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**“ THE BEDROCK OF
EVERY FINANCIAL PLAN
IS GETTING TO KNOW
WHERE YOUR CLIENT
WAS, IS, AND PLANS
ON GOING. IT’S THE
FIRM FOUNDATION TO
PROPEL US FORWARD.**

ABRAHAM E. MARQUEZ, CWS®

WEALTH MANAGER

Abraham 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 client’s current financial and life situations while analyzing their needs and assessing their risk tolerance. He 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., Finance, University of Texas Pan American. Currently holds FINRA Series 6,7,63 and 65 License and Registration. Maintains Texas Life and Health Insurance Licenses. Abraham is a Certified Wealth Strategist® (CWS).

SERVICE VALUE

As a financial advisor with Cetera Investment Services, Abraham draws on his extensive banking background, which includes working with affluent, high-net-worth individuals as well as mid-size commercial businesses. His 18 years of experience have provided him with the knowledge and skills to understand not only the personal financial needs of his clients, but also the business and economic trends that affect them. He has worked as a financial advisor, senior wealth strategist, and a preferred relationship manager at community, super-regional, and national financial institutions.