



## Vincent J. Crivello

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### *Regional Director, Loring Ward*

Vincent Crivello is a Regional Director with Loring Ward. With over a decade of experience in the financial sector, he provides Investment Management, Business Management and Practice Development Services to independent advisors throughout California.

Prior to joining the Loring Ward, Vince was an independent advisor and partner with Tributary Advisors, a \$600MM advisory firm with offices throughout the US. Vince also helped design and launch asset and wealth management businesses in San Francisco. In addition to his six years with Charles Schwab, Vince consulted with a number of national and global wealth management firms including US Trust, Northern Trust, Bank of America Private Wealth Management, and Wachovia. Vince also continues to manage a small family office which includes family limited partnerships, trusts, real estate, and investment portfolios.

Vince received his Bachelors Degree in Political Science & Business Management from San Diego State University. A Certified Retirement Planning Counselor (CRPC) holder, Vince is also pursuing the Certified Financial Planner (CFP) designation. He holds Securities Series 7 and 66 licenses as well as an insurance license. He is member of the San Francisco Financial Planning Association (FPA) and a board member of the Marin County Estate Planning Council.

Born in Monterey, California, Vince now resides in Novato with his wife Linda and three sons Tyler, Ryan, and Vincent. An avid outdoorsman, Vince enjoys snow skiing, mountain biking, tennis, and coaching his children's sports teams.

