

Jeremy Kaplan, CFP®, CPA

President of KKA Financial & Senior Managing Director



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Jeremy Kaplan began his career in technology consulting, working in system integration and product management. That experience taught him to think in systems, solve complex problems, and look for better ways to connect individual pieces into something that works as a whole. Over time, he found himself drawn to another kind of problem: helping people make better decisions about their money and their future.

That path led Jeremy back to school, where he earned a Master's in Accounting from New York University. Accounting gave him a deeper understanding of how financial decisions work beneath the surface, while financial planning gave him the opportunity to use that knowledge in service of people and families.

Today, Jeremy is President of KKA Financial. Since joining the firm in 2023, he has focused on helping individuals and families build, protect, and transition wealth through comprehensive planning and investment management. The work is not simply about managing a portfolio. It is about understanding the full picture and making sure the pieces—investments, taxes, retirement, risk, and long-term goals—work together.

That integrated approach is central to how Jeremy works. His background in technology and accounting gives him both a technical

perspective and a big-picture view, allowing him to incorporate modern tools and thoughtful strategies into personalized financial plans. Tax efficiency is an important part of that process, helping clients make decisions with an understanding of both what they may earn and what they ultimately get to keep.

Jeremy holds the CERTIFIED FINANCIAL PLANNER™ professional designation and is a Certified Public Accountant (CPA). He earned his B.A. in Informatics from the University of Michigan and his M.S. in Accounting from New York University. He also holds FINRA Series 7 and Series 66 registrations.

The philosophy is straightforward: understand the details, never lose sight of the bigger picture, and use every available tool to help clients move toward what they want their money to accomplish. For Jeremy, financial planning is ultimately about creating clarity around important decisions and helping families build a financial life that can grow, adapt, and endure.

Outside of work, Jeremy enjoys playing and watching sports, exploring technology, traveling, experiencing different cultures, and discovering great food and restaurants.

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