

# Jeffrey Trudeau

Vice President, Senior Portfolio Manager

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## CREDENTIALS

Chartered Financial Analyst®  
(CFA®)

B.A., Eastern Washington  
University, Cheney,  
Washington

As a Senior Portfolio Manager, Jeff delivers investment services to help clients work toward their goals. Jeff uses his experience to establish an integrated investment approach, offering asset allocation strategies and recommendations based on short- and long-term financial objectives, financial status and risk profiles.

Jeff has been in the financial services industry for over thirty years. His professional background includes extensive experience in portfolio management and investment analysis for retired executives, business owners and foundations.

Jeff is an active member of his community and enjoys supporting Inland Northwest Honor Flight.

Jeff resides in Spokane. When he is not at work, he enjoys craft beer analysis, the culinary arts and studying baseball and its history.



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