Black Diamond Financial, LLC Announces Expansion with Oregon Office Opening

Adds Senior Wealth Manager with 30 years of experience as investors increasingly turn to advisors who specialize in low cost, index-based investments

BALTIMORE, November 14, 2016 -- Black Diamond Financial, LLC, a private wealth management firm focused on preserving and enhancing wealth primarily through index investing strategies, announced today it has hired Paul Svendsen, CPA/PFS, ABV, CVA as a Senior Wealth Manager to head its new office in Bend, Oregon. In his role, as Senior Wealth Manager, Mr. Svendsen will engage firm resources to deliver comprehensive wealth management solutions to individuals, families, trusts, businesses and foundations.

Mr. Svendsen brings 30 years of financial experience to head our new Oregon office including work as a Certified Public Accountant, Personal Financial Specialist and Certified Valuation Analyst. Mr. Svendsen specializes in business succession planning, wealth management and estate planning for high net worth individuals. Since 1999, Mr. Svendsen has been advising business owners and wealthy individuals throughout the west coast as an independent financial advisor and business valuation specialist. Previously, he worked at Grant Thornton, an international accounting firm, and as the CFO of Central Electric Cooperative. Mr. Svendsen received a B.S. in accounting and an M.B.A. from Portland State University and also holds the Series 65 securities license.

“We are excited to welcome Paul to the team. He has significant financial service experience, tremendous investment acumen and impeccable ethical standards. This new office expands our reach in an area where we have existing client relationships at a time when investors are increasingly seeking advisors who specialize in low cost, index investments,” said Matt Goette, President, Black Diamond Financial, LLC.

About Black Diamond Financial, LLC

Black Diamond Financial, LLC is a private wealth management firm focused on preserving and enhancing wealth primarily through index investing strategies. The firm’s mission is to create an individualized index-based investment portfolio for each client that is risk-appropriate, returns-optimized and tax-efficient. At Black Diamond Financial, the firm’s index investing strategy employs a disciplined, low cost, quantitative approach, emphasizing broad diversification and consistent exposure to publicly traded markets globally.

Contacts:

Laura McMillen
Black Diamond Financial, LLC
(443) 841-7772 or laura@blackdf.com