



Jeffrey George, CIMA, C(k)P, CPFA

- Wealth Management Advisor, Managing Director, Merrill Lynch
- Inspira Health Network Board Member, Inspira Hospital Board Chair
- Greater Vineland Chamber of Commerce, Past President
- Former Army Captain, Company Commander 101st Airborne Division, Operation Iraqi Freedom

Current Professional Experience

Jeff is the senior partner in the George Bernstein Mulholland Wealth Management Group at Merrill. The GBM group is an eleven-member team that helps families and business owners with crucial financial decisions. Jeff oversees the team's business retirement plans and co-leads the team Investment Committee overseeing over \$1.9bn in client assets. He holds the Certified Investment Management Analyst designation, the Certified 401k Planner designation, and the Certified Plan Fiduciary Advisor credential. Like his other team members, they are highly credential in specific areas of client focus in order to serve a broad range of investors in an ever-changing financial environment.

Current Charitable Activities

Jeff has served on the Greater Vineland Chamber of Commerce Board of Directors as the Past President. Jeff served for 14 years as a board director including 9 on the executive board.

Jeff has served on the Inspira hospital board and various committees. As a community servant, Jeff believes that the health of the community is critically important to its success. Jeff is currently on the Finance, Investment, Quality, and Governance Committees for Inspira Health Network System Board of Directors. He has served as the Chairperson for the Hospital Board, the Quality and Safety Committee and recently chaired the foundation's Cardiac Expansion Development Campaign.

Jeff's a member of the Union League of Philadelphia, and volunteers as Veterans Initiative Fellowship Program Mentor, and a member of the Armed Service Council.

Former Professional Experience

Jeff worked for 5 years as a Branch Manager at Merrill Lynch. The office included 21 advisors and ten staff roles. The office completed over \$30mm of annualized revenue. After running the Atlantic City office, He spent three years as a regional Sales Manager from Delaware to South Jersey. He oversaw advisor training and business development activities for over 120 Financial Advisors. Jeff also served on Merrill's Financial Advisors Council to Management.

Prior to entering financial services, Jeff served as a Company Commander in the 101st Airborne Division during Operation Iraqi Freedom. His unit comprised of over 100 medics, doctors, and various specialties providing medical support to 4,000 US and coalition forces. Jeff also held positions as an executive officer of an Air Ambulance Company and a Medical Planner in the 101st Airborne Division Staff. His first assignment was as a Blackhawk MEDEVAC pilot and team leader in South Korea for 24 months.

Jeff and his wife (Valerie) have owned of multiple Cold Stone Creamery Franchises. Valerie and Jeff have three children. JD is a police officer in Raleigh NC. Jeffrey and Jackie are both college students.

Past Charitable and Non-profit Activity

Jeff has coached youth hockey and soccer. He was a founder, and later Board Director of Jersey Surf World Class Drum and Bugle Corps. He has also served in various leadership roles at his church. He held an activity committee chairperson role at the Union League of Philadelphia as the Chairman of the Unions Leagues Veteran's Initiative.

Awards and Commendations

- 2023, 2024, 2025 Forbes Best in State Financial Advisor
- 2024, 2025 Barron's Top 1,500 Financial Advisors
- City of Philadelphia 2017 Veteran of Influence
- 2016 Merrill Lynch David Brady Award for Community Service
- Bronze Star Medal, Meritorious Service Medal (multiple), and other decorations appropriate for Rank in Military Service
- Aviator, Airborne, Air Assault, and Expert Field Medic Badges