



# SARAH E.J. COLLIER, J.D., CFP®

*Advisor*

## ABOUT

Growing up on a small hobby farm, Sarah learned early the value of discipline, responsibility, and hard work. She earned her Juris Doctor from Albany Law School, where she explored a broad range of legal disciplines including family law, trusts and estates, personal injury and liability, agricultural law and regulations, and business law. This legal foundation, paired with her continued financial education at JGUA, gives Sarah a distinctive perspective on the complex decisions clients face. She believes deeply in a personalized, relationship-driven approach to financial planning—one that helps clients gain clarity, make confident decisions, and feel prepared for both the expected and the unexpected.

Since joining JGUA in 2018, her natural curiosity and commitment to continuous learning have shaped her development as an advisor. Sarah builds long-standing, trusted relationships by understanding each client's unique circumstances and implementing thoughtful, mutually agreed-upon strategies that support their short- and long-term goals. She has a particular appreciation for strategic tax and estate planning and how these areas integrate with long-term investing and retirement planning.

Sarah is also an active member of her community and contributes her expertise as a board member and volunteer for various agricultural, animal-welfare, and equine organizations. She shares her knowledge through presentations on topics such as general estate planning and specialized financial planning for horse owners and equine business professionals.

Sarah has a hobby farm of her own now, which serves primarily as a retirement home for her beloved equine companions.

## CONCENTRATIONS

- Trust & Estate Planning
- Financial Risk Management
- Insurance & Liability Reviews
- Financial Planning for Equine Enthusiast
- General Legal Research




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## CONTACT

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## EDUCATION

The College at Brockport,  
B.S., English & Political  
Science

Albany Law School, J.D.  
designated with a  
Concentration in Equine,  
Racing, and Gaming

Certified Financial Planner®

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Investment Adviser Law  
Exam