

Jeffrey D. Kantor Vice President-Investments



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Jeff takes a holistic and proactive approach to providing financial services. He treats each client as a unique individual with a unique set of needs and goals. To serve his clients, he draws upon many years of experience as a successful financial advisor and on the great strengths and outstanding track record of Umpqua Investments.

Jeff has been a financial advisor since 1998. Prior to joining Umpqua Investments in 2009, Jeff was a second vice president of Wealth Management with Smith Barney in Portland, Oregon, where he held the designation of Financial Planning Specialist (FPS) and Senior Investment Management Specialist (SIMS). Jeff currently holds the designation of Private Wealth Advisor with Umpqua Investments, as well as the title of Vice President-Investments.

Jeff graduated from the University of Oregon in 1989 with a degree in finance and international business. He maintains his FINRA Series 7, 63, and 65 licenses as well as his life and health insurance license. Jeff is securities licensed in OR, CA, WA, ID, HI, KS, KY, NY, UT, NM and WI.

Jeff resides in Lake Oswego with his wife Joanne and two daughters. He is active in the community, serving as a board member of the Lake Oswego Rotary Club and as a board member of the Lakewood Center for the Arts.

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