors, Business Owners, Non-Profits, and Corporations.

Professional Experiences

Position: 1998-2000.

Paine Webber, San Francisco, CA #415-774-3324

Stockbroker, Investment Services, Retirement Planning, and Wealth Preservation.
Series 7, 63, 65, Ca Insurance License, Technical Analysis, Fundamental Analysis.

Position: 2000- 2001

Round Hill Securities, Alamo, CA, Stockbroker, Registered Representative
Stockbroker, Investment Services, Retirement Planning, and Wealth Preservation.
Series 7, 63, 65, Ca Insurance License, Technical Analysis, Fundamental Analysis

Position 2001- 2002

E-Planning Securities, Sacramento, CA, California

Stockbroker, Investment Services, Retirement Planning, and Wealth Preservation.
Series 7, 63, 65, Ca Insurance License, Technical Analysis, Fundamental Analysis

Position: 2002- 2003

Electronic Trading Group, Manhattan, NYC, NY., Proprietary Trader.

Position: 2003- 2004

Sutton Investments, Lakeport, CA.

Stockbroker, Investment Services, Retirement Planning, and Wealth Preservation.
Series 7, 63, 65, Ca Insurance License, Technical Analysis, Fundamental Analysis

Position: 2004-2005

Ridgeway and Conger, Stockbroker, Newtown, Connecticut

Stockbroker, Investment Services, Retirement Planning, and Wealth Preservation.
Series 7, 63, 65, Ca Insurance License, Technical Analysis, Fundamental Analysis

Position: 2005 - Present

J Oliver Maxwell, LLC, Registered Investment Advisor

Investment Services, Retirement Planning, and Wealth Preservation

Series 7, 63, 65, Ca Insurance License, Technical Analysis, Fundamental Analysis

EDUCATION

Georgetown University, Washington, DC 20007

School of Health Sciences, BSN May 28, 1978

Golden Gate University, San Francisco, CA

Golden Gate School of Law (1st Year Law)

School of Finance- Technical Analysis

2001

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Ashford University, Clinton, Iowa

Master of Business, Finance

2011

Concord Purdue Law School

Present