Welcome Brochure

AKD | Wealth Partners

ADVICE | KNOWLEDGE | DISCIPLINE

Valiant Partners In Your Multi-Generational Wealth Journey.

AKD Wealth Partners of Wells Fargo Advisors Financial Network is an independent respected financial advisory team located in the heart of New York City. As a boutique practice of Wells Fargo Advisors Financial Network we proudly present the services of AKD Wealth Partners. With over $1 billion in assets under management as of 12/31/23, we provide a select group of high-net worth and ultra-high net worth clients a superior experience through a focused, team-oriented approach modeled after a family office.

We formed AKD with a singular vision:

> ***To redefine multi-generational wealth management by co-creating tailored strategies that empower clients to make their financial goals a reality, demystifying the complex world of finance to help clients confidently navigate their financial future.***

Every day, we show up inspired by our single-minded determination to maximize the financial health and well-being of our valued clients, each of whom has their own unique stories, dreams, and goals.

Ensuring that every client feels informed, understood, and empowered not only builds deep, trust-based relationships but also enables us to offer professional guidance. We demystify the complex world of finance, connect the financial dots, and craft holistic, multi-generational financial solutions.

Recognized by Forbes

Stephanie Ackler was recognized by Forbes as the Forbes Best-In-State Wealth Advisors* for each year from 2019 to 2024.

Robert Karp was recognized by Forbes as the Forbes Best-In-State Wealth Advisors* for each year from 2019 to 2023.

*2024 Forbes Best-In-State Wealth Advisors: Awarded April 2024; Data compiled by SHOOK Research LLC based on the time period from 6/30/22 – 6/30/23 (Source: Forbes.com). 2023 Forbes Best-In-State Wealth Advisors: Awarded April 2023; Data compiled by SHOOK Research LLC Based on the time Period from 6/30/21 – 6/30/22 (Source: Forbes.com). 2022 Forbes Best-In-State Wealth Advisors: Awarded April 2022; Data compiled by SHOOK Research LLC Based on the time Period from 6/30/20 – 6/30/21 (Source: Forbes.com). 2021 Forbes Best-In-State Wealth Advisors: Awarded February 2021; Data compiled by SHOOK Research LLC Based on the time Period from 6/30/19 – 6/30/20 (Source: Forbes.com). 2020 Forbes Best-In-State Wealth Advisors: Awarded January 2020; Data compiled by SHOOK Research LLC Based on the time Period from 6/30/18 – 6/30/19 (Source: Forbes.com). 2019 Forbes Best-In-State Wealth Advisors: Awarded February 2019; Data compiled by SHOOK Research LLC Based on the time Period from 6/30/17 – 6/30/18 (Source: Forbes.com). The Forbes Best-in-State Wealth Advisors rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Members SIPC. AKD Wealth Partners is a separate entity from WFAFN.

Client Centric. Listening Driven.

At AKD Wealth Partners, your confidence is our top priority. Our advanced expertise comes from a client-centric approach rooted in understanding your unique financial life and goals.

Our founding partners hold prestigious designations including the CFA® (Chartered Financial Analyst®) and CERTIFIED FINANCIAL PLANNER® certifications; credentials that demonstrate our team's dedication to mastering the latest financial strategies and technical nuances so we can provide you with optimal guidance.

Yet, credentials alone don't tell the whole story. By taking the time to listen first, we uncover what matters most to your financial wellbeing so we can tailor holistic recommendations you can truly believe in. We believe this is the AKD difference - combining human insight and advanced technical excellence to earn your complete confidence.

> The intelligent investor is a realist who sells to optimists and buys from pessimists.
>
> — **Graham & Dodd**

Personalized Wealth Planning for Every Chapter

Life is full of important moments that shape our finances. During these transitions, our team is here to listen, understand, and empower your financial future.

We believe your investments should reflect your unique life story. So we take the time to listen to what matters most, whether it's new income, and inheritance, equity monetization, business sale, or retirement. We connect your personal values, life milestones, and smart financial strategies just for you.

Our clients trust us to turn complex moments into clear, customized plans to reach their goals with confidence, and together, we transform uncertainty into a powerful financial vision and investment approach tailored to your dreams.

Above all, we see every transition as a fresh start. An opportunity to shape your financial future, pursue your greatest inspirations, and serve your best interests with insight, integrity, and caring purpose.

Equity Compensation Plans

For corporate executives, we offer highly personalized guidance on equity compensation and concentrated positions. With decades of experience serving over 100+ issuers and thousands of executives, we understand the complexity executives face in managing equity.

