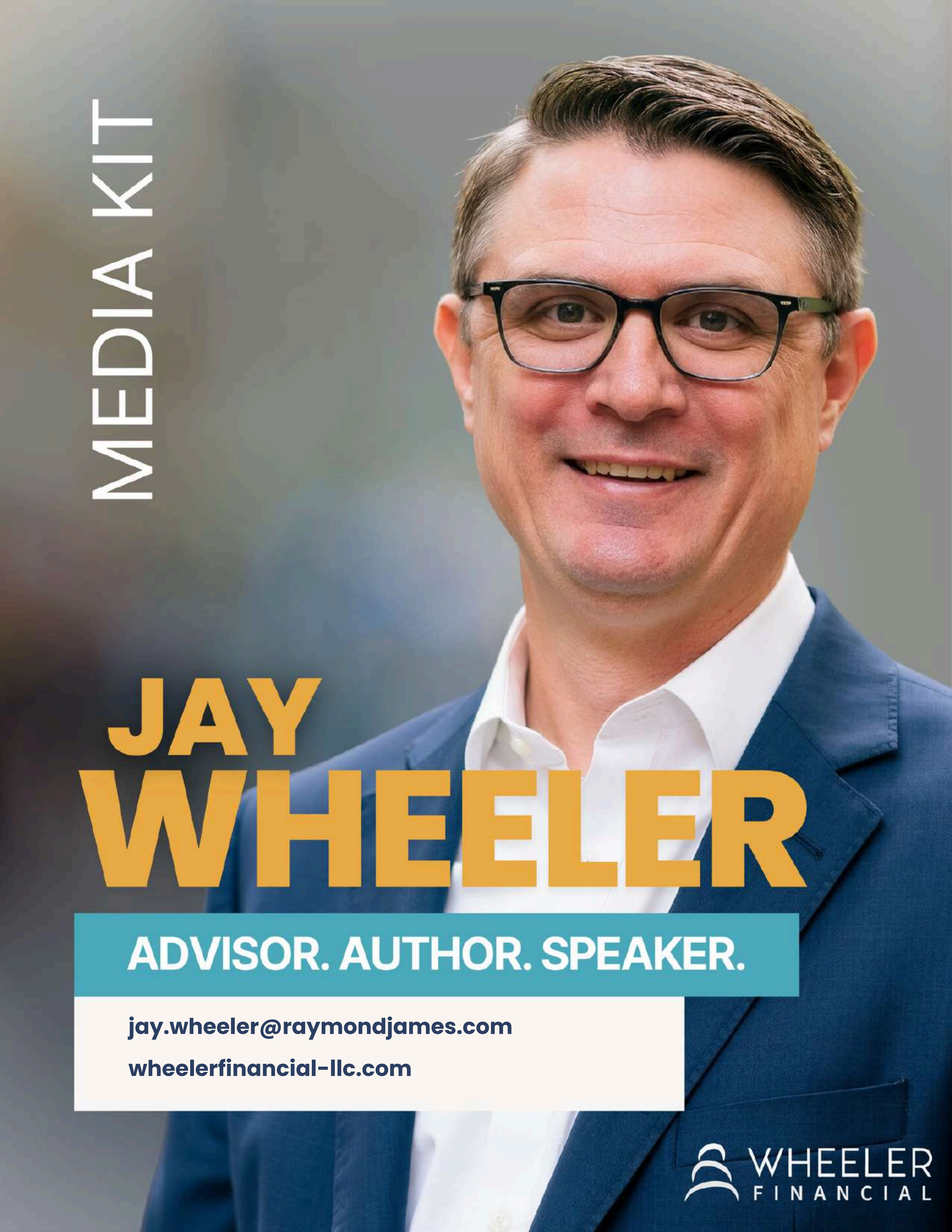
MEDIA KIT



JAY WHEELER

ADVISOR. AUTHOR. SPEAKER.

