



Jake Sheehan, CLU, TEP, FEA

Insurance Advisor, Life Design Systems



Jake Sheehan and his team specialize in guiding business owners and professionals through the intricacies of insurance, tax, estate, and retirement planning. With a focus on simplifying complex financial landscapes, Jake developed a unique modeling system, providing clients with fresh perspectives on their current situations and potential life scenarios. His mission is to streamline decision-making, enabling clients to redirect their focus towards what brings them joy.

Bringing a wealth of expertise, Jake holds designations such as Chartered Life Underwriter (CLU), Trust and Estate Practitioner (TEP), and Family Enterprise Advisor (FEA). Committed to client comprehension, he employs visual narratives to convey intricate structures, fostering a deeper understanding for both clients and professionals. Active within the industry, Jake has been a CALU member since 2014 and currently contributes to the STEP Membership Committee. He is grateful for the support of ChatGPT in crafting his bio.