



OAK HARVEST
FINANCIAL GROUP



Advisor Team

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We are an independent financial services firm helping individuals create retirement strategies using a variety of investment and insurance products to custom suit their needs and objectives. Advisory services are provided through Oak Harvest Investment services, LLC a registered investment adviser. Insurance services are provided through Oak Harvest Insurance services, LLC an insurance agency.

The financial professionals at Oak Harvest Financial Group stand ready to help you defend your retirement dreams.

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CHRIS PERRAS

Chief Investment Officer | CFA®, CLU®, ChFC®

The myth. The man. The Harvard business school graduate. Meet Chris Perras, the superhero of portfolio management and the fearless leader of our investments division. Renowned in the institutional investments world for having managed top mutual funds nationally, Chris sports an impressive résumé and a long list of accomplishments.

But despite all his success, Chris still felt something was missing.

Chris longed to see how his passion for all things money management impacted an actual family, a couple, a person. To our delight, the stars aligned, and Chris joined our retirement dream team, giving him the chance to look clients in the eye and shake their hands. Because he keeps on the cutting edge of market happenings, he's always armed with strategies for goals-oriented portfolio management.

SUPERPOWER

Investment prowess

SECRET WEAPON | That résumé. *See résumé

YEARS OF SERVICE | 30+

LUIS LEÓN

Financial Advisor

Luis León came to us from the "dark side," also known as the investment banking world, after almost three decades in corporate America. He knew he could capitalize on his unique strength — uncovering the goals and values of his clients — if he wasn't held captive by large corporations and limited to certain services and products. He couldn't wait to toss out those cookie-cutter retirement plans and begin implementing a financial strategy designed for each client!

Fate soon connected Luis to our firm when, out of the blue, he received a call from a recruiter, who said, "Luis, Oak Harvest is looking for YOU." We count our lucky stars that Luis brought his creativity and extensive experience to our retirement dream team. What's more, we don't mind that Luis now says he was the one looking for Oak Harvest.

SUPERPOWER

Vast knowledge of financial markets

SECRET WEAPON | Fluent in Spanish

YEARS OF SERVICE | 27

TROY SHARPE

Co-Founder and CEO | CFP®, RFC®

Even the most complex retirement planning concerns are no match for CERTIFIED FINANCIAL PLANNER™ professional Troy Sharpe. Known as "The Sharpshooter" for his problem-solving skills and vast knowledge of financial strategies, tax planning and income planning, Troy believes where there's a challenge, there's a solution. His rule of thumb: "Reliable income streams beget a reliable retirement."

When Troy's not out rescuing retirements from inflation, market risk, health care concerns and tax erosion, you can catch him sharing his mission on "The Retirement Income Show" at 6 p.m. every Saturday on KTRH 740AM.

SUPERPOWER

Financial planning

SECRET WEAPON | CFP® from Rice University (and his wife, Jessica)

YEARS OF SERVICE | 15+

JESSICA SHARPE

Co-Founder and President

She is woman; hear her roar.

Jessica Sharpe serves as a passionate advocate for women's financial empowerment — and is a force to be reckoned with. She believes, to her core, that baby boomer women are superheroes at heart. As caregivers for aging parents, supporters of adult children as well as career women and domestic goddesses, women do it all for their families and take little time for themselves.

A true champion for women, Jessica knows how to ask the questions that reconnect women to their money and boost their confidence in retirement.

Under Jessica's care, women get permission to put themselves first and let go of financial burdens. When Jessica is not empowering women financially, she's presenting informational workshops and hosting social events to unite boomer women.

SUPERPOWER

Understanding unique financial challenges of women

SECRET WEAPON | Translating financial-speak into plain English

YEARS OF SERVICE | 14

FRANK PIZZOFRERATO

Strategic Insurance Expert | CEP®

A 33-year veteran of the financial industry, Frank Pizzoferrato is an esteemed Certified Estate Planning professional of over 15 years. He stands ready to help guide you through legacy planning and wealth transfer planning, with expertise in life insurance, long-term care, annuities and Social Security.

If you're a firefighter, police officer or a teacher, Frank is on high alert to help you navigate your pension options. Have an existing insurance policy? Need a refresher? Frank is your insurance hero. He will quickly and efficiently explain the nuts and bolts of your policy.

SUPERPOWER

Estate planning and Insurance strategies

SECRET WEAPON | CEP® certification

YEARS OF SERVICE | 33+

JARED KENNEY

Financial Advisor | NSSA®

What's better than a visit to your local Social Security office? Well, a lot of things, actually. But if you have a burning Social Security question, Jared Kenney is your man ... or, better yet, superman.

Not all heroes wear capes. What Jared has done for our clients is rescue hundreds of thousands of Social Security dollars that were almost left on the table. As Jared likes to say, "Social Security as part of an overall plan can be an important income stream for retirees, so let's squeeze the most we can out of 'em!"

Social Security analysis is just one of Jared's superpowers. He's the ultimate team player and has worked exclusively with retirees for over a decade. In addition, he has the heart of a teacher, the mind of an engineer and the spirit of a coach.

SUPERPOWER

Maximizing Income streams in retirement

SECRET WEAPON | National Social Security Advisor® certificate

YEARS OF SERVICE | 12