Your Wealth Management Consultant

Jeffrey Nordin, CFP®, CIMA®, Advisory & Brokerage Services

About Jeff

- 16 years wealth management consulting experience
- FINRA Series 7 and 66
- Certified Investment Management Analyst℠ (CIMA®)
- Certified Financial Planner™ (CFP®)
- Chartered Advisor in Philanthropy (CAP™)
- California life and health insurance licensed
- Member, Financial Planning Association
- California State University, B.A., economics
- Cornell, Johnson Graduate School of Management, M.B.A.

Today, true wealth planning is more than data on paper. It's about asking the right questions and exploring what's really important to clients.

About wealth management consulting

Developing a comprehensive plan requires more than looking at assets. It takes knowing each client's needs and goals, and applying the technical skills necessary to address the complexities of wealth management. That's where our wealth planning expertise helps.

We partner with Financial Advisors to assist in deepening our understanding of client needs and circumstances. We work to implement estate and wealth management planning strategies including:

- Creating an integrated wealth plan
- Allocating client assets appropriately
- Dealing with concentrated stock positions
- Addressing desires for philanthropic giving

Jeff's approach to wealth management

Understanding clients is the key to Jeff's approach to wealth management. He works with Financial Advisors to gain a deep appreciation of their needs and objectives. His process is comprehensive, focused not just on gathering facts and figures, but on understanding personal, family and social goals. Working with this information, he helps Financial Advisors create personalized strategies for their clients.

Jeff serves as both a strategic and technical resource, able to assist from the earliest client interview stage through issue identification, implementation of strategies and review. He brings specific knowledge in the areas of financial planning, taxation, asset management and trust and estate planning strategies.

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