Overview

Sophisticated Financial Advice, Delivered with Simplicity

Quick Facts

- Registered investment adviser
- Comprehensive financial planning and investment advisory services
- Fiduciary
- $1 million minimum account
- Fee only

What's Different?

- Sophisticated financial advice, delivered with *simplicity*
- Focus on the few variables that govern successful long-term financial outcomes
- Precise, evidence-based, actionable answers

Fees

- 1% of assets up to $4 million; flexible pricing for larger accounts

Custodian

- Charles Schwab & Co., Inc.

Typical Client

- Successful people navigating the financial implications of life transitions
- Value simplicity, precision and clarity

Timothy J. Keating Vitae

- 34 years Wall Street experience
- 1985 Harvard College, *cum laude*
- Keating Investments, LLC (founded 1997, sold 2014)
- Previous: Bear Stearns; Nomura; Kidder, Peabody

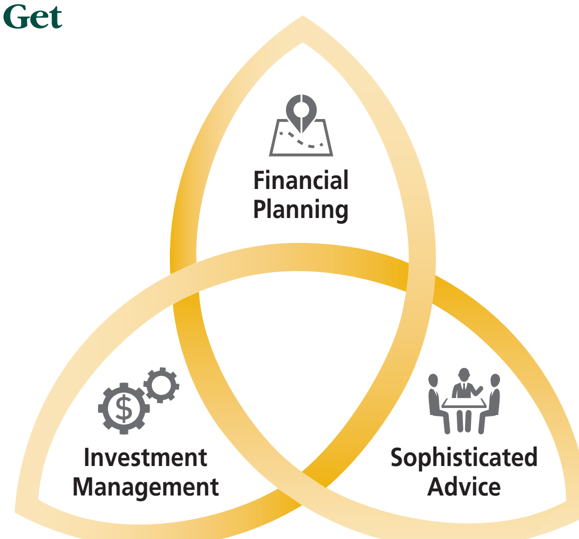
Keating Wealth Management

Keating Wealth Management, LLC is a financial planning and investment advisory firm that provides sophisticated financial advice, delivered with simplicity, to successful people navigating the financial implications of life transitions.

Unlike many financial advisers, who focus on irrelevancies and discredited conventional thinking, we forcefully advocate an investment philosophy that focuses solely on the few variables that actually govern successful long-term financial outcomes.

Instead of complexity and confusion, we provide precise, evidence-based, actionable answers—bringing you the peace of mind that comes from knowing you are on track to achieve your financial goals.

What You Get



Our Value Promise

We'll take care of everything related to your financial planning, so you can live your life. Your financial affairs will be consolidated and the complexity eliminated, and you'll be able to easily understand it all. You'll enjoy a clear, actionable, continuously updated plan that simplifies your life transitions. And, ultimately, you'll rest easy knowing that you are on track to achieve your financial goals.

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