



# William Patrick Brennan

PPC™ Senior Vice President



Pat has been a professional financial advisor with Capital Growth, Inc., an independent financial planning and investment management firm, since 1998. Pat's client base consists primarily of families and small business owners. His primary focus is on each client's personal investment strategy and long-term retirement planning. In addition, Pat's personal goal is to help his clients plan effectively for their retirement in advance to maintain their quality of life throughout their retirement lives.

Pat graduated from Pepperdine University with an MBA in 1998 and a BA from San Diego in 1989. He began his business career when he secured his real estate license at 18 to help finance his college education. After earning his MBA, he started in the financial services industry with Capital Growth, Inc. Pat holds four securities licenses, including Series 7, 6, 63 and 65. He also has a California Life and Disability Insurance License (0C14069) and a California Real Estate License. Before joining Capital Growth, Inc., Pat was a Regional Manager for Transtel Communications in Los Angeles.

A native of Southern California, Pat enjoys camping, golfing, and traveling with his family and friends. He resides in Carlsbad with Erin, his wife of 30 years, and takes pride in their two adult children, who have graduated from college and are now pursuing successful careers. His role model is his father, who taught him the values of perseverance, integrity and planning for the future.

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## Professional Licenses and Certifications:

FINRA series, 6, 7, 63 and 65  
Life, Health & Disability Insurance Licensed  
Professional Plan Consultant (PPC™)  
California Real Estate License (CA License #00919270)

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