



## Sponsor SPOTLIGHT

Klein Wealth  
Management High Tower



Peter J. Klein, CFA dove into the financial services industry before he even turned 21—since then he has become a widely recognized name in the industry. Peter is extremely dedicated to his work and says it is his joy being able to share the success of his clients. His passion working with various philanthropic organizations has provided the impetus towards a focus in the intersection of wealth management and philanthropy. Peter has also been the author of three books, his most recent being *A Passion for Giving: Tools and Inspiration for Creating a Charitable Foundation* (Wiley, 2012).

Peter graduated from SUNY Stony Brook in 1987 with a Bachelor degree in Economics, and later earned a Master in

Business Administration in Finance from CUNY Baruch in NYC. Klein is a Chartered Financial Analyst® (CFA) and a Chartered Retirement Plan Specialist® (CRPS) and a candidate for the CAP (Certified Advisor in Philanthropy) designation. In November of 2013, Peter made the decision to join Hightower Advisors as a partner and head of his own team- Klein Wealth Management. He is a managing director and along with his team headed by Jane Voorhees, CFP who has been working with Peter for more than 20 years focus on providing clients excellence in fiduciary wealth management & stewardship.

Klein Wealth Management focuses on comprehensive wealth management solutions. Peter has said “at Klein Wealth Management, we are motivated to provide the very best financial advice to our clients.” As a steward to the boards of foundations & endowments, Klein Wealth Management is intimately involved in their philanthropic mission. Klein states, “I live and breathe the markets. I want my clients—to know I’m passionate about this business. But most importantly, I want them to know that that passion translates to proactive empathy and an unceasing dedication to managing their portfolios and my fiduciary responsibilities.”

Peter is not only dedicated to his work at Hightower, but also to the many other philanthropic organizations that he is a part of. He is privileged to serve as President of the Claire Friedlander Family Foundation, as well as on the board of: The Holocaust & Tolerance Center of Nassau County, The Long Island Community Foundation, The Dante Foundation, Cold Spring Harbor Laboratory Association, Splashes for Hope, Life’s WORC & The Family Center for Autism, The Tilles Center for Performing Arts, The Dante Foundation, Bronx High School of Science and Alumni Association, and their Endowment Committee.

Klein believes that wealth management is described best using the following equation:  $WM = IC + AP + RM$ .

Where:

IC: Investment Consulting is having the skill set to look

under the hood, to peel back the onion and find opportunities that others miss. Klein Wealth Management focuses on the science of investment management and has made considerable efforts to become students of the business—understanding the markets and the economy are critical components to their practice.

AP: Advance Planning - Over the decades, their clients have said that four major aspects of their financial lives are most important to them: Wealth Enhancement, Wealth Transfer, Wealth Protection and Charitable Giving.

RM: Relationship Management – At Klein Wealth Management, they are stew-

ards for their clients’ financial affairs and as such they coordinate much of the planning—interfacing with their client’s other advisors—from their attorneys to their tax specialists. Keeping everyone on task and maintaining communication with their clients—so that nothing falls through the proverbial cracks and the comprehensive wealth management plan gets done.



One of the items on your  
list just got a lot less  
complicated.

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