Oxford Harriman | Private Wealth Management

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Jeffrey Kaplan has spent more than 45 years helping individuals, families, business owners, and professionals make thoughtful decisions about their money, their businesses, and their futures. His work has always been grounded in a simple belief: good advice starts with trust, and trust is built by putting the client first.

In 2001, Jeff co-founded KKA Financial with a vision to provide clients with trusted advice and exceptional service. He built the firm around the principles that continue to guide his work today—integrity, expertise, and long-term relationships. With a foundation in accounting and tax planning, Jeff understood early on that successful financial planning is about more than investments. It is about seeing how the pieces fit together and helping clients make decisions that preserve what they have built and prepare it for what comes next.

That perspective continues to shape how Jeff serves clients. He specializes in tax-efficient strategies, estate planning, and wealth preservation, working closely with business owners, professionals, and multigenerational families. His approach is deliberate and personal: understand where a client is today, understand where they want to go, and build a plan that connects the two.

Jeff holds the CERTIFIED FINANCIAL PLANNER™ professional designation, along with CPA and JD credentials. He earned his B.B.A. in Accounting from the University of Michigan and his J.D. in Law from Wayne State University. After more than four decades combined in accounting and financial planning, his philosophy remains much the same as it was when he started: listen carefully, provide thoughtful advice, and always put the client's interests first.

Advisory services offered through Oxford Harriman Private Wealth Management, an SEC registered investment adviser.