



Barbara Holian Kong, CFP®, MBA

Director of Financial Services
JY WealthCare, LLC

Review my background on
[FINRA's BrokerCheck](#)

SERVICES

Annuities
Disability Insurance
Investments and Securities
Life Insurance
Long Term Care
Personal Financial Planning

LICENSES

FINRA Series 6, 7, 63 & 66
California Insurance License #0A26929

PROFESSIONAL MEMBERSHIPS

Financial Planning Association
Professional BusinessWomen of
California
Santa Clara County Estate Planning
Council
Silicon Valley Financial Planning
Association

COMMUNITY INVOLVEMENT

Friends of San José Public Libraries

“Peace of mind is not just a slogan. It’s the centerpiece of our business and informs every interaction we have with our clients.”

I joined Johanson & Yau in 2004 and lead our wealth management practice.

I help clients examine their financial status and create strategies to set and achieve their life goals. With over 26 years of insurance experience, I introduce clients to life, disability and long-term care coverage, as well as annuities. I’m an Investment Adviser Representative in California CERTIFIED FINANCIAL PLANNER™ professional.

Long-time residents of Berryessa, my husband and I enjoy weekend hikes along the beautiful trails of Alum Rock Park.

EDUCATION

Bachelor of Arts – Business
Administration, Arizona State University
Master of Business Administration –
Arizona State University