Geoff LaRoche

MBA, CFP®

CERTIFIED FINANCIAL PLANNER™
Financial Advisor

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"My mission is to help you write your best life story through financial and investment services. In today's hectic and busy world, I strive to help professionals, individuals, and families live a simpler and more productive life by managing their investments and ensuring they stay on track as they pursue their financial goals."

PROFESSIONAL

Specialties:

- Retirement Planning Strategies
- Education Planning Strategies
- Estate Planning Strategies
- Investment Management
- Life, Disability, and Long Term Care Insurance

Education, Certifications & Licenses:

- CERTIFIED FINANCIAL PLANNER™ (CFP®) professional
- Master of Business Administration, Portland State University
- Bachelor of Arts in Engineering, Lafayette College
- FINRA Series 7, 63, and 65 registrations through LPL Financial
- Life and Health Insurance licenses in Oregon and Washington

PROFILE

With more than 13 years of experience in the financial services industry, Geoff largely works with successful professionals who seek a simpler and more productive financial life. He strives to serve as an advisor clients can trust to manage their assets and help them with the many financial decisions they face. Prior to joining the Preisz Financial team in 2013, he worked as a financial advisor with Smith Barney and Ameriprise Financial. Geoff is also a member of the internal Preisz Financial Investment Committee.

Born in Toronto, Canada and raised in Washington D.C., Geoff settled in Oregon more than 25 years ago. A true outdoorsman, he is an Eagle Scout, assists with the Boy Scouts and Cub Scouts, and actively volunteers with Mazamas, a local outdoors club. He enjoys a life of adventure with his family, hiking, camping, climbing, surfing, skiing, and more. When not at work or enjoying the outdoors, he enjoys playing guitar.

PREISZ FINANCIAL
Your Future...Our Passion