MENU

Helping others pursue their future goals!

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For nearly 30 years, I have dedicated myself as a financial advisor in developing long-term mutually beneficial relationships with my clients built on trust, hard work, and fun. I believe in helping others assess and pursue their financial goals while enabling them to participate in the management of their personal finances. My mission is not only to service my clients wealth management needs, but also make the investment/planning process most pleasant & educational so that clients are informed and comfortable with what has been implemented.

On a personal level, I strive to keep my education at the forefront so that I can deliver the most current and accurate advice to my clients. My background includes earning a Bachelor of Arts Degree in Economics and Accounting at Claremont McKenna College in Claremont, California. Throughout my years in the financial services industry; I have studied and obtained several accreditations including: the AIF®, CLU®, ChFC®, CMFC®, and LUTCF® designations. In addition, I have acquired the following Licenses: Series 7, 63, 65 and the California State Insurance Licenses (CA #0760528). Continuing education provides me with the knowledge and confidence to improve my clients portfolios and investments. It gives me the skills of a well-practiced coach. I can help you gain a better understanding of the financial concepts behind insurance, investing, retirement, issues surrounding estate planning, and wealth preservation. My goal is to teach investors to clearly understand the opportunities and potential rewards that are available when a proactive approach to personal finances is taken.

On a professional level, I take pride in my ability to listen to my clients wants and needs, explain complex ideas in a clear manner, and maintain a deep understanding of your values and priorities. Once goals are established, I customize and build an effective roadmap to align clients with their vision of the future. I invest the time to research the best and most responsible way to structure and manage each individuals investments, assist in the development of appropriate financial strategies for the current market, and help with an individuals wealth through proper risk management programs.

I enjoy being a resource for my clients and using my Wealth Management/Retirement Planning background to coach them toward pursuing their financial goals.