



## One of OC's Most Trusted Financial Advisors

- IRA and 401k Rollovers
- Retirement & Income Planning
- Principal Protection
- Asset Allocation
- Estate & Tax Planning
- Life/Health Insurance

Call for your free consultation now (949) 851-4969

## Our Services



Pacific Crest Financial is a provider of insurance and retirement planning services. Our goal is to provide complete solutions, and help our clients improve their financial lives. We offer personal and comprehensive services.

We offer a broad spectrum of retirement products and services and our clients are our first priority.

## About Us

Gregory McCloskey is the principal and owner of Pacific Crest Financial Services. Greg earned his B.A. in English from [UCLA](#) and has worked in the Financial Services Industry for over 25 years. Specializing in Retirement, Insurance, and Estate Planning, Greg helps families and individuals improve their long-term financial health. Greg and his wife Gordana, have two sons, Lukas (13) and Lance (10), and reside in [Irvine, California](#).

**Greg holds several Licenses and Certifications, listed below:**

- Certified Financial Planner – [CFP Board of Standards](#)

## Contact Us



### **Pacific Crest Financial**

Call or email now for an office or in-home appointment:

Tel: (949) 851-4969

Fax: (949) 606-9480

Email: [gregorym@pacificcrestfinancial.com](mailto:gregorym@pacificcrestfinancial.com)

- Life and Disability Insurance License, [California Department of Insurance](#)
- Certified Tax-Preparer; [Licensed and Bonded](#)
- Long Term Care Insurance Certification - [California Department of Insurance](#)
- [Registered Notary Public](#)

*Gregory McCloskey - CA Insurance License # 0B72919 [California Department of Insurance](#).*

## **Pacific Crest Financial**

Tel: (949) 851-4969 • Fax: (949) 756-0981 •

Email: [gregorym@pacificcrestfinancial.com](mailto:gregorym@pacificcrestfinancial.com)

Securities and advisory services offered through WestPark Capital, Inc. -  
Member [FINRA](#) / [SIPC](#) / <http://brokercheck.finra.org/>

Pacific Crest Financial and WestPark Capital are not affiliated firms.