Our tailored guidance provides clarity and confidence when navigating concentrated positions, equity vesting schedules, hedging decisions, 10b5-1 plans, and diversification strategies. We take a comprehensive, long-term view to advise customized solutions across your equity plans, stock options, restricted assets, and holdings. Listening first with an open and empathetic ear, we help secure your future while aligning your equity wealth to what matters most. Ultimately, our goal is to simplify the complex components so you can focus on leading your organizations forward.

Wealth Management Services

Overview

Our highly experienced team offers you access to a suite of family office services in a boutique environment inside a global financial company.
Once we have a clear understanding of your goals and values, we help you manage your wealth utilizing the appropriate solutions from a wide range of services:

Investment Solutions

- Holistic Wealth Management
- Discretionary Portfolio Management
- Customized Managed Portfolios
- Socially Impactful Strategies
- Exchange-Traded Funds
- Mutual Funds
- Fixed Income
- Liquidity Management
- Alternatives
- Hedge Funds

Investment Planning

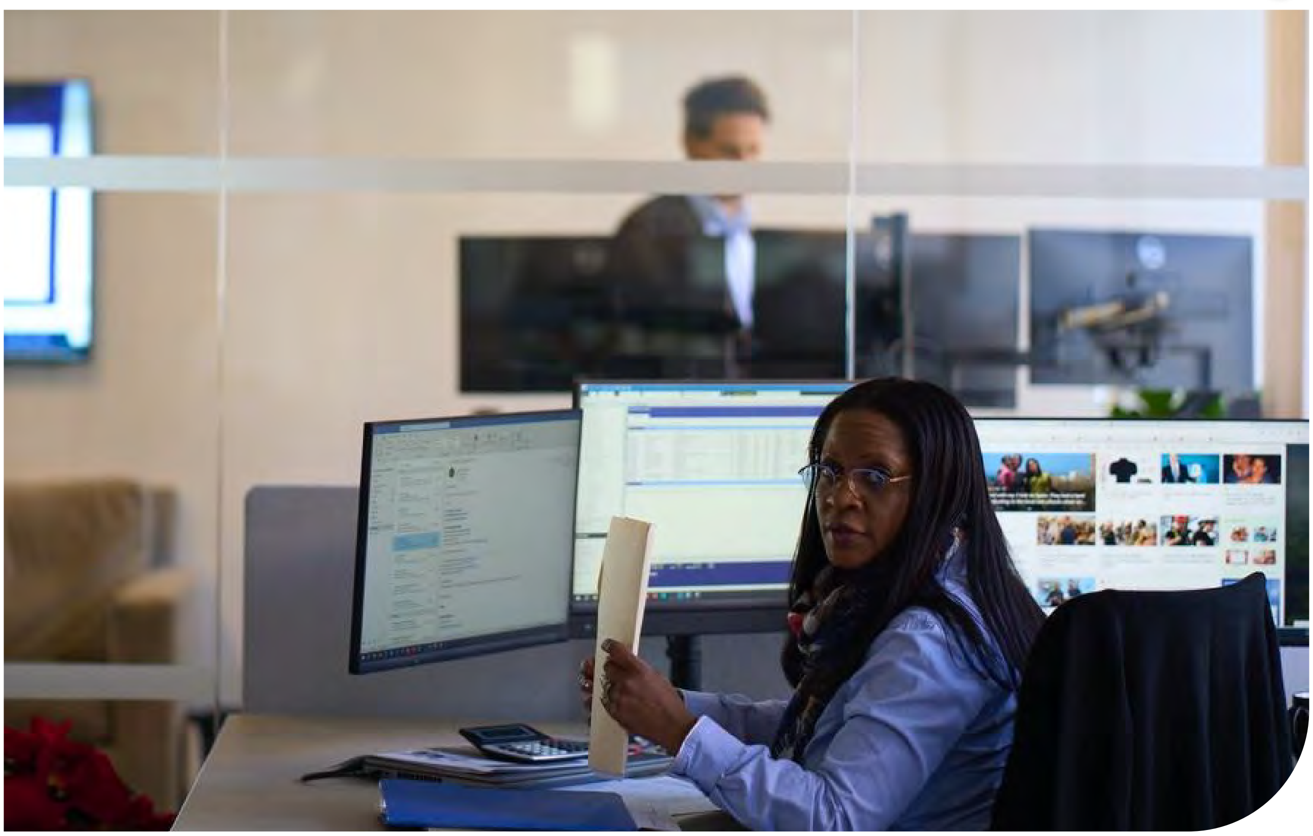
- Estate Planning Strategies
- Philantropic Planning
- Tax-Efficient Strategies
- Retirement Planning
- Education Funding
- Financial Wellness
- Risk Management
- Family Wealth Transition Planning
- Closely Held Business Planning

