SPM SELECT PORTFOLIO MANAGEMENT, INC.
Integrated Wealth Management
A Registered Investment Advisor

DAVID M. JONES, MBA, CFP®

DIRECTOR OF FINANCIAL PLANNING

As a CFP® Professional, Dave's role is to help individuals, families and business owners uncover opportunities to improve their overall financial situation through the implementation of wealth management strategies normally reserved for the highly affluent.

Dave specializes in retirement planning and specifically, how to successfully transition from the wealth accumulation phase to the wealth distribution phase of someone's life.

Dave knows that financial planning is a life-long process that helps his clients take control of their financial future. In order to help create a predictable, sustainable, increasing, lifetime retirement income, he understands it starts with an integrated wealth management plan.

Dave listens closely to his clients to understand their unique goals and objectives. He then identifies any deficiencies in their current financial situation, the financial consequences of those issues and any changes needed to help achieve their specific goals and objectives.

PROFESSIONAL EXPERIENCE

Dave Jones holds the CERTIFIED FINANCIAL PLANNER™ certification and is an Investment Advisor Representative for Select Portfolio Management, Inc (SPM). He is also a Registered Representative (Series 7, 63, and 66) with Securities Equity Group, member FINRA, SIPC, MSRB. After a 24-year career with Hewlett Packard and a life-long focus on his own financial planning, Dave discovered that most advisors used basic approaches targeted for the general public that were not customized for specific situations, goals, time frames or risk tolerance. The basic approaches were very inefficient and lacked the integrated wealth management approach used by the more affluent.

Dave followed his passion for personal financial planning and joined the SPM team as an Investment Advisor Representative and Wealth Advisor and is currently their Director for Financial Planning.

Dave uses a consultative approach to help him create a personalized and comprehensive wealth management plan. He then continually educates his clientele on designs and implementation of some of the most advanced and proven wealth management strategies in the marketplace to help guide them toward achieving their overall wealth management goals.

Within the Community, Dave is a Charter Board Member of the UC Irvine, Paul Merage School of Business, *Center for Investment and Wealth Management*, as well as a member of the Executive Committee for UC Irvine, Paul Merage School of Business, *Dean's Leadership Circle.*

CA Insurance License # 0E65326

EDUCATION

- CERTIFIED PROFESSIONAL PLANNER™ certification
- MBA – University of California, Irvine
- BS - Electrical Engineering – University Of Illinois, Champaign/Urbana

CONTACT DAVE AT:

- 26800 Aliso Viejo Pkwy, Suite 150, Aliso Viejo, CA, 92656
- TEL: (800) 445-9822 / 949) 975-7900 / (949) 900-8176 (direct)
- FAX: (949) 900-8181
- EMAIL: dave.jones@SelectPortfolio.com