



J.R. Toland

President and CEO
Financial Advisor

After 29 years as a financial advisor at Savage & Associates and a tenure on the management team, JR Toland was elected to the role of President and CEO. As a financial advisor, his area of expertise involved assisting small business owners and corporate executives secure comfortable retirement plans. He specialized in designing tax-efficient business succession plans and executive benefit plans that attract and retain the best and brightest people. By helping business owners design a plan for retirement that does not solely rely on the sales of the business, and making sure that their estate plans were designed to minimize taxes, he built a loyal clientele. JR's experience in helping small businesses transferred fluidly to his new role as the ambassador of growth for the financial services and insurance firm. JR's vision for Savage & Associates encompasses leadership, innovation, and customer service. He is focused on the client, with an emphasis on improving operational efficiency and execution to maximize a company's potential, leading to significant growth.

Education

J.R. graduated from the University of Toledo in 1985, with a bachelor's degree in finance. He has received his Chartered Life Underwriter (CLU®) designation along with his Series 6, 7, 24 and 63 securities registrations.

Personal

J.R. and his wife, Beth, reside in Holland, Ohio. They are very proud parents of four children: Nicole, Troy, Hallie, and Scott. JR strongly believes in giving back to his community. He has served his local church as the Fundraising Chairman and was President of the Athletic Board for seven years. Additionally, JR has been involved with the mission of the Multiple Sclerosis Society, where he has served on numerous fundraising committees and held the position of Chairman of the Board. Currently he is serving on the Central Catholic High School Board of Directors in Toledo, where he just completed his term as Chairman of the Board.

Registrations:

Securities Registered in FL, GA, IL, IN, ME, MI, NC,
OH, OK, WI

Registration Series 6, 7, 24 and 63

Designation:

CLU® (Chartered Life Underwriter)

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savageandassociates.com