



Michael Jageler QKC, QKA
PRINCIPAL

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“ My favorite book is A Storm of Swords in the Game of Thrones series by George R.R. Martin. I will never be able to attend another wedding without thinking of this book!

Michael joined the firm in May 2021 as a Principal and the Head of Retirement Plan Services. He has spent the last 25+ years designing and administering retirement plans for hundreds of businesses in New England. He helps businesses navigate the complex IRS rules and regulations to design a retirement plan that meets the objectives of the business owners and provides a vehicle for the employees to meet their retirement goals.

Outside The Office

Michael spends his time away from work with his wife and children. On the weekend, you can always find him at the local hockey rink, baseball field, track, or curling club, cheering his children's athletic teams. In the rare instances he is home, you can find him on the couch with his wife, fighting for control over the TV remote.

Education

- Bachelor of Science in Business Administration with a dual concentration in Finance & Insurance and Management Information Systems (MIS) from Northeastern University.
- Qualified 401(k) Consultant (QKC) from the American Society of Pension Professionals and Actuaries (ASPPA)
- Qualified 401(k) Administrator (QKA) from the American Society of Pension Professionals and Actuaries (ASPPA)

Professional Affiliations

- American Institute of Certified Public Accountants
- Massachusetts Society of Certified Public Accountants
- American Society of Pension Professionals and Actuaries

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