Bio | COLLEEN JORDAN HALLINAN

"I work with clients who appreciate the disciplined process of wealth management, and what they really want to establish is a partnership with their advisor. I help connect the dots of their life with their financial goals."

If you were to watch Colleen Jordan Hallinan interact with her clients, it might be difficult to tell whether it was a business meeting or two friends catching up. Colleen's clients form a personal bond with her — and that's how she prefers it.

In addition to comprehensive financial planning and portfolio management, Hewins Financial Advisors Senior Vice President and Principal Colleen makes herself available to discuss any major life or financial decisions with clients, who frequently rely on her knowledge and experience for a variety of needs: refinancing a mortgage, recommending a 529 provider or short-term cash management.

"Clients won't do that unless you've set the expectation. To me, it's rewarding."

Having worked as a broker in the late 80s, Colleen realizes now that she was implementing modern portfolio theory and asset allocation at a time when it was standard mainly for institutions. She was then recruited to train experienced brokers and planners on this process and the benefits of taking a broader view of their clients' financial needs. Her early adoption of this approach has solidified her leadership in the industry over the past 20 years.

Many of Colleen's clients are using their portfolios to supplement their lifestyles, so Colleen stays in close contact with them and will coordinate services with their CPA, attorney and other advisors to properly manage distributions and tax consequences. Her connections to local professionals result in objective referrals that build even more trust.

Colleen is a member of the Investment Management Consultants Association and the California Women's Leadership Association. Colleen's interest in serving her community led her to win election twice to the City Council of Redwood City, California. She currently serves as a commissioner on the San Francisco Bay Conservation and Development Commission as one of five gubernatorial appointments to the 27-member board. The BCDC oversees prudent development on the shoreline of San Francisco Bay, while protecting its environment and the public's access to the Bay.

A Career in Personal Investing and Financial Planning

Vice President at PR Taylor Associates, managing retirement plan consulting to venture capitalists and fast-growing Bay Area companies; District Manager for ADP, rolling out the firm's 401(k) plan to payroll clients; Associate Regional Coordinator, Retirement and Trust Services for Prudential Securities, training and supporting more than 600 financial advisors, branch managers and staff; Financial advisor at Prudential-Bache Securities

Education

B.A. from the University of Southern California
Holds NASD Series 65 Licensure as a Registered Investment Advisor Representative
Has held NASD Series 7 & 63 Licensure for security sales
Center for Investment Training, Callan College
Former political consultant and congressional aide

Contact Colleen

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