

Center for Investment and Wealth Management

UCI Paul Merage School of Business

Advisory Board



Jon Theriault
Principal, MBA, CKA, CFP
RS Crum

[LinkedIn](#)

Jon Theriault is a co-owner of RS Crum and serves as the lead financial advisor for many of the firm's clients. Jon joined RS Crum in 2008 after 13 years of providing specialized financial advisory services to business owners, including running his own mergers and acquisitions firm. As a result, he has a unique understanding of the emotional and complex decisions that impact business owners and families as they contemplate major transitional events. Mr. Theriault is a Qualified Kingdom Advisor™ specializing in providing biblically based financial advice.

Beyond his professional activities, Jon is also a member of the Orange County chapter for the Exit Planning Institute (EPI), the Financial Planning Association (FPA), the National Association of Personal Financial Advisors (NAPFA), and is a Charter Board Member of The Center for Investment and Wealth Management at UC Irvine. Jon regularly donates his time as a volunteer to teach financial management classes and provide advice through his local church, schools and community. He has a Bachelor of Science degree in business administration from the University of Arizona and an MBA with an emphasis in Finance from Pepperdine University.

Jon lives in Seal Beach with his wife and three children. He coaches anything and everything, but right now it's baseball where he manages his son's team in Los Alamitos. With their kids getting a bit older, the Theriault family is planning to travel as much as they possibly can knowing college is just around the corner.