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“ IN THE END, I BELIEVE
THAT BUILDING STRONG
CLIENT RELATIONSHIPS
TODAY, WILL ALWAYS
PAVE THE PATH TO A
SUCCESSFUL FUTURE!

JORGE C. ESCOBEDO, CWS®

WEALTH MANAGER

As a financial advisor, Jorge is responsible for assessing client circumstances and providing individualized, highly strategic investment consulting. He guides clients through each financial stage of their life using a goal-based process. This process includes evaluating a client's current financial and life situation while analyzing their needs and assessing their risk tolerance. He then recommends strategies clients can use to pursue their financial goals and objectives. These comprehensive strategies include solutions for current income, money for the future, leaving a legacy, assets allocation, retirement planning, education planning, portfolio management and managing risk with life, liability and long-term care insurance.

EDUCATION

B.B.A., University of Texas at Austin. Currently holds Financial Industry Regulatory Authority (FINRA) Series 6, 7, 63 and 65 License and Registration. Jorge is a Registered Investment Advisor (RIA) and a Certified Wealth Strategist® (CWS).

SERVICE VALUE

With more than 18 years in the financial services industry, Jorge's experience includes banking and wealth management with both retail and commercial clients. His true passion is to help clients develop and clarify their financial goals, then guiding them to implement and monitor the plan necessary to achieve those goals. Jorge takes pride in building strong client relationships based on integrity and honesty, using an educational approach to simplify the client's understanding of the entire process. The comprehensive strategies he implements encompass retirement planning; income needs, growth and preservation; long-term care; and legacy and insurance planning. When not in the office helping clients, Jorge is a devoted family man who spends his free time with his wife and two young boys.