Corporate Executive Services

- Employee and Executive Benefits
- Corporate Retirement Plans
- Concentrated Stock Management
- Pre- and Post-IPO Strategies
- Exchange Funds
- 10b5-1 Plans
- 401(k) Implementation and Consulting
- Stock Options Strategies
- Hedging Strategies
- Form 144
- Financial Wellness

Additional Services

- Client Education
- Multi-Generational Conversations
- Donor-Advised Funds
- Transition Planning for Women: Marriage, Divorce, Business § Carreer
- Insurance*
- Eldercare
- 529 Plans



Insurance products are offered through nonbank insurance agency affiliates of Wells Fargo & Company and are underwritten by unaffiliated insurance companies.

Please consider the investment objectives, risks, charges and expenses carefully before investing in a 529 savings plan. The official statement, which contains this and other information, can be obtained by calling your financial advisor. Read it carefully before you invest.

Our mutual responsibilities

Effective communication and mutual respect are vital for successful relationships. Trust, transparency, and commitment form the foundation of our ethics. We value these principles in our relationship and expect the same from you. Collaborative investment planning is key, and prioritizing your financial strategy is our commitment. Regular reviews and updates of your Financial Strategy Action Plan are crucial. Our planning is adaptable and grows with you, always centered on your best interests. Your active participation in the investment planning process is essential and appreciated.

> **The highest compact we can make with our fellow is, ‘Let there be truth between us two forevermore’.**
>
> — **Ralph Waldo Emerson**

As your advisory partners, we foster deep, trust-based relationships with our individual and family clients, offer professional guidance, and steer them through the intricate maze of wealth, making the complex world of finance feel accessible. We connect the financial dots, craft holistic multi-generational solutions, and co-create portfolio strategies tailored to resonate with their distinct goals, while respecting their risk boundaries and core values...

The AKD Team

What you can expect from us

You can trust that we will consistently and responsibly perform all the services you request of us, and that we'll be available when you need us.

- You will be treated with respect, honesty, and dignity
- Our team members will act as your advisors, always putting your interests first
- We will strive to acquire a complete and accurate understanding of your goals, your tolerance for investment risk, and your time frame
- Your advisor will explain the implications of all proposed strategies
- Depending on your preference, you will be updated by email, mail, and/or phone
- Our team will meet with you to review your Financial Strategy Action Plan

Stephanie Lynn Ackler

CFA®

PRESIDENT & CO-FOUNDER.

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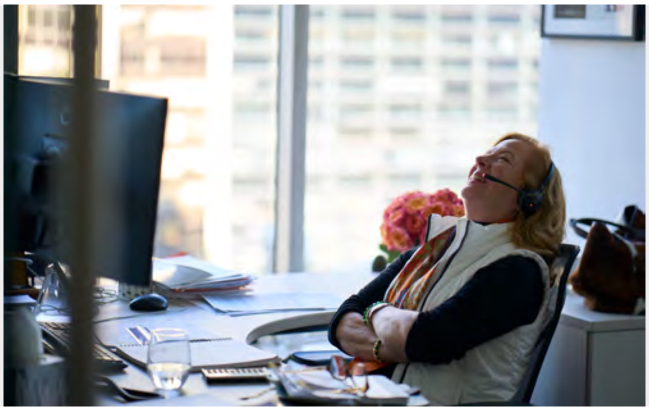

STEPHANIE'S STORY

In March 2023, with nearly four decades of experience in financial services as a Private Wealth Financial Advisor, I had the privilege of co-founding AKD Wealth Partners with my esteemed colleague Robert Karp, CEO, Managing Partner. Our shared vision was both simple and profound - to revolutionize multi-generational wealth management and simplify the complexities of the finance industry, empowering our clients to confidently navigate their financial journeys. By collaboratively developing customized strategies, our goal is to transform our clients' financial dreams into concrete realities.

As a Chartered Financial Analyst®, I am excited about the opportunity to foster and utilize the relationships and synergies within our firm's extensive network. This network includes professionals in trust, money management, liability management, and estate planning. This interconnectedness allows me to create customized strategies that align with the unique needs of our clients. My approach, which focuses on providing personal attention and professional guidance, goes beyond simply analyzing numbers. It involves crafting a financial narrative that reflects the individual story of each client we have the honor of serving.