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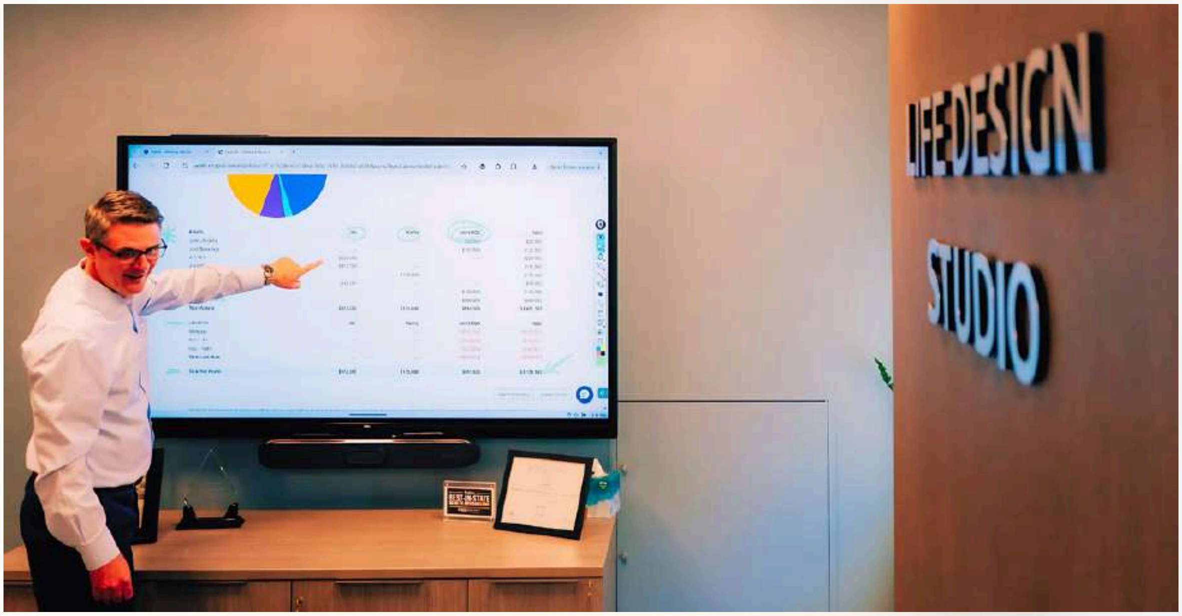
Hi, I'm JAY!

I help people take the surprise out of life's biggest financial moments—whether by speaking to a packed room, guiding a family through a financial plan, or leading a hands-on workshop.

Rooted in behavioral finance and driven by a deep belief in values-based planning, my work combines clear guidance with real empathy and fun. This media kit offers a closer look at my speaking topics, workshop facilitation, and book — all centered on helping people make confident, purposeful decisions about money and life.



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Jay Wheeler redefines financial planning by **Putting Life First**

Jay Wheeler helps people design financial lives that reflect their values, anticipate the predictable, and reduce the stress of being caught off guard.

As President of Wheeler Financial, Jay is known for blending smart strategy with human understanding. His book, *Un-Surprise Me*, challenges the idea that life's biggest financial disruptions are unknowable. Instead, Jay helps people anticipate life's predictable changes — things like our kids growing up, aging parents, career transitions, home repairs, and major life milestones — and guides them to prepare with intention and clarity.

Rooted in behavioral finance, Jay's approach emphasizes values-based planning and an honest look at how we make decisions. He believes financial choices aren't about chasing what's "right" in theory — they're about finding what's right for you personally.

