

ROCKBRIDGE

group

Preston Sartelle, CFA, Founding Principal



Professional History & Education

Preston Sartelle is a founding principal of RockBridge Group.

Preston is the architect and chief strategist of the RockBridge Texas and Oklahoma business plan. He launched and developed a successful estate planning and wealth transfer practice in Texas in 2008 on behalf of a leading M Financial Member Firm, where he served as Director of Business Development. Preston established critical relationships with centers of influence, such as leading planning attorneys, tax accountants, private banks and wealth advisors. Joined by Edmund Perry in 2013, Preston has continued to grow those relationships for RockBridge through superior advice and customer care.

Before entering the life insurance industry, Preston served as an executive recruiter with a management consulting and executive search firm specializing in Texas financial services firms. He worked in Madrid, Spain for the accounting and project administration groups for Asea, Brown, Boveri (ABB), a major international power systems firm.

A graduate of Washington & Lee University, Preston obtained a B.S. in Accounting. He currently holds his life insurance, Series 7, and Series 66 licenses and is a C.F.A. Charterholder.

Personal/ Interests

Preston resides in Houston, Texas with his wife, Kristin. They have three delightful children: Nate, Ella Rose and John Preston – better known to friends and family as “Dash”. Tennis, golf, and travel are a few of Preston’s passions.

Securities offered through M Holdings Securities, Inc., a registered Broker/Dealer, Member FINRA/SIPC. RockBridge Group, LLC is independently owned & operated.