At the core of my role, I am a Senior PIM Portfolio Manager. My team and I take great care in managing investment portfolios with discretionary control. We believe in providing a comprehensive approach to wealth management, making the complex world of investment opportunities easier to understand and navigate. With clear communication, unwavering confidence, and a well-planned roadmap for the future, we guide our clients through the constantly changing landscape of finance. Our goal is to ensure that their financial journey is smooth, graceful, and a harmonious blend of expertise and creativity.

What Motivates Me

The reason I love what I do is because it brings me great joy to help our clients with their financial futures and guide them towards the lives they've always dreamed of. It's about empowering them to support the causes they care about and leave a lasting legacy that reflects their values. Being recognized by Forbes* as the Best in State Wealth Advisor from 2019 to 2024 is not just an honor, but a confirmation that my dedication to providing personalized financial advice that truly matters is making a positive impact.

Life Outside Work

Life beyond the financial realm is just as exciting and captivating. I am passionate about organizations that are devoted to empowering women and girls, and I am proud to be a member of the Financial Women's Association of New York and the Women Presidents Organization. I have had the privilege of holding various leadership positions within these organizations.

I love to expand my horizons through travel, especially when I embark on international adventures that give me the opportunity to fully experience different cultures and economic landscapes. Every journey I take is not just a simple trip, but a quest for a deeper understanding and a unique chance to witness firsthand the intricate dynamics of the global economy. My travels have not only enriched me personally but have also brought a more nuanced, global perspective to my approach in wealth management, enabling me to understand and navigate the intricacies of the global financial ecosystem better.

My academic journey began at the Northfield Mount Herman School and concluded at Franklin and Marshall College, where I earned a BA in Chemistry. This educational experience helped shape my analytical thinking.

Nowadays, my home in Manhattan is a joyful sanctuary, shared with my loving husband, Peter, our two extraordinary sons, Sam and Will, and our playful Labradoodle, Abbey, who brings a furry dose of happiness to our lives.

> *My passion is helping clients manage not just their financial futures, but to live the lives they've always dreamed of, impacting the causes they are most passionate about, and protecting their legacies.*

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Robert Karp

CFP® CRPC® AIF®

CEO, MANAGING PARTNER.

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212.205.2875

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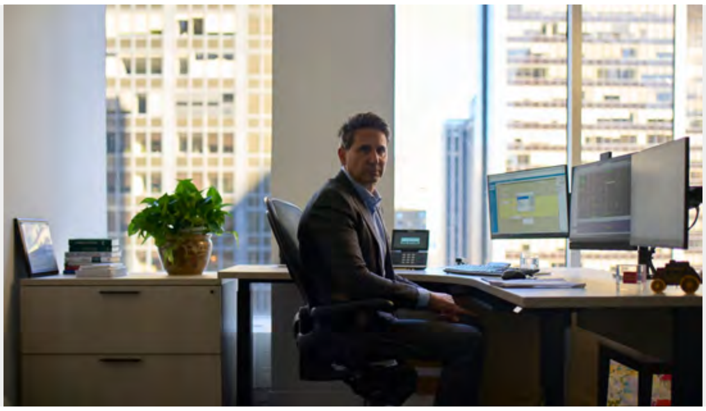

ROBERT'S STORY

I am the founding partner of AKD Wealth Partners of Wells Fargo Advisors Financial Network, and 21-year Wells Fargo Advisors veteran. As the CEO and Managing Partner, I spearhead our team's Planning and Private Wealth Management, arranging the financial strategies that reflect our clients' directives. My journey, spanning over 30 years as a Financial Advisor, has been both inspiring and fulfilling. I have had the privilege of working with my team niche, both active and retired Corporate Executives, Directors, and Institutions, guiding them through both simple and complex planning, concentrated stock scheduling, Family Dynamics, Wealth Management, and Wealth Transfer strategies.

As a CERTIFIED FINANCIAL PLANNER™ practitioner, Chartered Retirement Planning Counselor(SM), and Accredited Investment Fiduciary® the heart of my work lies in carefully organizing and structuring our clients' financial matters, combining the elements of a family office with personal CFO strategies. Using Wells Fargo's advanced planning tools, my team and I meet with clients to review progress toward achieving their financial goals, combined with managing their assets, planning for charitable contributions, facilitating family involvement, devising estate planning strategies, and effectively managing their balance sheets. I have been awarded Forbes Best-In-State Wealth Advisors 2019. 2020, 2021, 2022, 2023 and 2024*. I hold the Series 7, 31, 63, and 65 securities registrations as well as insurance licenses.

