



DJ LEE, CFA® CFP®

DIRECTOR OF FINANCIAL PLANNING

DJ is an expert in global macro-economy research, investment analysis, portfolio optimization, and risk management.

Born and raised in South Korea, DJ moved to Reno, Nev. in 2001 to pursue a college education. He received a B.S. in information systems and an M.S. in finance, both from the University of Nevada, Reno. His finance degree led to a career in the investment world.

DJ began his career as an investment analyst in late 2007, just before the 2008 financial crisis was making headlines. Starting his professional career during one of the worst periods in financial market history led him to focus more on risk management and alternative investments. While gaining experience in managing high-net-worth client portfolios, he continued to deepen his knowledge on investments. In 2016, he became a Chartered Financial Analyst and a Certified Financial Planner in 2025.

In addition to a full-time career as a financial advisor, DJ teaches introductory finance and investment courses to undergraduate students at UNR. DJ makes a point to help his students understand investments on both academic and practical levels. He also advises the UNR Investment Club and is involved in their investment competitions.

DJ's wealth management philosophy is total transparency, believing clients are better equipped to reach their financial goals when they understand the entire financial picture. His detailed understanding of macroeconomic conditions, alternative investments, and global monetary policies helps him build thoughtful, tailored portfolios for his clients.

A clear channel of communication is always open between DJ and his clients. He is diligent about following up, answering questions, and offering ongoing advice to his clients so they are informed, engaged, and prepared for the future.



DESIGNATIONS

Chartered Financial Analyst, CFA®
Certified Financial Planner, CFP®

EDUCATION

University of Nevada, Reno

M.S. in finance

B.S. in information systems

COMMUNITY INVOLVEMENT

University of Nevada, Reno,

Adjunct Professor

Community Foundation of Northern Nevada, Investment

Committee Chair

Scouting America, Nevada Area Council, Investment Committee Chair

American Wealth
Management 570 Hammill
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