Loreen Gilbert
Owner
WealthWise Financial Services
Dallas, TX

Loreen Gilbert is an experienced wealth manager who has spent more than three decades creating comprehensive wealth strategies for her clients. Upon graduating from The University of Texas at Austin with a degree in Business Administration, she launched her career at Fidelity Investments where she assisted clients with investment management services. Gilbert then worked for a private company selling retirement plans to municipalities and their employees. She has been in private practice as a wealth manager since 1997, and is the founder and CEO of WealthWise Financial Services, which offers securities and investment advisory services to individuals, business owners and corporations through her affiliation as a registered principal with LPL Financial.

In 2022 and 2023, Loreen made the Forbes Top Women Wealth Advisors Best-In-State list. In 2021, she made the Forbes Top 1000 Female Advisor list and the Forbes Best-In-State Wealth Advisors. She was awarded the ThinkAdvisor Luminaries Class of 2021 in the Thought Leadership category. For ten years including 2022, Loreen received the Five Star Wealth Manager Award as published in Orange Coast Magazine and The Wall Street Journal. Loreen was also named winner of the 2020 Silver Stevie Award in the Female Entrepreneur of the Year category for Women in Business. Gilbert is the past Chair of the NAWBO Institute (National Association of Women Business Owners Institute), which provides resources and tools to women business owners around the globe. She spent seven years on the NAWBO - OC Board followed by a year on the NAWBO California Board and four years on the NAWBO National Board, representing more than 11 million women business owners in the US.

Gilbert has been covered by CNBC, Bloomberg, Fox, TD Ameritrade, BBC, Cheddar, US News & World Report, USA Today, Investor's Business Daily, Yahoo! Finance, Money Magazine, Reuters, Financial Advisor Magazine, Plan Sponsor Magazine and WealthManagement.com.

Loreen is committed to giving back through many charitable organizations. Loreen currently serves on The University of Texas at Austin McCombs Dean's Advisory Council. Loreen also sits on the Advisory Board for The University of Texas at Austin McCombs Wealth Management Center where she has served since 2021. She is on the Tocqueville Society Cabinet for Orange County United Way as well as is involved in the Women's Philanthropy Fund. She sits on the Business Leadership Committee for Segerstrom Center for the Arts. Gilbert is a member of the National Board of Governors for Opportunity International and the advisory board for Hope International, both micro-lending organizations helping families in developing countries to start/expand a business.

Gilbert's business licenses and credentials include registration as an Investment Advisor Representative with LPL Financial; FINRA Series 7, 63, 24, and 65, registrations held through LPL Financial; Certified Investment Management Analyst (CIMA) designation; Accredited Investment Fiduciary (AIF) designation; insurance licensed in Life, Disability, Variable Life, and Long-Term Care; and Bachelor of Business Administration.

*The Luminaries Program shines a spotlight on how industry participants are producing results in thought leadership & education. They were selected by a diverse panel of judges from across the industry and the editorial team at *ThinkAdvisor*** The Forbes ranking of America's Top Women Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors with a minimum of seven years of experience and weighing factors like revenue trends, assets under management, compliance records, industry experience and best practices learned through telephone and in-person interviews. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receives a fee in exchange for rankings.***Five Star Award is based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Wealth managers do not pay a fee to be considered or placed on the final list of 2012- 2022 Five Star Wealth Managers.