

Geoff Zimmerman, CFP®



Geoffrey M. Zimmerman (“Geoff”) specializes in assisting with complex issues and decisions faced by corporate executives and other professionals. Geoff is particularly deft at assisting those preparing for or currently weathering a major life transition, such as retirement. Gap analysis and interacting with clients keep him energized. He excels at asking the right questions, leading clients to think about the right issues.

Geoff sees a parallel between financial planning and practicing medicine: Financial planning is our due diligence; in medical terms it is the diagnosis before writing a prescription. Furthermore, he says, “If you are a medical practitioner, it is important to know your patient’s current health, medical history, allergies, and awareness of what medications they are currently taking in order to recommend appropriate treatment and avoid adverse drug interactions. Similarly, with financial planning, you need to be aware of the intersection and interaction between the host of areas in a person’s financial life – saving, spending, investing, insurance, taxes, legal documents, etc. to help make sure they are also well coordinated. A skilled financial planner can help coordinate these elements to work well together and avoid adverse interactions.”

At the University of California Santa Barbara, Geoff double-majored in economics and mathematics, receiving his BA in 1989. In 1999, while working as an investment consultant for Charles Schwab and Co, Geoff completed UC Berkeley Extension’s Certificate in Financial Planning program with academic distinction, and earned the CFP designation the following year. Shortly thereafter, he was named Schwab’s Regional Financial Planner for the Bay Area, and was highly regarded for his planning knowledge and his work in corporate equity compensation.

In his off hours, Geoff serves as President of the Estate Planning Council of Diablo Valley and sits on the Planned Giving board of the East Bay Regional Parks Foundation. In the past, Geoff and his wife Lynn have volunteered at the Lafayette Town Hall Theater; their dog Molly was adopted while Geoff served as an adoption counselor for the German Shepherd Rescue of Northern California. Geoff is also an avid hiker and amateur photographer.



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