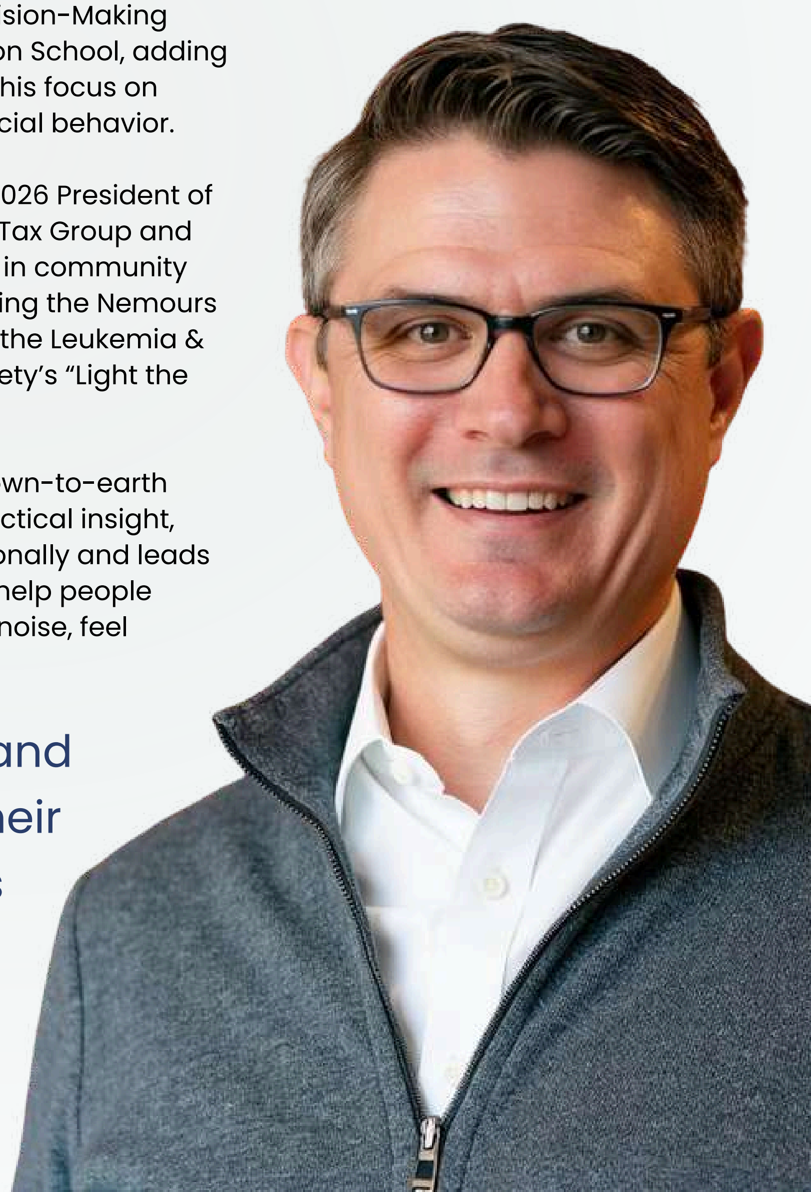
His work has made him a sought-after voice for those who want financial advice that feels personal, grounded, and forward-thinking.

Jay holds the Accredited Investment Fiduciary® and Behavioral Financial Advisor designations and is a graduate of the University of Delaware. He also earned a certificate in Behavioral Economics: Consumer Choice and Decision-Making from The Wharton School, adding further depth to his focus on real-world financial behavior.

He is the 2025–2026 President of The Wilmington Tax Group and has been active in community initiatives including the Nemours Golf Outing and the Leukemia & Lymphoma Society's "Light the Night" Walk.

Known for his down-to-earth delivery and practical insight, Jay speaks nationally and leads workshops that help people cut through the noise, feel confident in their plans, and make financial decisions that support the life they actually want to live.

Outside of work, Jay is a dedicated family man. He enjoys trail running, fishing, hiking, going to the beach, and cheering on the Phillies with his wife, Lindsay, and their kids, Grady and Anna.



As a financial advisor, speaker, and author Jay helps people align their finances with what truly matters — **without stress or complexity**.

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ABOUT JAY'S BOOK

★★★★★

"Candid, clear, concise, and comprehensive. Has all the hallmarks of successful strategic planning — practicality, pragmatism, and executability!"

CHRISTOPHER P MCPADDEN, MAJ. GENERAL, US ARMY

Demystify Your Path to Financial Clarity

Your future shouldn't catch you off guard.

Wondering if you're on track financially? You're not alone. Most of us crave clarity — reassurance that we're making smart choices with our money and setting ourselves up for a secure, fulfilling future.

In this refreshing, story-driven guide, Jay Wheeler brings humor, heart, and hard-won insight to the world of personal finance. Through his On-Purpose Method®, he helps readers trade anxiety for action — and create a financial plan that reflects their values, goals, and lifestyle.

Whether you're starting from scratch or fine-tuning your plan, *Un*-Surprise Me! will help you approach your financial future with clarity, confidence, and a little more fun.

