



Gorge Sustainable Investing

“Protecting Clients Values, Investments & Quality of Life in a Sustainable Customized Approach, Throughout the Columbia River Gorge & Beyond.”

NEWS - For immediate release

David M. Roth Receives Behavioral Financial Advisor™ Designation

White Salmon, WA June 1, 2020 The Kaplan University School of Professional and Continuing Education, in conjunction with Think2Perform®, has awarded David M. Roth the Behavioral Financial Advisor™ designation. The BFA designation is awarded to advisors who have undergone training to learn to help clients make financial decisions using a rational, values-based approach.

Mr. Roth learned to integrate techniques founded in traditional finance, psychology and neuroscience to positively influence clients' spending and saving behavior in the presence of common but challenging emotions. BFA professionals are required to complete 20 hours of continuing education annually.

David along with his wife Michelina co-founded Gorge Sustainable Investing. David is an independent Financial Planner and has been in the financial service industry for more than twenty years. Gorge Sustainable Investing provides comprehensive financial services with a unique focus on ESG and SRI approaches.

“I’ve been committed to taking part in training opportunities and professional development conferences throughout my career because they not only educate me about trends in the industry, but they provide me with tangible solutions to running a better business and meeting my clients’ needs,” Mr. Roth said. *“There has never been a better time in history to help clients manage their portfolios in a values-based approach especially using our specialty of socially responsible, impact and environmentally conscious investing for the good of all people, communities and our Earth. Being able to work with new clients across the nation is very fulfilling.”*

Mr. Roth began his financial services career at Marsico Capital Management. He holds the NASD Series 6, 7 and NASAA Series 63, 66 licenses, along with licenses for Life, Disability, and Long-Term Care Insurance, and the BFA™ designation. Mr. Roth has been active in the Gorge Area community through his leadership roles via numerous civic organizations and boards.

About Think2Perform

Think2Perform has trained thousands of advisors on the concepts of behavioral financial advice across the globe, including the United States, Canada, Brazil, Spain, Germany, Netherlands, Ireland, UK, India, Malaysia, Korea, Australia, New Zealand and Puerto Rico.

About Securities America

Securities America is part of Advisor Group, one of the nation's largest networks of independent financial professionals. Headquartered in Omaha and founded in 1984, supporting approximately 2,600 independent financial professionals. For more information visit <https://www.securitiesamerica.com/>.

Office Phone: 509-398-8428 | Dave@GorgeSustainableInvesting.com Michelina@GorgeSustainableInvesting.com
Main Office: 45 Kida Rd., White Salmon, WA 98672
Additional Office: 3235 Cascade Ave., Hood River, OR 97031

Securities offered through Securities America, Inc. Member FINRA/SIPC.
Advisory Services offered through Securities America Advisors, Inc.
Gorge Sustainable Investing and Securities America are separate entities.