umpqua investments inc.

Shawn P. Gergen, CFP®
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Shawn has been with Umpqua Investments Inc since 2006 as a Vice President-Investments and Financial Advisor, Certified Insurance Counselor, and Certified Financial Planner™. Shawn has over 25 years industry experience, along with 22 years of successful business ownership. Shawn maintains his FINRA series 7, and 66 registrations as well as his life, and health insurance licenses in Oregon, Washington and California #0D87014.

Shawn is interested in the total financial well being of his clients. It is important to properly manage insurance, financing, estate planning and investments. Shawn has expertise in asset allocation and diversification.

Shawn enjoys being on the Board of Directors for the State of Oregon Make-A-Wish Foundation. Shawn is happily married with his wife of 26 years. He has four children and two grandchildren.