



**Jeffrey Cone, CFA®,
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Chief Investment Officer

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Jeff joined BEAM Wealth Advisors in 2022 as the Chief Investment Officer. His diverse financial markets experience includes roles as a bank examiner, institutional

equity research analyst, and Chief Investment Officer for a large Ameriprise Private Wealth practice. Jeff is a CFA charterholder and CAIA charterholder.

Jeff's uses a prudent approach to investment management. He builds portfolios from a risk management perspective, helping avoid large drawdowns in asset prices. Jeff's background in economics allows him to identify macroeconomic risks in a timely manner, helping guide the asset allocation decision. Jeff considers diversification essential; holding a collection of assets whose performance varies at different times is the hallmark of an efficient portfolio.