



Elier Peraza, CFP®

Director of Financial Services
JY WealthCare, LLC

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SERVICES

Annuities
Disability Insurance
Investments and Securities
Life Insurance
Long Term Care
Personal Financial Planning

LICENSES

FINRA Series 7 & 66
California Insurance License 0K42603

COMMUNITY INVOLVEMENT

Leadership San Jose, Alum
MACLA/Movimiento de Arte y Cultura
Latino Americana, Board Member
Stand Up For Kids, Volunteer

EDUCATION

Bachelor of Science – Biochemistry &
Molecular Biology, University of Havana

“I’m all about building close relationships and collaborating with my clients to find the best strategies and solutions.”

I joined Johanson & Yau in 2016 with more than a decade of experience as a financial advisor, including prior positions with 1st Global Capital Corp. as Supervising Director and Financial Advisor in their Practice Consulting Department.

I thrive on opportunities to help clients achieve the outcomes most important to them by clarifying their values, vision, goals and expectations. My focus includes customized retirement income solutions, portfolio design, long term care, disability protection and charitable donations using tax optimized strategies.

A native Cuban, I spend my free time exploring nature and finding new restaurants in the Bay Area – La Bodeguita del Medio in Palo Alto is a favorite. A hike to the top of Mission Peak, a bolero, arroz con pollo and a mojito are the best ingredients for a perfect weekend.