



Jeffrey M. Viveros

Financial Educator and Award-Winning Advisor

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Over the course of his career, financial planner Jeffrey M. Viveros has helped clients and members of the public pursue secure retirement years. He has lead as CEO of Strategic Financial Services in Corpus Christi, Texas, for more than 33 years, and in that time he has secured certification as an Ed Slott Master Individual Retirement Account (IRA) Advisor. Jeffrey M. Viveros uses this expertise to provide personalized planning support as well as educational programs and courses.

As a member of the faculty at Del Mar College and the Alamo Colleges District, Jeffrey M. Viveros teaches retirement preparation and social security courses to students nearing or at retirement age. He also offers public workshops and community outreach events, through which he helps attendees to understand their social security benefits and any other options that they may have to help them meet their retirement goals. Focused particularly on the needs of educators and others who serve the community, he has spoken before school districts as well as union employees and federal government representatives.

In pursuit of his goal to serve teachers, Jeffrey M. Viveros has joined forces with his brother to establish Educators Financial Services and Safe Harbor Financial. He remains active as a financial advisor, and he has earned multiple recognitions for his work. Acknowledged as a top producer by a number of financial and benefits groups, Mr. Viveros most recently earned Advisor Elite wards from Face 2 Face, American Equity, and Life Insurance Company of the Southwest.

EXPERIENCE

Strategic Financial Services

May 1, 1984 to Present

CEO

EDUCATION

University of Texas at Austin

Jul 1, 1979 to May 1, 1984

BS