

Michael K McDonough

Financial Services Representative
Principal Securities Registered Representative
Investment Adviser Representative



Michael McDonough brings a depth of experience helping business owners and executives develop financial solutions designed to address their investment, insurance and retirement objectives. Services include:

- Business Owner and Executive Solutions
- Comprehensive Employee Group Benefits
- Qualified and Non-Qualified Plans
- Estate Planning and Wealth Transfer Strategies
- Individual Financial Security and Retirement Reviews

Let's connect to get started:

(510) 995-8850
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Alameda, CA 94501

EXPERIENCE:

- 30 years of financial industry experience; 8 years with Principal[®]
- Held Branch Manager positions for several Investment Banking/Brokerage firms
- Was Chief Operating Officer of the Shemano Group, a San Francisco based Investment Banking firm

EDUCATION & CREDENTIALS

- Bachelor of Business Administration from Belmont University
- Series 7 & 63 General Securities registrations
- Series 65 Investment Advisor registration
- Series 4, 24 and 53 Principal/Supervisory registrations
- California Life Insurance, Accident and Health Insurance and Variable Contracts Licenses

INTERESTS:

- Alameda Chamber of Commerce President
- Alameda Boys & Girls Club Board of Directors
- Artist, Musician, Author and Public Speaker