Industry History

- Prior to joining Wells Fargo Advisors, Robert ran a Municipal Bond consulting team at Oppenheimer & Co. from 1992-1997.
- In 1997, Robert's team joined UBS, adding corporate and executive planning to his team's offering.
- In 2001, Robert and his team joined Wells Fargo Advisors, expanding the group's planning and executive services capabilities. The Karp Executive Stock Plan team is formed and quickly becomes one of the largest providers of Corporate and Executive Services within Wells Fargo Advisors Financial Network.
- In 2023, AKD Wealth partners is formed through the tactful merger of two of the largest WFA NYC teams, Barons Veteran and longtime colleague Stephanie Ackler (President of AKD) and Karp Team, adding additional breath, experience and leadership to the practice.

Life Outside Work

I graduated from the State University of New York with a bachelor's degree in Accounting and a Finance concentrate. Outside of my professional life, my family, community, daily personal fitness, and travels occupy the majority of my time.For the past 30 years, I have been an active member of my community, North Battery Park City/Tribeca in lower Manhattan. I enjoy splitting time and work between Southampton, NY and Miami, Fl with my wife Stacey and three children: Holyn, Hutch and Kruse. My two oldest children attend Poly Prep Country Day School. Tennis is my family's primary sport and my oldest daughter Holyn is a USTA Nationally ranked Jr tennis player. As such, I travel the country with her to various National tennis events.

> *I enjoy mentoring my peers, providing them with resources and also offering investment planning services to various not-for-profits. It enhances my professional growth by giving back to the community and the industry I grew up with.*

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Vincent DeSimone

CFP® CRPC® AIF®

MANAGING DIRECTOR, PARTNER.

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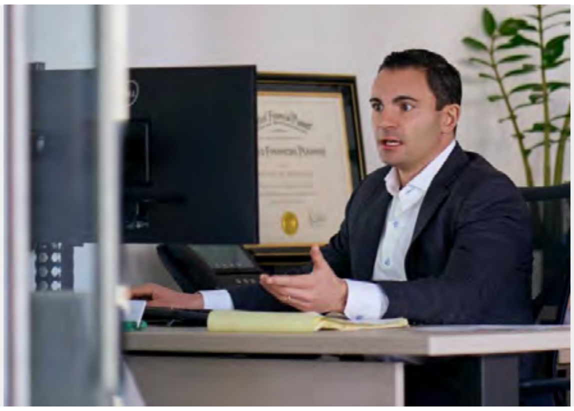

VINCENT'S STORY

For twenty years, I've had the privilege of guiding clients and their families towards their long-term financial goals. Being a CFP® practitioner I have the tools and expertise to help clients navigate the complex world of financial decisions to achieve a state of financial well-being. My expertise covers investment planning, wealth management, equity and executive compensation, insurance, estate planning strategies, and retirement planning, all wrapped in a comprehensive approach.

My journey began as an intern in 2003 and blossomed into a full-time commitment after graduating in 2005. As a co-founder of AKD Wealth Partners, our strong bond and shared vision fuels my passion and client-focused approach, allowing us to offer a wide range of services and capabilities to both individuals and businesses.

I oversee the team's corporate and executive services offering with extensive insight and experience in equity and executive compensation structures. Over two decades, I have worked with thousands of executives and directors and over one hundred issuers. With the vast resources of Wells Fargo Advisors Financial Network (FiNet) at my disposal, I create equity compensation plan solutions that align with each executive's needs while mindful of their corporate culture. From Rule 10b5-1 trading plans to hedging strategies and concentrated position analysis, each task brings us closer to achieving financial clarity and effectiveness.

What Motivates Me

My motivation comes from the rewarding experience of guiding clients and their families towards a future filled with financial confidence and prosperity. Unraveling the complexities of wealth planning for those clients I serve is not just as a professional engagement, it's a rewarding experience, building trust, and respect on a shared journey towards long-lasting financial wellbeing, protecting legacies, and nurturing financial growth for future generations. Every client has a unique story, a dream in waiting, and it's the effort in turning these dreams into tangible realities that keeps my professional passion alive.

