



# CONFERENCE

APRIL  
25-27

20 X 18

SAN DIEGO  
CALIFORNIA

HILTON SAN DIEGO BAYFRONT

## **Tolen Teigen**

Principle and Co-owner  
Financial Decisions, Inc.



Tolen is a Principle and co-owner of Financial Decisions, Inc. and services as the Chief Investment Offices and Chief Compliance Office. In his current role, Tolen is responsible for overseeing the investment portfolios for individual and institutional clients and specializes in retirement planning, estate planning, and tax minimization strategies. In addition to these areas of expertise, he also oversees the firm's compliance mandates.

Prior to Financial Decisions, Inc., Tolen maintained a private financial planning practice and subsequently worked in the financial planning department at large, nation independent and broker/dealer with the primary focus of supporting its advisors with complex case design involving retirement and estate planning strategies.

During his 6.5-year tenure with the broker/dealer, Tolen was the lead speaker for the financial planning department and presented at all sessions of their conferences and advisors training sessions across the country totaling more than 60 sessions.

Tolen holds the following designations: Certified Financial Planner, Chartered Financial Analyst, Accredited Estate Planner, Accredited Investment Fiduciary, Chartered Advisor for Senior Living, Chartered Financial Consultant, and Certified 401(K) Professional.