

## Jon Roth, RICP<sup>®</sup>

Development Director  
Principal Securities Registered Representative  
Financial Advisor



*Seeking ways to help achieve financial success?*

*I can assist with personal and business strategies targeted to help achieve your goals.*

**Let's connect to get started:**

916-773-3343, ext. 350

1478 Stone Point Drive, Suite. 390 | Roseville, CA 95661

CA Insurance License #0H17871

[roth.jon@principal.com](mailto:roth.jon@principal.com)

Visit my LinkedIn Page! [Jon Roth, RICP](#)

### EXPERIENCE:

Jon joined Principal<sup>®</sup> in 2013 and accepted a position as Development Director for the Northern California Business Center in 2015. With nearly 10 years of experience in the industry, Jon works with families and businesses alike focusing on their personal needs and adding value where he finds opportunity. As Development Director, Jon trains and coaches financial professionals in his region to follow his format for success.

Originally from Lexington, MA, Jon moved to California in 2005. He and his wife, Katie, were married in 2008 and together they have four children.

### EDUCATION & CREDENTIALS

- BS Marketing from Fairfield University
- Retirement Income Certified Professional, RICP<sup>®</sup> from the American College, 2016
- FINRA series 7, 63 and 65 securities registrations
- CA Life and Health Insurance, License # 0H17871
- Premier Club, 2014