

business sponsor
of the month

Writer Jessica Green



Victory Independent Planning

By writer
Jessica Green



Victory Independent Planning offers investment advisory services and financial planning to families and charitable causes. After over a decade in the financial services industry, Patrick Huey, CERTIFIED FINANCIAL PLANNER™ and Chartered Advisor in Philanthropy® founded Victory Independent Planning to help private clients and charitable organizations optimize their financial strategies. Huey identified seven areas where he thought traditional advisors failed to deliver for clients and made them a core strength of his business, called the VIP Experience.

"I focus on helping investors, retirees and the causes they care about dream and design their financial strategies. Whether it's planning for individual retirement, business succession or helping an organization meet their mission goals, my specialty is charting a course so clients can have maximum impact during their lives and beyond. My goal is to be a difference maker for the people with whom I work," says Huey.

Huey holds a Master of Business Administration degree from Arizona State University. Originally from Pennsylvania, Huey migrated west after graduating from the University of Pittsburgh and receiving his officer's commission in the United States Navy. During two overseas deployments, he flew the F-14B Tomcat with the Jolly Rogers Fighter Squadron 103, which uses the radio call sign "Victory." The name Victory Independent Planning, is a nod to Huey's service as a Naval Flight Officer.

"Flying taught me that being prepared and methodical can literally be the difference between success and disastrous failure," says Huey. "Checklists were mandatory, and they still are in my practice to get clients organized and ready for the challenges they face."

Huey is the volunteer Treasurer for Portland's Sunshine Division, a food and clothing relief organization, and authors History Lessons, a blog drawing on historical anecdotes to teach investment lessons. He lives and works in Camas with his wife and business partner, their young son, and a Newfoundland dog.

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