umpqua investments inc.

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David joined Umpqua Investments in 2009 along with his assistant Colleen Schriever. With 28 years' experience as a financial advisor, his business is focused on high net worth individuals, business owners, corporate and charitable foundations, and special needs trusts. His specialties include investment management, retirement planning, education planning, insurance planning and liability planning.

David has had a long and successful career as a financial advisor. He graduated from the University of Oregon with a Bachelor of Science Degree in Business Finance and a Bachelor of Arts Degree in German. David maintains his security and insurance licenses.

After college, David moved to Albuquerque where he met his wife Gaylene. David and Gaylene are blessed with two daughters, Madison and Shannon. David's interests include golf, travel and enjoying live music. He is active in his church and performs a variety of volunteer activities.

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