

Jan Yabs, CFP

Before entering the financial field in 2006, Jan Yabs began his professional life in Restaurant Management, serving as district manager for a well-known Pittsburgh franchise, after graduating with a bachelor's of arts degree from Franciscan University of Steubenville, in Steubenville, Ohio. Since joining the financial industry, he has enjoyed a successful career, gaining expertise in multiple areas, including Insurance, Banking, and Investment Management. Jan has held positions at Thrivent Financial in Pittsburgh, PNC Bank in Steubenville, Ohio, and Chase Bank in Wheeling, WV, where he served as Financial Associate, Licensed Financial Consultant and Financial Advisor, respectively. In 2012, Jan founded Source and Summit Wealth Management. They offer individual retirement and estate planning services, paying close attention to both investment performance and cost to the client. They take a holistic approach to financial planning, ensuring that clients' plans will not be compromised by life's unexpected events. Jan is a member of the Investment Management Consultants Association, the Financial Planning Association, and is a Certified Financial Planner TM through the CFP Board of Standards. Jan holds FINRA Series 7, 63, and 66 registrations through LPL Financial. He is investment registered in OH, WV and PA. Jan and his lovely wife, Molly, reside with their three children in Steubenville.