

JON-ERIC KRONVALL

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With over 37 years of experience in the financial services industry, my background includes various positions in regional bank management, wealth management, audit and risk management, business consultancy, and entrepreneurialism. As a region manager my scope included risk management, human resources, public relations, leadership, and management; functional areas of oversight including consumer and business loan portfolios, insurance and investment partners, and various other business lines of production. As a wealth advisor I managed a credit and investment portfolio of over 2 billion in assets; revenues generated by these relationships was over 1 million dollars of annual revenue. I have worked with regulatory agencies, law enforcement, and international cross border issues. As an entrepreneur I have created several consulting companies which serve both consumers and businesses. My personal compliance, legal, and credit worthiness are impeccable. I am an accomplished public speaker which includes eight years of competitive speech and debate. Experienced expert and material witness in both civil and criminal cases.

EXPERIENCE

2022-Present

Esoteric Advisors

Consultant, Advisor, and Principal

- Review various aspects of investments, real estate, closely held assets and risk management.
- Expert advisors that specialize in unique areas of knowledge within a wide scope of financial services.
- Serve as an expert advisor or witness on various topics, including consulting for other professionals and interpreting specific facts for material case work.
- Adept at virtual and in-person consultations and presentations.
- Our mission is to make specialized areas of financial services understandable to everyone in plain simple terms.

2017-Present

Advisor and Principal

Wealth Innovation

- August 2022 formed a California Registered Investment Advisory Firm.
- June 2017, Independent Investment Advisor Representative.
- Create, Monitor, and Manage Investment Portfolios.
- CEO and Chief Compliance Officer.

2017-Present

Consultant, Advisor, and Principal
Wealth Advocacy

- Provide comprehensive financial advice and governance to businesses and individuals.
- Collaborate and coordinate the expertise of other experts to achieve the best client results.
- Foster and evolve the vision and values of both individuals and organizations.
- Advise and develop programs for work force engagement for both organizations and individuals.

1991 – 2017

Wealth Advisor and Regional Manager
Wells Fargo Bank

- Managed over two billion in assets, generating 1 million in revenue, and delivered wealth solutions to families and businesses.
- Wealth team included a portfolio manager, trust officer, banker, financial advisors, insurance risk managers, and support team.
- As a regional manager oversaw 56 offices with over 600 employees.
- Responsible for sales, compliance, operations, loan oversight and the human resource function.

1985 – 1991

Regional Audit Manager
Santa Barbara Federal Bank

- Managed the compliance of 22 retail offices and loan functions.
- Conducted branch audits and training sessions with staff.
- Hired, trained, and managed operational staff.
- Ensured maintenance of cash controls, budget, and operational function.

EDUCATION | CERTIFICATIONS | LICENSES

Certified Trust and Financial Advisor, American Bankers Association.

Finance and Banking Graduate, Pacific Coast Banking School, University of Seattle.

Bachelor of Arts, Political Science, Humboldt State University

Series 7 and 66. Investment Advisor Representative. Various State Registrations.

California Real Estate, Health, Life, and Disability Insurance Licenses.

Voting Member of the Securities Experts Roundtable.

Treasurer of Kauai Planning and Action Alliance.