

Item 1. Introduction

Beekman Wealth Advisory, LLC June 30, 2020 Form Client Relationship Summary (CRS)

Beekman Wealth Advisory, LLC is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://www.investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

Item 2. Relationships and Services *What investment services and advice can you provide me?*

We offer investment advisory services to retail investors, defined as natural persons and their legal representatives. Beekman Wealth Advisory operates as a retained Chief Investment Officer for High Net Worth and Ultra High Net Worth individuals, evaluating, recommending, and monitoring investments provided by independent third parties. Beekman Wealth Advisory does not have investment discretion or power of attorney over any client account, and the client makes the ultimate decision about the purchase or sale of investments. Most clients have assets of more than \$10 million, although this is not a requirement.

For additional information, please see Beekman Wealth Advisory's Form ADV Part 2A, available at [adviserinfo.SEC.gov](https://adviserinfo.sec.gov) or www.beekmanwealth.com.

CONVERSATION STARTER: Ask your financial professional:

- *Given my financial situation, should I choose an investment advisory service? Why or why not?*
- *How will you choose investments to recommend to me?*
- *What is your relevant experience, including your licenses, education, and other qualifications? What do these qualifications mean?*

Item 3. Fees, Costs, Conflicts, and Standard of Conduct *What fees will I pay?*

Beekman Wealth Advisory charges only fully-disclosed, flat-dollar retainer fees, agreed in advance with each client. Fees may change over time, but only by prior agreement with the client. Beekman Wealth Advisory bills clients monthly or quarterly in advance. Beekman Wealth Advisory does not charge commissions or mark-ups of any kind and receives no compensation from the sale of any security or investment product.

Clients may also pay additional fees and costs to third parties. Examples of the most common fees and costs paid by our clients are custodian fees, fees related to mutual funds, transaction charges, wire transfer fees, and other account administrative fees. Beekman Wealth Advisory does not share in any such fees.

You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying.

For additional information, please see our Form ADV Part 2A.

CONVERSATION STARTER: Ask your financial professional:

- *Help me understand how these fees and costs might affect my investments. If I give you \$10,000 to invest, how much will go to fees and costs, and how much will be invested for me?*

What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?

When we act as your investment adviser, we have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you. Here is an example to help you understand what this means. Beekman Wealth Advisory's only source of revenue is the retainer fees paid directly by each client. We do not sell proprietary products, receive referral fees, participate in revenue sharing, or buy or sell investments to our clients. We therefore have no financial incentive to recommend any particular investment to our clients. We do have a financial incentive to offer services to new clients.

CONVERSATION STARTER: Ask your financial professional:

- *How might your conflicts of interest affect me, and how will you address them?*

For additional information, please see Beekman Wealth Advisory's full Form ADV.

How do your financial professionals make money?

Beekman Wealth Advisory's financial professionals, other than the owner, are employees of the firm paid on the basis of fixed dollars per hour of work, plus bonuses determined at the sole discretion of Elizabeth P. Anderson, CFA. Our financial professionals do not receive sales commissions. Ms. Anderson owns 100% of Beekman Wealth Advisory.

Item 4. Disciplinary History

Do you or your financial professionals have legal or disciplinary history?

No. Visit Investor.gov/CRS for a free and simple search tool to research Beekman Wealth Advisory and its financial professionals.

CONVERSATION STARTER: Ask your financial professional:

- *As a financial professional, do you have any disciplinary history? For what type of conduct?*

Item 5. Additional Information

For additional, up-to-date information about our services or a copy of this relationship summary, please visit our website at www.beekmanwealth.com or call 212-365-7400.

CONVERSATION STARTER: Ask your financial professional:

- *Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?*