



Employee Benefits Services Group.



Jeff Poling

Managing Director

U.S. Employee Benefits Services Group

Jeff Poling is the Director of Wealth Advisory Services for The Retirement Plan Company, LLC (TRPC). He is also a Managing Director of U.S. Employee Benefits Services Group, the parent company of TRPC. Jeff began his career in 2008 as a trust associate with First Freedom Trust, where he gained experience in client services, operations, administration, and consulting. He later joined ProEquities Inc. where he became a fully licensed Investment Advisor, and where he learned and sharpened his client relationship skills, and furthered his investment knowledge.

Jeff joined TRPC in 2017 where he is a relationship manager and handles all aspects of quarterly Investment reporting. He serves as lead consultant for client matters requiring research and guidance on plans on the RIA platform. Making sure the plan trustees are comfortable, and taken care of from a fiduciary standpoint is one of Jeff's main items of expertise. He is also involved in yearly RIA compliance.

Jeff is a graduate of Cumberland University in Lebanon, TN, where he earned an academic and football athletic scholarships, and majored in Business Administration and also studied Finance and Marketing. He has FINRA Series 7, Series 63 and Series 65 registrations, and Life & Health and Property and Casualty insurance licenses. Jeff is also involved in two major charitable organizations that help children.