Robert Beswick

CFP®, CLU®, ChFC®

LPL Registered Principal
CERTIFIED FINANCIAL PLANNER™
Financial Advisor

(503) 224-1600 x109
bob@preisz.com

"My goal is to provide informative and honest answers to the many complex areas of financial management in order to help clients better understand the opportunities available to them."

PROFESSIONAL

Specialties:

- Investment and Protection Planning
- Trust and Funding Options
- Estate Planning
- Life, Disability and Long Term Care Insurance

Activities:

Member, Sigma Alpha Epsilon

Education, Certifications & Licenses:

- Bachelor of Science in Business Administration and Finance, University of Oregon
- CERTIFIED FINANCIAL PLANNER™ (CFP®) professional
- Certified Life Underwriter® (CLU®)
- Chartered Financial Consultant® (ChFC®)
- FINRA Series 2, 6, 7, 22, 24, and 63 registrations through LPL Financial
- Life, Health, and Variable Annuity licenses in Oregon and Washington

PROFILE

Bob is a Registered Principal with LPL Financial, largely working with business owners, employees, trusts, and fiduciaries. His goal is to help clients understand their financial concerns and opportunities by providing guidance and simplifying complex issues. Bob has more than 35 years of experience in the financial services industry. Prior to joining Preisz Financial, he worked as a representative with Nationwide Financial and Pacific Life, and an Equity Coordinator with Mass Mutual.

Bob is a born and raised Oregonian who is married to his high school sweetheart, Linn. Bob enjoys the outdoors, especially fly fishing for trout and steelhead around the Pacific Northwest.

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