

News | Indices

Dow	10318.16	-14.28	4:31pm
Nasdaq	2146.04	-10.78	5:30pm
S&P 500	1091.38	-3.52	5:01pm

Enter Symbol

Symbol Name

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- › Advisor Homepage
 - › Key Links
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Welcome



As your private wealth advisor I am committed to enhancing your quality of life by simplifying the complex financial issues and reducing the stress associated with making important financial decisions, especially surrounding life changing events.

I partner with your advisors and other professionals to coordinate your personal plans and I provide educational materials to enhance your knowledge about issues surrounding wealth. Through the creation of a prioritized wealth plan, you are capable of enjoying the lifestyle you have earned and be more fully engaged in your core priorities such as traveling, enjoying more time with your family and being more involved in the community.

Business Experience

- **1998 - Present: Morgan Stanley Smith Barney***
Vice President - Wealth Management
Senior Investment Management Specialist /
Financial Advisor
Financial Planning Specialist
Long Beach, CA

Education and Licensing

- Bachelor of Science - Finance
California State University, Long Beach
Long Beach, CA
- Bachelor of Science - Management Information Systems
California State University, Long Beach
Long Beach, CA
- Senior Investment Management Specialist Designation
School of Investment Management
- Financial Planning Specialist Designation
- Guided Portfolio Manager
Hartford, CT
- Series 7 - General Securities Representative
- Series 63 - Uniform State Exam
- Series 65 - Investment Advisory Agent
- Life & Variable Annuity Insurance Licensed
California and Arizona

Services

- Business Planning
- Estate Planning
- Long Term Care Insurance
- Municipal Bonds
- Philanthropic Services

- Wealth Management
- Family Consulting
- Private Banking

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