

KRPALEK

FINANCIAL SERVICES

Gregory J. Krpalek, ChFC, CWS, CLU

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Web site : www.wealthadvisorforlife.com

PROFESSIONAL SPECIALTIES:

- Retirement, Investment, Insurance, Estate and Tax Planning Strategies
- Family Comprehensive Wealth Management - 13 Wealth Management Issues
- Life Insurance Planning / Personal and Business
- Supplemental Executive Compensation
- Open Architecture Investment Platforms
- Fee-Based Managed Money Programs
- Charitable Giving Strategies
- Disability Income Replacement / Long Term Care
- Retirement Plans
- Employee Benefits

PROFESSIONAL QUALIFICATIONS:

- Chartered Financial Consultant, (ChFC), The American College
- Chartered Life Underwriter, (CLU), The American College
- Certified Wealth Strategist, (CWS), Cannon Financial Institute, Inc.
- Registered Representative and Investment Advisor, SagePoint Financial, Inc.
- B.S., Business (Finance), Oregon State University
- Professional Experience – Since 1976, working with Attorneys, Accountants, Trust Officers, and other Specialists

PROFESSIONAL AND CIVIC AFFILIATIONS: (Past and Present)

- Society of Financial Service Professionals
- Greater Oregon Chapter, Society of Financial Service Professionals
- Academy of Preferred Financial Advisors, Founding Member
- Willamette Association of Life Underwriters, Past Member
- Willamette Valley Estate Planning Council
- Million Dollar Round Table, Past Member
- AALU – Association of Advanced Life Underwriters, Past Member
- Oregon State University Charitable Planned Giving, Past Chair
- Oregon State University Foundation Board of Trustees, Honorary Trustee
- Oregon State University Beaver Club, Past Board Member
- Albany Area Chamber of Commerce, Past Board Member
- Albany Public Schools Foundation, Past Board Member
- Albany Boys and Girls Club Foundation, Past Board Member
- Mid-Willamette YMCA Foundation Advisory, Past Member
- State of Oregon Sports Hall of Fame
- West Albany Sports Hall of Fame Inductee
- Albany Rotary Club

PERSONAL:

- Born in Albany, Oregon
- Graduated from Albany Union High School and Oregon State University
- Participated in the National Football League: Dallas Cowboys, New Orleans Saints and Green Bay Packers

MISSION:

By offering comprehensive wealth management and other services, we help people make smart money decisions based on their current situation, goals and feelings. Our mission is to provide for our clients sound financial advice and individualized service which will make a positive difference in achieving their financial goals.

Securities and Investment Advisory Services offered through SagePoint Financial, Inc., member FINRA/SIPC and a Registered Investment Advisor. Insurance Services offered through Krpalek Financial Services are independent of SagePoint Financial, Inc.