

Bio | PATRICE CRESCI

Patrice has served as a vital member of Hewins Financial Advisors since 2006. She spent her first two years on the Client Service Team supporting the firm's largest clients, as well as supervising the Client Service Staff. In 2008, Patrice was promoted to Associate Consultant and has since earned her Certified Financial Planner™ certification. Patrice effectively employs her hard-earned knowledge and skills in helping clients shape their ideal financial future. She is firmly dedicated to providing quality service for all clients and enjoys exceeding client expectations.

Having spent more than ten years studying the piano, Patrice has cultivated a strong sense of discipline and a high regard for structure. She understands firsthand the benefits of instituting discipline and structure when pursuing a goal, as well as the fulfillment associated with achieving it. Patrice helps clients attain financial harmony by understanding their goals, developing a plan to reach them, monitoring the plan's progress and fine-tuning it as necessary along the way.

A pathfinder is defined by Webster as “a person who helps themselves or others to find or make a pathway or route, especially through a previously unexplored or untraveled wilderness.” Patrice is a committed guide, helping clients plot their own financial paths and advising them in making both financial and life decisions that align with their goals and ultimately, leading them to their appointed financial destination.

“Every day, my number one focus is to ensure that clients receive a superior level of service and support. Developing achievable, navigable paths that allow clients to see beyond today’s horizon and guiding them toward their financial goals is my primary objective.”



A Career in Client Service, Personal Investing and Financial Planning

Consultant Associate, Hewins Financial Advisors, LLC; Client Service Manager, Hewins Financial Advisors, LLC; Customer Service Representative, Firestone Vineyards

Education

B.S. with a concentration in Finance and Appraisal, California Polytechnic State University, San Luis Obispo

CFP® Certificant, Certified Financial Planner Board of Standards, Inc.

Contact Patrice

Senior Associate Consultant
650-620-3040
pcresci@hewinsfinancial.com

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