



Jeff Cone, CFA®, CAIA®

Chief Investment Officer

Jeff brings to BEAM/BGA Wealth a decade of experience in wealth management which he uses to lead our Investment Committee, design investment portfolios, and oversee trading operations. Jeff has held a variety of positions in the financial services industry, including his time as a Bank Examiner for the Office of the Comptroller and an International Equity Analyst for a large pension fund in Ohio. He most recently served as Chief Investment Officer for a top Ameriprise firm with over \$1 billion in assets, where he was nationally recognized for his stand out risk-adjusted returns.

Jeff's unique background in finance and economics allows him to identify key macro risks and opportunities that drive asset prices. Jeff graduated summa cum laude from Arkansas State University and is both a Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA). Jeff regularly shares his market insights with clients via the BEAM/BGA Wealth quarterly market commentary and periodic webinars. Jeff enjoys spending time outdoors, especially if he is on a lake or a mountain. He lives in Columbus, OH with his goldendoodle, Draco.

The Chartered Financial Analyst designation (CFA) is **globally recognized** as the **gold standard** for investment management professionals.

Over 31,000 investment firms worldwide consider the CFA charter as their professional standard of choice.

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