

Michael A. Preisz

AIF®, CFP®, CLU®, ChFC®

President and Founder

(503) 224-1600, ext.101
michael@preisz.com



*“My passion is helping people
be financially secure.”*

PROFESSIONAL

Specialties:

- Qualified Retirement Plans
- Nonqualified Deferred Compensation Plans
- Business Succession Planning
- Estate Planning
- Life Insurance

Activities:

Board Member, Institutional Retirement Income Council (IRIC)
Member, National Association of Insurance and Financial Advisors (NAIFA)
Top of the Table Member, Million Dollar Round Table (MDRT)
Member, Medical & Dental Advisory Team (MDAT)

Education, Certifications & Licenses:

- Accredited Investment Fiduciary® (AIF®)
- Bachelor of Science in Business Administration, cum laude, Portland State University
- Certified Public Accountant (CPA *retired*)
- CERTIFIED FINANCIAL PLANNER™ (CFP®) professional
- Certified Life Underwriter® (CLU®)
- Chartered Financial Consultant® (ChFC®)
- FINRA Series 6, 7, 24, and 63 registrations through LPL Financial
- Life and Health Insurance licenses in Oregon, Washington, California, and Arizona

PROFILE

Michael leads the team, ensuring the delivery of the firm’s core values, and working closely with businesses, executives, and individuals. With four decades of experience, he combines this experience and his natural ability to understand clients’ concerns in order to implement strategies and help clients feel financially secure.

Michael started his career as a Certified Public Accountant, working with Deloitte, Haskins & Sells, before working for nearly a decade as a Controller and Chief Financial Officer with several companies. In 1987, with the goal of working closely with clients and helping them implement financial strategies, he founded his own independent firm, now known as Preisz Financial.

Michael is a native Oregonian and takes full advantage of the great outdoors. He is a backpacker and runner, having participated for 12 years in the Hood to Coast Relay, the Portland Half Marathon, and other events. He enjoys traveling and spending time with his wife Karen, three children, and four grandchildren. He is proud to support a number of non-profit organizations, including Classic Wines Auction, St. Andrews Legal Clinic, Humane Society of Southwest Washington, Boy Scouts of America, and Pacific Crest Trail Association.



*Securities offered through LPL Financial, Member FINRA/SIPC.
Investment advice and guidance offered through PREISZ Financial,
a DBA for Preisz Associates, Inc., a Registered Investment Advisor
and separate entity from LPL Financial.*