

H. Ruben Weisson, CFP® CRPC®

First Vice President - Investments
Senior Financial Advisor, PIM Portfolio Manager



*“Wealth is not about money –
it is about being in a position
to do the things that matter
most to you.”*

Background and experience

For more than 24 years, I have had the privilege to serve as a financial advisor to families, individuals, and institutions. My true passion is engaging with clients who have worked hard their entire lives to create wealth and helping them preserve it for today and for future generations.

I take a comprehensive approach to investment planning and examine every element of a client’s financial life, including liability management, cash reserves, insurance, estate investment planning and tax implications.

I started my career with Merrill Lynch and Morgan Stanley before moving my practice to Wells Fargo Advisors in 2018. In 2007 I earned the CERTIFIED FINANCIAL PLANNER™ designation (CFP®). The CFP® certification identifies those individuals who have met the rigorous experience and ethical requirements of the CFP Board and have successfully completed coursework on financial topics in the following areas: general principles of financial strategies, insurance planning and risk management, employee benefits planning, and retirement and estate planning strategies. CFP® certificants also agree to meet ongoing continuing education requirements. In 2008, I became Chartered Retirement Planning CounselorSM and in 2018 I became a Private Investment Management (PIM) Portfolio Manager. As a PIM portfolio manager, I am a member of a select group of advisors who are qualified to manage client portfolios on a discretionary basis. Prior to joining the financial services industry, I earned a Bachelor of Science in Finance from The American University in Washington, D.C.

Away from the office

I enjoy community work through my involvement with the Rotary Club of Key Biscayne where I chair their Annual Wine & Food fund raiser. When I am not busy at the office, I enjoy spending time outdoors kayak fishing offshore.

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