SELECT PORTFOLIO MANAGEMENT, INC.
Integrated Wealth Management
A Registered Investment Advisor

Darren G. Whissen, MBA

Wealth Advisor

As a Wealth Advisor, Darren's role is to help clients transition from uncertainty and indecision regarding their financial circumstances to confidence that their goals and objectives are being met.

Darren's first priority is to listen closely to each member of the family in order to understand their unique needs and values. Utilizing industry-leading planning tools, Darren builds a customized and comprehensive Family Wealth Charter®, incorporating the core tenants of an integrated wealth management plan: growth, protection, utilization, and transfer.

Darren understands that the effective implementation of a wealth management plan requires strong collaboration among a client's team of advisors. Should the need to assemble or modify the team arise, Darren is happy to introduce his network of professionals who all share the same client-centered commitment to providing objective advice and solutions.

Darren takes a proactive role in managing client's investments. He schedules periodic calls to discuss recent performance and requires face-to-face client meetings at least annually in order to revisit client's goals and maintain their Family Wealth Charter®.

Darren also helps clients improve their financial acumen by hosting regular educational events.

Professional Experience

Darren G. Whissen, MBA, is an Investment Advisor Representative with Select Portfolio Management, Inc. (SPM). He is also a Registered Representative of Securities Equity Group, member FINRA, SIPC, MSRB.

Darren began his career at Accenture, Inc. (formerly Andersen Consulting) as a Consultant in its Business Solutions Group. Later, he joined Proxicom, Inc., an e-commerce consulting firm, which he helped grow into a publicly-traded firm.

After earning his MBA from the University of California at Irvine, Darren co-founded and served as interim CEO of Intelligent Horizon, Inc., a management services provider focused on maintaining enterprise-level business reporting databases.

Darren was later recruited as Director of Due Diligence at Waveland Capital Group, Inc., a boutique private equity investment bank. He then decided to follow his passion for personal financial planning and joined Edward Jones as a Financial Advisor. After a chance meeting with SPM's principals, Darren immediately joined the SPM team due to their unique capabilities and comprehensive approach towards wealth management.

Darren is active in the local business community. He currently serves as President of the Lake Forest Chamber of Commerce and is a Corporate Director for the South County Regional Chambers of Commerce. He is a Charter member of the UC Irvine, Merage School of Business, Center for Investment and Wealth Management as well as a member of the UC Irvine, Merage School of Business, Dean's Leadership Circle. Darren also serves on the boards of several local non-profit organizations.

Education

- MBA – University of California, Irvine
- BA – Government, Philosophy, St. Mary's College

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