



Jacqueline E. Keener, CPA
Finance and Systems Manager
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Creating efficiencies and serving her community.

For Jackie, the best day would involve creating more efficient processes and spending time serving her community both at work and at home.

“I enjoy creating efficiencies to save us time on the routine tasks, so we can focus on the individual needs of each of our clients,” she says.

Jackie is known for her organizational mindset, helping support team members to think about both the big picture and the minute details to work through tasks and projects. She makes sure questions are answered and concerns are resolved – when you connect with Jackie you know she will follow through until it’s completed.

As a CPA with tax experience, Jackie is also a member of the Domani Wealth’s tax support team; she frequently coordinates tax-related investment data with CPAs and outside tax firms. Her experience working in tax has been a plus as she manages the tax cost basis data for client investments.

Jackie works closely with Domani Wealth’s Investment Strategy Group to ensure that all investment data and classifications are accurate and properly reflected in client portfolios. This data is important since it is used on a daily basis for trading decisions and client reporting. She remains constantly aware of stock splits, mergers, dividends, and other related information to make sure our financial systems are accounting for these changes accurately. Jackie has a deep understanding of all aspects of client management, so she can properly maintain systems and accurate data.

Her responsibilities include managing the firm’s systems and the client billing process. Jackie is passionate about using technology and finding way to better utilize our systems. She assists with developing and documenting processes to improve the client experience. Jackie also supports compliance initiatives and coordinates the firm’s rotational internship program.

First working as a tax accountant, Jackie knew she enjoyed the work but was looking for something more challenging. Taking over the day-to-day reconciliation of thousands of client accounts became something she loves to puzzle out. It gives her pride to know the value she’s bringing to the table when clients and other team members know they’re reviewing accurate data.

The Domani Wealth core value Jackie most resonates with is curiosity, she says. “I enjoy asking questions and having conversations. The more you can learn the more your eyes are opened and the better you can understand the needs around you.”

Professional Accreditations & Education

- Certified Public Accountant
- BS, Accounting and Business Administration, Lebanon Valley College

- Pennsylvania Institute of Certified Public Accountants
- Lancaster Young Professionals

Professional Memberships

- American Institute of Certified Public Accountants

Community Involvement (current and prior)

- Classroom and Symposium Volunteer, Junior Achievement
- Letter Writing and Craft Team, Soldiers Angels