Life Outside Work

Outside of work, my time is filled with my young family's sports schedule, parties, and travel. I live in Ridgefield, CT with my wife Marisa, daughter Mariana, and son Miles. Fitness is my sanctuary, and I enjoy the early morning quiet of a long-distance or trail run or weight training. I relish the camaraderie of my local men's league ice hockey team and the concentration of the golf course. My wife and I love cooking together with our kids, and I am an avid reader. I graduated with top honors from the Stern School of Business at New York University where I pursued a double major in Finance and Marketing. I also was a member of the Men's Ice Hockey team. This rigorous academic, sports, and New York City environment built the foundation of my professional journey and led me to my career. I hold several securities registrations—backed by Series 7, 9, 10, 63, and 65—as well as insurance licenses. I also have attained the valued designations of CFP®, Chartered Retirement Planning Counselor(SM), and AIF®, Accredited Investment Fiduciary®. A life-long learner, I am dedicated to continuous personal and professional growth.

> *We are the only FINET practice headquartered in NYC, the financial capital of the world. We have access to a variety of the resources and relationships on our doorstep. It matters. Especially to CEOs, CFOs, and C-suite executives.*

Andrew Bennett

CFP®

VICE PRESIDENT, FINANCIAL ADVISOR

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212.205.2983

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ANDREW'S STORY

As a Financial Advisor at AKD Wealth Partners, I am committed to meeting clients wherever they are on their financial journey. I consider my role akin to that of a navigator, guiding clients through the financial seas and assisting them in reaching their long-desired goals. My approach is rooted in education and assistance, aiding and collaborating with investors to craft investment strategies and implement tactics.

My life as a sailboat racer has honed my ability to adapt to prevailing conditions, and emphasized to me the importance of surrounding oneself with the right people and resources—an ethos I bring to my work at AKD.

Through rigorous analysis, I continually seek opportunities to bolster our clients' portfolios. I hold securities registrations — Series 7 and 66 as well as insurance licenses.

What Motivates Me

My motivation stems from the profound understanding that judiciously managed finances have the power to positively transform individual lives and communities.

This understanding was cultivated during my academic journey at George Washington University, where I earned a Bachelor's degree in Business Economics and Public Policy. The lessons learned there continue to fuel my dedication to not only managing our clients' financial futures but enabling them to live the lives they've envisioned, support the causes close to their hearts, and secure their legacies.

Life Outside Work

My roots are in Portland, OR. My minor in Art History enriched my appreciation for creativity and carved out a space for my own artistic endeavors.

My love for sailing began in middle school, eventually leading me to captain my high school team. This love propelled me through the collegiate level, where I was honored to serve as the fleet captain for a nationally ranked team for three years. The experience didn't just end there; I extended my love for sailing by coaching high school sailors in Portland and Christmas Cove, ME.

Now residing in New York, my journey continues both on the waters and through the city's rich cultural tapestry. My leisure time is often spent cycling through the landscapes of the city, exploring its many museums and galleries, and seeking avenues to support the local sailing community. Each adventure, whether on land or sea, enriches my life, giving me fresh perspectives and insights that I carry into my professional realm at AKD Wealth Partners.

> *My father's passion for classic cars introduced me to the joy and fulfillment that comes from creating a plan and patiently executing it to completion—a lesson that resonates with my professional role at AKD.*

Patrica Strathearn

SENIOR REGISTERED CLIENT ASSOCIATE

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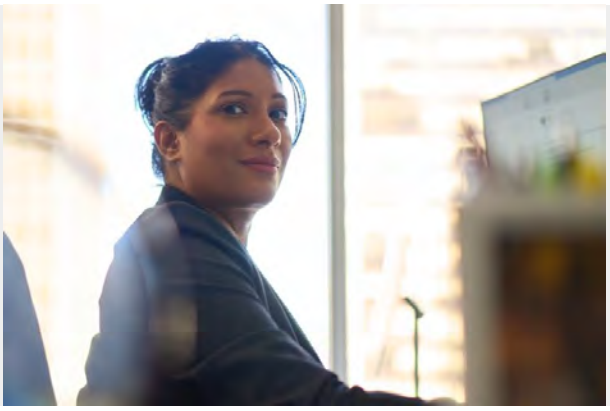


PATRICIA'S STORY

I'm responsible for marketing, client management, and team support at AKD Wealth Partners. With more than 15 years of experience in the financial services industry, I've dedicated my professional journey to meeting the wealth management needs of our valued clients and their families.

At AKD, I take great care in overseeing all client operations on a daily basis. Whether it's processing distribution requests or managing new accounts, I'm committed to delivering attentive and personalized service that aligns with each client's individual financial situation.

