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Jeff has 20 years of experience in the investment advisory services industry. He is a **[Chartered Retirement Planning Counselor](#)**, an **[Accredited Asset Management Specialist](#)**, and an **[Accredited Wealth Management Advisor](#)** through the **[College for Financial Planning](#)**. As a previous financial advisor with Ameriprise Financial for 10 years, Jeff successfully co-managed and serviced approximately \$220 million of client investment assets before starting JST Investment Consulting, RIA (JST) in 2011. Jeff is a **[Fiduciary](#)**, the lead client advisor and business development manager for JST. Holding a double major emphasis business bachelor degree in Finance, Real Estate, Law and Management Information Systems from CSULB (**[Go Beach!](#)**), he is also an active member of the **[National Association of Personal Financial Advisors \(NAPFA\)](#)** and **[Professional Fiduciary Association of California \(PFAC\)](#)**. Most recently, Jeff has joined the **[Association of Financial Educators \(AFE\)](#)**, promoting financial literacy through free financial education workshops to local companies. Jeff resides in Seal Beach, CA with his wife Courtney and 2 young sons, Jack and Chase.