William Preisz

AIF®, CPA, CRPS®

Director, Retirement Plan Services
Shareholder

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"Many people find retirement planning daunting and are unsure of their retirement readiness. My goal is to support our advisors in helping both employers and employees feel at ease that they are on the path to a stable retirement."

PROFESSIONAL

Specialties:

- Qualified Retirement Plan Enrollment, Education and Administrative Support

Activities:

- Boy Scout Troop 150

Education, Certifications & Registrations:

- Accredited Investment Fiduciary® (AIF®)
- Bachelors of Science in Business Administration, Questrom School of Business, Boston University
- Certified Public Accountant (CPA)
- Chartered Retirement Plans Specialist℠ (CRPS®)
- State Securities Law Exams
  - Series 65 – *Uniform Investment Advisor*
  - Series 63 – *Uniform Securities Agent*
- General Industry Exams
  - Series 6 – *Investment Company Products/Variable Contracts Representative*
- State Registrations: Oregon, Washington

PROFILE

William comes to Preisz Financial from a career in accounting and banking. His CPA training brings a high level of attention to detail when offering employee education meetings, enrollment meetings and ongoing plan administrative support.

William graduated from Boston University's Questrom School of Business with major in Business Administration. He started his accounting career in Portland at Moss Adams, LLP before moving on to Controller and CFO positions with several local banks. Providing the most accurate and useful data to plan administrators and participants is his passion.

Outside of the office, William has been a lifelong supporter of the Boy Scouts of America. An Eagle Scout himself, he now leads in the role of Scoutmaster for the troop he participated in as a youth. William feels that Scouting significantly enriched his development as a youth and now endeavors to pay that forward. William also enjoys spending his time with his wife and two young daughters.

PREISZ FINANCIAL
Your Future...Our Passion