What Motivates Me

The foundation of my motivation is rooted in the deep understanding of the positive impact that a well-planned financial strategy can have on the lives of our clients.

My journey began after graduating with a bachelor's degree in Economics from Baruch College in New York City. It took me through respected institutions like MassMutual/Fifth Avenue Financial, Merrill Lynch, and Janney Montgomery Scott, with each experience strengthening my commitment to providing exceptional, personalized service in managing client accounts. Now, as a member of AKD Wealth Partners, our focus on getting to know our clients on a personal level and aligning investment strategies to help them achieve their goals truly resonates with my professional values.

Life Outside Work

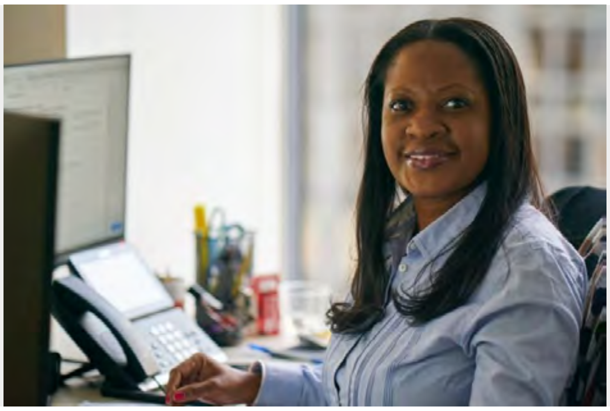
Residing near the heart of New York, with my husband, provides us with the chance to fully immerse ourselves in the city's lively culture and never-ending discoveries.

My passion for culinary experiences is evident both in my own kitchen, where I thoroughly enjoy cooking, and in the diverse array of dining options available throughout the city. I take great pleasure in exploring new restaurants and indulging in the wide variety of global cuisines that the city has to offer. New York's captivating charm often leads me to enjoy a play, while my love for travel and photography enables me to capture the essence of new destinations and experiences.

I consider life an adventure. Whether seen through the lens of my camera, or experienced through travel, or shared amidst the laughter of friends and family, it enhances my outlook on life and my ability to understand and serve our clients.

> *The foundation of my motivation is rooted in the deep understanding of the positive impact that a well-planned financial strategy can have on the lives of our clients.*

Kelly-Ann Lazare



SENIOR REGISTERED CLIENT ASSOCIATE

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212.205.2993
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KELLY-ANN'S STORY

I was fortunate to start my career in the financial services industry on the beautiful Caribbean island of Dominica, working with Barclays Bank. In 2010, I joined Morgan Stanley as a Client Associate, furthering my financial services experience. I became a part of the Karp Executive Wealth Management Group when I joined Wells Fargo Advisors in 2012 as a Registered Client Associate.

Now, as the Senior Registered Client Associate at AKD Wealth Partners, I am proud to bring a wealth of service and operational excellence to our esteemed team. My dedication and hard work were recognized when I received the Golden Spoke Champion award from Wells Fargo Advisors in 2019. The Golden Spoke award is given to team members for their service and commitment to the vision, values & goals of the Firm. Since 2012, I have been leading our team's relationship with lending and banking divisions through Wells Fargo affiliates. As a liaison between our clients and other banking units at Wells Fargo, I ensure seamless communication and problem resolution, making me an integral link to the Family Office experience.

What Motivates Me

Helping our clients achieve financial security and empowerment is what drives me every day.

Being able to bridge gaps, solve problems, and ensure smooth operations for our clients is not just a role for me, but a fulfillment of a larger purpose. The ever-evolving challenges in the financial sector keep me engaged and eager to learn, adapt, and deliver excellent service to our clients.

The culture of collaboration and shared vision at AKD Wealth Partners further fuels my motivation to contribute towards our collective goal of client satisfaction and financial success.

Life Outside Work

Outside of the exciting world of finance, I enjoy the adventure that life has to offer. Together with my wonderful husband, Ivor, we make it a priority to explore the countless wonders of New York City and its surroundings. Whether it's getting lost in a captivating book, traveling to new and unexplored places, or immersing ourselves in nature, each experience is a journey filled with discovery and joy.

My educational journey took me to the University of the West Indies and later led me to earn an MBA from the University of Phoenix. The knowledge I gained, along with my life and health insurance licenses, as well as Series 7, and 66 registrations, strengthen my professional competence and ensure that I am well-equipped to serve our clients with expertise and integrity.

