



June 1, 2021

We're excited to introduce you to four great people who recently joined our Pacific Capital team!



Blake Wilkinson, CFF, Director of Investment Strategy.

- Joins us from Goldman Sachs, where he worked in the Investment Management division
- Earned an Economics degree from Brown University
- Played basketball in the Pac-12 at the University of Utah and then Brown University
- Previously was an Investment Analyst for the State of Rhode Island, where their Treasury's Office managed \$7.5 billion of investments
- Is Bloomberg certified and also a Certified Financial Fiduciary®
- He and his wife were married in Newport Beach, CA
- Fun facts: He found a bullet from the civil war when visiting Gettysburg. He also was slam dunked on in a college basketball game by current Portland Trailblazer Damian Lillard!



Jake Castillo, CFP, Financial Paraplanner

- Been working as a Financial Planning Intern for Pacific Capital for the previous 9 months
- Graduated Cum Laude from Cal State San Marcos
- Will complete the Financial Paraplanner Qualified Professional program this month
- Is enrolled in the CFP program at the College for Financial Planning
- Fun Fact: He earned a Black Belt in military style Tae Kwon Do!

The other two new members of our Pacific Capital team are Tyler Cole, a student at Texas Christian University (home for the summer in SoCal) and Alex Waddell, a student-athlete who attends Chapman University in Orange County, CA. Both Tyler and Alex are Financial Planning/Investment Research interns who support our team!

They've all already done a great job in their first few months with our team. I made a personnel change and let Darin go and replaced him with Blake. We appreciate the work Darin did for our company, and we wish him the best in his future endeavors. Jake did not replace anyone; he filled a brand new position based on the continued growth of Pacific Capital.

If you'd like to schedule a time to discuss your personal goals and financial life, click on the blue button below!

P.S. Click [HERE](#) to listen to a recent podcast episode where I was interviewed. The podcast name is "Living Intentionally."

Sincerely,



Chad W. Jiffardson
WEALTH ADVISOR FOR ENTREPRENEURS

Certified Financial Fiduciary®

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Schedule a Call

