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Top
**Financial
Advisers**

**BEEKMAN WEALTH ADVISORY NAMED TO FINANCIAL TIMES
300 TOP REGISTERED INVESTMENT ADVISERS**

FT 300 Ranking

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http://beekmanwealth.com/wp-content/uploads/2016/06/2016_FT_300_One_pager_FINAL_for_website.pdf

CORE SERVICES

*CIO Portfolio
Management*

[\(core-
services/cio-
portfolio-
management\)](#)

*Wealth
Education*

[\(core-
services/wealth-
education\)](#)

*Portfolio
Analysis
Projects*

[\(core-
services/portfolio-
analysis-
projects\)](#)

“Price is what you pay; value is what you get.” – Charlie Munger, Berkshire Hathaway

FIRM STRENGTHS

Relationships

No-spin policy

Transparency in all we do

Focus

Sole emphasis is on clients' best interests

Active listening

Thorough understanding of individual client needs

Research / Insights

Analytical and educational approach

Our goal is to control the controllable

Perspective

Industry veterans bring experience, professional and academic credentials

Results

Practical, logical recommendations with straightforward execution

Collaborative relationships built on mutual trust

Absolute returns

Our goal is to make sure you have the money you need, when you need it

Full retention of CIO clients since inception

Reflects high satisfaction level

Service

High-quality touch points with a top team of professionals

Proprietary manager analytics


Complex quantitative analysis presented in an intuitively understandable format

Communications

Offer thought-leadership ideas and best practices in educational white papers, learning modules

An approach intended to generate more consistent returns

Protective "lose less" philosophy helps win over time

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