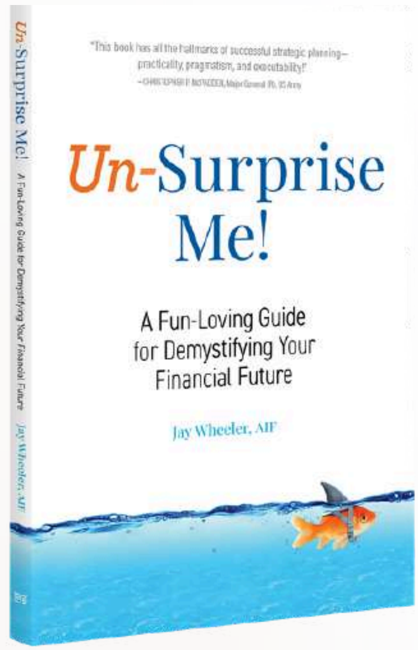
CLICK TO ORDER

"Unlike like any other financial book I have ever read. Helps people at any age recognize they don't have to be victims of their own bad habits."

KEVIN NOLAN, Author of Organizational Muscle

"***Masterfully addresses the elephant in the room: the relationship between values, health, and wealth — understand this, and the rest falls into place naturally."***

SCOTT FULTON, President of Home Ideations LLC
Author of *WEALTHSPAN: More Years, More Moments, More Money*



An easy-to-read guide written in a storytelling style to help readers:

- **Identify core values** and how to make aligned financial decisions
- **Recognize financial surprises** that shouldn't be surprising
- **Learn how to overcome past experiences** that shape ongoing financial decisions
- **Develop intentionality** in financial decision-making

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Jay Delivers Financial Talks with Heart, Humor, and Clarity

Known for his warm, relatable style and thought-provoking sessions, Jay Wheeler creates space for honest conversations around finances, purpose, and the big transitions we all face.

As a speaker and workshop facilitator, Jay blends behavioral finance with real-life insight to guide audiences through questions they don't always realize they're carrying: *Am I prepared for what's coming? Does my financial plan reflect who I really am? What's next — and how do I get there with intention?*

His workshops and talks are interactive, story-driven and rich with actionable tools people can actually use. Whether he's speaking to professionals navigating change or individuals planning their next chapter, Jay leaves audiences feeling more confident, clear, and equipped to make decisions that align with their lives — not just their ledgers.

From corporate teams to community groups to national conferences, Jay brings a thoughtful presence and energizing perspective to every room he walks into.

'THOUGHTFUL. WARM. INTERACTIVE. PRACTICAL.'

[Click here to watch Jay's highly-praised TEDx talk.]

Audience Takeaways

- A fresh, values-based approach to money
- Clarity on what matters — and how to fund it
- Insight into their own financial habits and blind spots
- A mindset shift from pressure to purpose
- Real-world actions they can use right away

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WORKSHOP TOPICS

Un-Surprise Your Financial Life

Money isn't just math—it's life planning. In this interactive workshop, Jay helps participants rethink their approach to money using a values-based framework and insights from behavioral finance. Drawing from his book Un-Surprise Me, he shows how many of life's biggest "surprises" are actually predictable—and how planning ahead can reduce stress and create more meaningful choices.

Attendees will learn how to anticipate key life transitions, understand their own decision-making patterns, and take practical steps to align their financial lives with what matters most. With relatable stories, hands-on tools, and a fresh perspective, this workshop leaves people feeling clear, confident,
and ready for what's next.

Length: 1–3 hours, customizable

The Human Side of Retirement

Retirement isn't just a financial shift — it's an identity shift. In this engaging and thought-provoking workshop, Jay guides participants through the emotional, social, and psychological sides of retirement planning. Through guided discussions and reflective exercises, attendees explore what excites them, what concerns them, and how to navigate the evolving relationships and routines that come with this major transition.

Blending behavioral insight with real client stories, Jay brings a warm, grounded approach to help participants define what gives their life meaning — and how to carry that forward. Whether retirement is around the corner or already here, this session empowers people to build a life that's deeply fulfilling, not just financially, but personally.

Length: 3 hours

Break Up with the Professional You Thought You Were Supposed to Be

What if the breakthrough you're looking for isn't about doing more — but letting go?

I n this energizing workshop, Jay shares his personal journey of shedding the "advisor" he was trained to be and embracing who he truly is. That shift opened the door to unexpected growth — writing a book, building a tech tool, and landing a TEDx talk.

Participants are invited to do the same: to question outdated expectations, trust their instincts, and lead with purpose. Through guided self-reflection and candid conversation, this workshop helps professionals unlock deeper authenticity, fulfillment, and innovation in their work and life.

