

David Jorgensen
First Vice President
Portfolio Manager
Alternative Investments Director
Financial Advisor

Dave is the Portfolio Manager, Alternative Investments Director and a Managing Partner of a wealth management team at a major wirehouse in Hartford. He is responsible for investment strategy, trading and risk management, holding FINRA Series 6, 7, 31, 63, and 65 securities licenses as well as life, accident and health insurance licenses in several states. Dave has a broad array of business and individual clients, whom he advises in the areas of investment, asset management, risk management, financial planning and benefits. His primary clientele are business owners, executives and professional athletes.

Dave's career began with The Hartford Financial Services Group in New York City as an institutional wholesaler to major bank and wirehouse clients. He moved on to become Vice President of the Sports & Entertainment Group at Lenox Advisors, a wealth management firm in midtown Manhattan. In 2012, he moved his practice home to Connecticut and joined his mother Linda to form the Jorgensen Group at Morgan Stanley.

Dave is dedicated to his community, serving on the Investment Committee of the United Way of Northern CT and as Chairman of the Hartford Police Athletic League. He has served on the City of Hartford Police Review Board, Planning and Zoning Commission, and as Vice Chairman of the Hartford Redevelopment Agency. In 2012, he was appointed by Gov. Dan Malloy to the board of the Capital Region Development Authority, a State of Connecticut quasi-public agency charged with economic and housing development in the metro Hartford area.

Dave grew up in Hartford, CT, and graduated from the Avon Old Farms School, in Avon, CT. He earned an athletic scholarship to the University of Florida, where he was a 3-year starter for the Gator football team and won an SEC Championship in 2000. He lives in Hartford, CT with his wife and 3 children and enjoys boxing, golf, hiking and coaching youth sports outside of work.