

Who We Serve

At Beekman Wealth Advisory, four fundamental practices and values guide our firm. These are:

1. “Bookish” mindset: We’re analysts, not salespeople.
2. Operational transparency: Fully disclosed flat-dollar fees only; no conflicts of interest.
3. Straightforward communications: No spin.
4. Education in all we do.

We find that these practices and values are particularly resonant with three different groups of investors. Our clients generally fall into one of the following categories:

The Overwhelmed are newer to investing and tend to find the whole topic frightening and incomprehensible. These investors may be women who have recently been widowed or divorced, or heirs who have just inherited a substantial amount of money. There has usually been someone else — such as a husband — looking after their money, and the job of becoming solely responsible for their own financial well-being comes at a time when they are already feeling emotionally exhausted and/or vulnerable. We find that The Overwhelmed are especially appreciative of BWA’s patient, reassuring, and educational approach to meeting client needs.

The Otherwise-Engaged are usually heirs and entrepreneurs who — though they might be perfectly capable of doing so — prefer not to spend their time evaluating investments and closely monitoring their portfolios. Instead, perhaps they are private art cura-

tors, or sports managers, or nonprofit executives, or writers — whatever their profession, they pursue it with talent and vigor. They want to leave the wealth management to an expert they trust, secure in knowing they’ll have the money they need when they need it. BWA’s analytical approach and straightforward communications tend to be particularly attractive to The Otherwise-Engaged.

Finally, ***The Disillusioned*** are those investors who heard, believed, and invested based upon a glowing sales pitch, most often in a large, institutional setting. Some years later, they’ve recognized that reality has fallen short of the promise. Perhaps returns haven’t met expectations, or client service personnel turnover has been excessive, or investments have been too risky or illiquid, or there has been institutional turmoil, or they’ve been constantly on the receiving end of sales pitches for “hot, new” products — whatever the issue, these investors are ready for a customized experience within a focused firm that acts only in its clients’ best interests. The Disillusioned usually find BWA’s operational transparency, flat-dollar fees, and unbiased analysis and recommendations highly refreshing.

If you know anyone who might fit into one of these profiles — or if you yourself are such a person — we’d be delighted to speak further.



Elizabeth P. Anderson, CFA, is the founder of Beekman Wealth Advisory LLC, a boutique financial consultancy providing highly customized services to families and individuals. Founded in 2003, Beekman Wealth Advisory’s business model reflects its unwavering commitment to the best interests of its clients.