Shawn P. Gergen, CFP®
Vice President-Investments

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Shawn Gergen has been with Umpqua Investments since 2006 as a First Vice President-Investments, Financial Advisor. Shawn has over 34 years industry experience, along with 22 years of successful business ownership. Shawn maintains his FINRA Series 7, and 66 registrations as well as his insurance licenses and CFP® designation.

Shawn believes that frequent communication, planning and portfolio reviews are the best ways to keep clients on track to meet their goals. He is interested in the total financial well-being of his clients. He believes it is important to properly manage investments, financing, estate planning and insurance. After getting to know the client and helping them to define their long-term financial goals, Shawn utilizes the vast resources of Umpqua Investments to find the best solutions to help clients reach those growth, income, liquidity and estate goals.

Shawn enjoys spending time with his wife of over 34 years and his family. He served on the Oregon Make-A-Wish Board of Directors from 10-01-2008 to 09-30-2011.