LAURIS S. LAMBERGS, CIMA®, GFP (USA)®

CO-FOUNDER AND CHIEF INVESTMENT OFFICER OF RENAISSANCE WEALTH ADVISORS, LLC

Lauris Lambergs is an Adjunct Lecturer for Purpose Consulting Group, LLC, a firm focused on developing innovative practice management programs that engage and advance financial professionals. Lauris is an expert in consulting to wealth advisors on client service, business management, and business development.

Lauris is also Co-founder and Chief Investment Officer of Renaissance Wealth Advisors, LLC, a registered investment advisor based in Newton, Massachusetts. By recognizing that each client has a unique family logic in considering and making complex financial decisions, Lauris is better able to partner with families to create and sustain long-term financial well-being. He applies his extensive experience in foreign countries, cultures and languages to working with cross-border families, or those that have financial roots in both the US and elsewhere. Lauris realizes that having ties to other countries can add complexity to financial planning, enabling him to better help clients through these situations.

Previously, Lauris was a Partner at RayLign Advisory, where he consulted complex, HNW families with assets and operating businesses ranging from $5M to $5B to identify their family enterprise needs, design decision-making processes & support family governance, communication and education. Certain client work included education on the family office/wealth management landscape, resulting in the creation/restructuring of the appropriate family office and advisory resources. Prior to RayLign, Lauris spent 10 years in the institutional investment management industry, in a variety of sales and management roles for Bernstein and Columbia Management.

Lauris earned an MBA in International Business from the Riga Business School in Riga, Latvia. He also earned a B.A. in French and Political Science from Duke University. He holds the Certified Investment Management Analyst® (CIMA®) certification, administered through the Investments & Wealth Institute™ and taught in conjunction with The Wharton School, University of Pennsylvania. Lauris also holds the Global Financial Planning (GFP®) and the Certified Health Savings Advisor (CHSA®) designations. Lauris is a member of the Board of Directors for the Investments & Wealth Institute™ where he also serves as Chair of the Investment Advisor Forum planning committee. Lauris serves on the Boards of several Boston-based non-profit organizations.

When he’s not helping clients with their financial well-being, Lauris plays competitive soccer, enjoys classic alternative 80’s music and, thanks in large part to the endless patience of his wife, has somehow learned to appreciate Impressionist art and good red wine.