



David J. Sullwold

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Topics:

- Retirement Planning – Today's common issues
- Retirement Income Planning – How to reduce risk
- Understanding Investor Behavior – Common causes of investing mistakes
- Income Tax Strategies to Reduce Taxes
- Insurance 101 – Life, Health, Long Term Care, Annuities
- Intelligent Investing – Investment basics

Having served in the financial services industry since 1987, David works with CPA's, attorneys, families and small business owners to help identify their financial needs, develop strategies which are most appropriate for their circumstances, and help them implement those strategies in the best possible arrangement and time frame. Through both non-fee and fee based financial planning, David's practice focuses on Retirement, Estate and Business Planning, and Employee Benefits Planning.

A graduate of Oregon State University, David has continued his professional education by achieving the Life Underwriter Training Council Fellow, and becoming a Certified Financial Planner[™]. Active in the industry and his community, David is a past president of the Portland, OR, Chapter of the National Association of Insurance and Financial Advisors and continues to serve as moderator of various LUTC classes. He has also been active with the Financial Planning Association of Oregon. He currently serves on the Board of the Cascade Academy Foundation, a local Chapter of the National Academy Foundation focusing on bringing financial services industry academics and internships to Portland metropolitan area High Schools.

David has joined Willamette Financial Group, LLC, as a Financial Advisor, to increase the depth of products and services available to his clients. David's commitment, dedication and professionalism are your assurance of the highest standard of service.

Prior Speaking Engagements

Legacy Health Systems – Legacy Credit Union, Oregon Employees Federal Credit Union, Life Underwriters, E.N.T.R.E. – Entrepreneurial Networking Through Referral Exchange, Take the Lead, West Linn Parks and Recreation Dept., CPA Continuing Education, Oregon Bar MCLE – continuing education for Oregon Attorneys.