



Eugene Choi, CFP® Southeast Regional Director

Eugene Choi is the Southeast Regional Director for Dunham & Associates Investment Counsel, Inc., responsible for working with financial advisors to raise assets using Dunham's institutionally-managed mutual funds, Asset Allocation Program, and Dunham Trust Company's Nevada-based trust services.

Eugene brings a unique blend of sales and analytic skills to the financial advisors in his region. Prior to joining Dunham in 2014, Eugene worked at Commonwealth Financial Network, where he was responsible for providing Commonwealth sales and practice management solutions to over 1,500 independent investment advisors. Before that, he was a Financial Representative with Fidelity Investments, where he provided lifecycle investment guidance. He was also a Wealth Management Assistant for UBS Financial Services, where he performed discounted cash flow analysis and client service support for three financial advisors with \$750 million of assets under management. While obtaining his undergraduate degree in San Diego, he worked as an Apple sales and marketing representative.

Eugene prides himself as a successful amateur gameshow contestant and has appeared on Let's Make a Deal, Hollywood Game Night and Food Fighters.

Eugene carries a B.A. in Economics from the University of California, San Diego, is a Certified Financial Planner (CFP®) and is currently studying for his Accredited Estate Planner (AEP®) designation. He holds FINRA Series 7, 63 and 66 registrations.

At a Glance

- ✓ Regional Director for the Southeast Region
- ✓ Brings a unique blend of sales and analytic skills to the financial advisors in his region
- ✓ Bachelor's degree in Economics from the University of California, San Diego
- ✓ Holds FINRA Series 7, 63 and 66 registrations

About Dunham & Associates

In 1985, Jeffrey Dunham founded Dunham with the uncommon idea that fees paid by clients should be tied, in some way, to the performance of the investments they own. Today, Dunham and Dunham Trust have grown to become a multi-billion dollar firm, but we are still driven by the values of fairness and accountability that Jeffrey envisioned more than three decades ago.