

San Blas Securities Expands to Puerto Rico

*Industry Veteran Jeff Rodriguez Heads
New Puerto Rico Office*

CHICAGO, IL, UNITED STATES,
November 21, 2024 /

[EINPresswire.com/](https://www.einpresswire.com/) -- San Blas Securities, a leading full-service investment banking, securities and independent wealth management firm headquartered in Chicago and member of FINRA, SIPC and MSRB, today announces the opening of a new branch office in San Juan, Puerto Rico. The office will be led by Jeff Rodriguez, CFP, AIF, CIMA, an experienced financial professional with a proven track record in institutional sales and wealth management.

Rodriguez and his team currently manage over \$470 million in client assets. He brings over two decades of experience to San Blas, further strengthening the firm's commitment to growth and personalized client relationships. Rodriguez joins San Blas from B. Riley Wealth Management and previously held a position at UBS.

"We are delighted to welcome Jeff to the San Blas team," Executive Chairman Alex McKenzie says. "His extensive experience and deep understanding of the financial industry, particularly in Puerto Rico, will be invaluable as we expand our presence in the region. We are confident that Jeff's leadership will greatly benefit both our clients and the firm."

Rodriguez is a Certified Financial Planner (CFP), Accredited Investment Fiduciary (AIF) and



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Jeff Rodriguez, CFP, AIF, CIMA, Heads the Puerto Rico Office

Certified Investment Management Analyst (CIMA). He holds FINRA Series 7, 24, and 66 licenses. A respected thought leader in the industry, Rodriguez frequently speaks at industry events. Recent engagements include a presentation on the financial sustainability of health centers at the Asociación de Salud Primaria de Puerto Rico and a panel discussion on institutional investors at the Investments and Wealth Institute conference. He holds a B.A. in Public Accounting from Pontificia Universidad Catolica de Puerto Rico, an MBA from the University of Phoenix, and has completed executive education in investment management at the Yale School of Management.

About San Blas Securities

San Blas Securities is a leading investment banking, securities, and independent wealth management firm committed to providing comprehensive financial solutions to individuals and institutions. With a focus on building long-lasting relationships, San Blas Securities offers a wide range of services tailored to meet the unique needs of its clients. Headquartered in Chicago, the firm is a member of FINRA, SIPC, and MSRB. For more information about San Blas Securities, visit the website at sanblassecurities.com or call 773-661-4448.

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