

# Tom Davenport

AIF®, CRPS®

**Chief Investment Officer  
Shareholder**

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*"I strive to help plan sponsors simplify their retirement plans and help their employees save for a meaningful retirement."*

## PROFESSIONAL

### Specialties:

- Qualified Retirement Plans

### Activities:

Member, Portland CFA Society

### Education, Certifications, Licenses & Registrations:

- Accredited Investment Fiduciary® (AIF®)
- Chartered Retirement Plans Specialist<sup>SM</sup> (CRPS®)
- Passed CFA Level 1 Exam, 2010
- Passed CFA Level 2 Exam, 2018
- State Securities Law Exams
  - Series 65 – *Uniform Investment Advisor*
  - Series 63 – *Uniform Securities Agent*
- General Industry Exams
  - Series 7 – *General Securities Representative*
  - Series 6 – *Investment Company Products/Variable Contracts Representative*
- State Registrations: Oregon, Washington
- Life Insurance license in Oregon

## PROFILE

Tom ensures that group retirement plan clients receive the robust level of services offered by Preisz Financial. Serving as the team leader for our retirement plan practice, he offers support by ensuring all services are delivered in accordance with their needs. Additionally, he hosts the fiduciary review meetings for plan sponsor clients, provides investment monitoring reviews and assists plan sponsors with reviewing their current recordkeeper's costs and services. While he spends most of his day working with plan sponsor clients, he enjoys providing onsite participant education meetings and meeting with plan participants during 401(k) checkup meetings. Tom is also a member of the internal Preisz Financial Investment Committee.

Prior to entering the industry, he spent several years as a forest firefighter, serving as a squad leader and a senior firefighter with a Forest Service Hotshot Crew. During his time as a firefighter, he assisted with disaster relief for Hurricane Katrina and the Space Shuttle Columbia Search and Recovery efforts. He is proud of the six years he spent as a Wildland Firefighter and believes this unique experience contributes to his ability to help clients remain calm during stressful times and to stay focused on their objectives.

Tom grew up in Eugene, Oregon, where the fall season was spent watching Oregon Ducks football. Today, he lives in Portland with his wife, Christine, and son, Aiden. He and his family enjoy spending time outdoors, cooking together, hosting parties for friends and family and occasionally playing music. Tom and his wife also enjoy traveling abroad.



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