

**Michael Yee**

**CFP®, CRPC™, CFS®, CLTC®**

Private Wealth Advisor

CERTIFIED FINANCIAL PLANNER™ practitioner

39 Years of Experience

This number may include years as a financial advisor, and/or experience as a registered representative.

[Na Ho'okele Financial Advisory Team](https://www.ameripriseadvisors.com/team/na-hookele-financial-advisory-team/)

A financial advisory practice of Ameriprise Financial Services, LLC

**Areas of focus**

* Wealth Preservation Strategies
* Intergenerational Planning
* Financial Strategies for LGBTQ Couples and Families
* Insurance
* Retirement Planning Strategies
* Investments

**Qualifications**

* CFP® Certified Financial Planner™
* CRPC™ Chartered Retirement Planning Counselor™
* CFS® Certified Fund Specialist
* CLTC® Certified Long Term Care

**Awards & recognition**

* Ameriprise Circle of Success, 2007, 2008-2022
* Five Star Wealth Manager, 2012 - 2017
* Na Ho’okele Financial Advisory Team, Ameriprise Client Experience Award, 2020, 2022

**Professional associations**

* [Financial Planning Association](http://www.fpanet.org/)
* Million Dollar Round Table, Top of the Table
* Million Dollar Round Table, Court of the Table
* Million Dollar Round Table

**Community participation**

* [Toys](http://www.hawaiianhumane.org/) For Tots Hawai’i
* [Food](http://jahawaii.com/) Bank Hawai’i