

Jose A. Caldera



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Jose graduated from the Cheshire Academy in 1969 and continued his education at the Utica College of Syracuse University in Utica, N.Y., New York University, N.Y., and The American University in Washington, D.C. He received his B.A. in Business & Economics from the University of Geneva.

Over the years, Jose held positions in both the finance and insurance industry working for companies such as Citibank, The Inter-American Development Bank in Washington, D.C., Comerica Bank in Florida, Jefferson Pilot Financial Group, MetLife, and currently with the Principal Financial Group. In these positions, he has maintained a high degree of professional excellence and is well known and regarded by both peers and clients. Jose caters to business owners and affluent individuals and prepares both estate and business succession planning scenarios.

He currently resides in Boca Raton, Fl. with his wife Elena, where they have lived for the last twenty-two years. They have one son and two daughters. He has been affiliated with The Boca Chamber of Commerce, The Venezuelan Chamber of Commerce, and The Cheshire Academy and has had a fifty-year family membership with The Westchester Country Club in Harrison, N.Y.

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