> *Helping our clients achieve financial security and empowerment is what drives me every day.*

Michael Lee Ernst

SENIOR REGISTERED CLIENT ASSOCIATE

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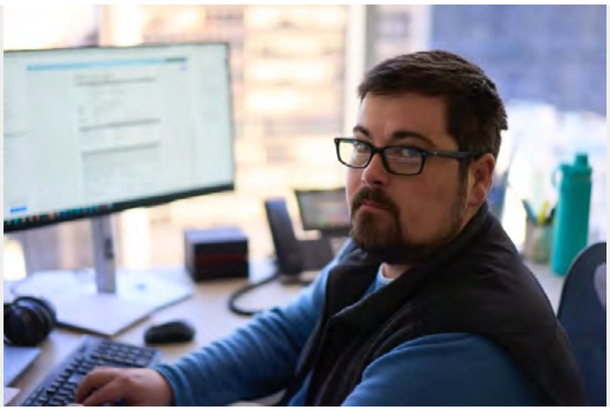

MICHAEL'S STORY

I have the privilege of serving as the Senior Registered Client Associate at AKD Wealth Partners. My main focus is spearheading marketing and communications and working hard to create a cohesive and captivating story for our clients and stakeholders. Additionally, I provide support to Patricia Strathearn and Kelly-Ann Lazare (Senior Registered Client Associates) in Client Services, always striving for excellence to ensure our clients have an exceptional experience.

I have been a part of the Wells Fargo & Company family since 2016, and throughout that time, I have taken on various roles that have given me a well-rounded understanding of the financial services landscape.

My role gives me the chance to combine creativity with financial expertise in marketing and communications, which I find both exciting and fulfilling.

What Motivates Me

My motivation is fueled by my drive to create meaningful and impactful interactions between our clients, the financial strategies we offer at AKD and the positive impact that well-planned financial strategies can have on the lives of our clients.
Each day we work together as a team with the common goal of enhancing our clients' financial journey, simplifying the world of finance, and empowering them to make educated decisions that align with their goals.
I graduated from Radford University with a BBA in Finance, complemented by a minor in Economics. The knowledge acquired provided a solid foundation as I transitioned into the professional realm, initially as a Retail Support Representative and later as a Collector at Ascend Federal Credit Union. Now, with Series 7 and 66 security registrations alongside applicable insurance licenses under my belt, I am well-equipped to facilitate and support the team at AKD Wealth Partners in enhancing the financial health and well-being of our valued clients....

Life Outside Work

Beyond the financial corridors, I'm actually a huge fan of nature and the great outdoors! In fact, I'm an active member of the Tennessee Chapter of the Nature Conservancy and the Tennessee Trail Association, and passionate about preserving nature and enjoying outdoor activities. On weekends, you'll often find me exploring the trails, playing soccer, or having fun game of cards with friends.

Music is important to me, with the violin being my instrument of choice, offering me a creative way to express myself. Volunteering is an aspect of my life that brings me joy. The opportunity to give back to the community and make a positive impact aligns perfectly with both my personal, and AKD's values.

> *Volunteering is an aspect of my life that brings me joy. The opportunity to give back to the community and make a positive impact aligns perfectly with both my personal and AKD's values .*

Samuel Chapin

CLIENT ASSOCIATE

Send a message
212.433.1826
Linkedin

SAMUEL'S STORY

I am the latest addition to the AKD team. As a Client Associate, my role is to be a friendly voice, answering calls and assisting in preparing account reviews and e-money plans.
Being a digital native, I will use my expertise to boost AKD's presence on social media.

Having recently graduated from Oberlin College and the Dalton School, I am now part of AKD's commitment to ensuring our clients always have a full support team as we continue to grow. I will closely work with Michael Ernst, Senior Registered Client Associate, to become proficient in the role of client relationship manager.
Additionally, I am studying for my upcoming Series 7 and 66 securities registrations to deepen my knowledge of the industry and my responsibilities at AKD.

Life Outside Work

During the weekends, you'll find me decompressing by watching basketball or football, delving into history, or enjoying board games with friends.

> *I am driven by a hard work ethic, a principle instilled in me by my family and upbringing.*

Contact & Location

Our offices are located in the heart of the Rockefeller Center District of Midtown Manhattan. We're surrounded by a vast selection of amenities: world-renowned restaurants, shops and boutiques, hotels and cultural attractions. Arriving at the branch every day reminds us of the dynamic world we live in and how fortunate we are to call New York home.
We hope you will contact us and begin a conversation about defining and achieving your financial goals.

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