Length: 2 hours

THOUGHT LEADERSHIP

A Growing Public Voice on Money, Purpose, and Planning

Jay Wheeler is helping shift the conversation around money — from something transactional to something personal, intentional, and actionable. His perspective blends behavioral insight with lived experience, making complex topics feel practical and deeply human.

His work now reaches wider audiences through **TEDx, Forbes**, **YouTube**, and beyond — resonating with those seeking clarity and meaning over quick fixes.

Jay welcomes opportunities to contribute through writing, interviews, panels, and collaborative content.

Jay served as a featured panelist at the New York Stock Exchange for a product launch — an opportunity to contribute to a high-level industry conversation. He is available for panels, forums, and financial leadership events.

Opportunities to Collaborate

- **Podcast Guest:** Jay brings story-driven, practical insight to conversations on money, mindset, and life transitions.
- **Guest Columnist:** A *Forbes* contributor, Jay writes with clarity and warmth on financial decision-making and purpose.
- **Panelist & Roundtables:** Jay offers a grounded, practical voice in high-level industry discussions, such as at the NYSE.
- **Video & Content Partner:** Open to video collabs and aligned content projects. Jay also shares insight on his YouTube channel.
- **Book & Resource Features:** Jay's book, *Un-Surprise Me!*, is available for features, book clubs, and resource spotlights.
- **Newsletter & Audience Collabs:** Jay has a highly-engaged, growing audience of professionals, planners, and purpose-driven individuals.

Select Media Clips

Watch:
Jay's TEDx Wilmington talk

Read:
Jay's *Forbes* article, "How to Make 'Bad' Financial Decisions"

Subscribe:
to Jay's YouTube channel for insights on Life Design and financial planning.

FIVE-TIME WINNER (2022-2026)

Forbes

BEST-IN-STATE WEALTH ADVISORS

SHOOK® RESEARCH

2026

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WHY WORK WITH JAY

With more than 25 years of experience in business and leadership — including 15 years in financial planning — Jay combines real-world insight with trusted expertise. A five-time Forbes Best-in-State Wealth Advisor (2022–2026) and longtime member of the Raymond James Executive Council, he's known for making complex financial topics feel clear, human, and actionable.

WHO JAY WORKS WITH

Jay partners with organizations, teams, and individuals who are ready to think differently about money — especially women navigating transitions, healthcare professionals balancing purpose and pressure, and corporate executives seeking clarity and confidence in their financial decisions.

Whether through keynotes, workshops, or one-on-one advising, he brings a grounded, approachable style that helps people connect financial decisions to what matters most.

WHAT YOU CAN EXPECT

For Workshops & Keynotes
An experience that feels more like a conversation than a lecture. Jay keeps audiences engaged, grounded, and thinking differently about money — with real stories and humor. He leaves audiences with actionable takeaways they can use right away.

For Advisory Clients
A personalized, values-driven approach tailored to your life and goals. Whether you're a woman in transition, a healthcare professional balancing purpose and pressure, or an executive reimagining success, Jay helps align your finances with your larger Life Design. Expect thoughtful guidance, clear communication, and a collaborative process that builds confidence in every decision.

BOOK JAY TO SPEAK

Jay would love to join your next event with an engaging, story-driven session that helps people rethink money, plan with purpose, and leave with tools they'll use. Available for keynotes, workshops, panels, and custom sessions.

LEARN MORE ABOUT WHEELER FINANCIAL

Interested in becoming a Wheeler Financial Advisory client? Learn how Jay and the team help individuals and families align their finances with what matters most. Contact Wheeler Financial to start the conversation.

LET'S CHAT

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DISCLOSURE STATEMENT

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Raymond James' Council membership is based on prior fiscal year production. Requalification is required annually.

The Forbes Best-in-State Wealth Advisors 2026 ranking, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. This ranking is based upon the period from 6/30/2024 to 6/30/2025 and was released on 4/7/2026. Those advisors that are considered have a minimum of seven years of experience, and the algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 52,043 nominations, roughly 11,302 advisors received the award. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Compensation provided for using the rating. Raymond James is not affiliated with Forbes or Shook Research, LLC. Please visit https://www.forbes.com/best-in-state-wealth-advisors/ for more info.

These rankings are not indicative of an advisor's future performance, are not an endorsement, and may not be representative of individual clients' experience.

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