

PAMELA J. LORENZ, CFP®

CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL



Pamela J. Lorenz has always been able to balance her active lifestyle with her responsibility of providing a steady hand for her clients as their financial advisor. Taking a rather unique approach with her clients, she advises them “to plan as if they will live forever...but to live as if they may die tomorrow.” This fresh outlook has allowed Pamela to be successful in her career in the financial arena, a career spanning 35 years.



In 1975 Pamela decided to enter the financial services industry after earning her degree from the State University of New York at Buffalo. With the goal of wanting to make tax and financial services available to all people and not just the wealthy, she obtained her tax license that same year and began serving clients. After obtaining the necessary insurance and securities licenses, Pamela founded Advanced Tax & Insurance Services in 1988, a tax preparation and financial services company based in Anaheim Hills, CA.

To better service her clients, Pamela continued her professional education through the College for Financial Planning in Denver, CO and in 1991 earned her Certified Financial Planner (CFP®) designation. Today, her numerous licenses and designations include:

- Series 6 (Mutual Funds)
- Series 7 (General Securities)
- Series 22 (Limited Partnerships)
- Series 63 (Uniform Securities Agent)
- Variable Life & Annuities License, CA Insurance License #0705639
- Life & Disability License through the State of CA
- Registered Tax Preparer through California’s Tax Education Council (CTEC)

Today Pamela is currently a Registered Representative with First Allied Securities, Inc. After meeting Anthony Reguero, Pamela decided that it was time to join a winning team. The pooled talents, experience, and resources available at WIN-TEAM could offer her clients the complete full-service financial planning and retirement solutions they require.

In her free time, Pamela enjoys traveling, deep-sea fishing, and science fiction. An avid Star Trek fan, Pamela’s favorite motto for friends and clients is, “Live long and prosper.”