

Keebeck Wealth Management Adds Innovative Protective Investments to Growing Independent RIA Platform

Partners with Halo Investing to provide customized structured products to clients

Chicago, IL – 5/26/2021 - [Keebeck Wealth Management](#) (“Keebeck”), an independent wealth management firm with \$1.4 billion in assets under management, today announced that it has partnered with [Halo Investing](#) (“Halo”), the world's first and only independent, multi-issuer technology platform for protective investments, to enable the firm to provide customized structured products to its clients.

Keebeck’s growing team of investment professionals will use Halo to easily add structured notes, market-linked CDs, buffered ETFs, and annuities to their clients’ portfolios. Keebeck will also have an advanced suite of tools to analyze, customize, purchase, and maintain these holdings through Halo.

“Partnering with Halo is another example of our commitment to providing our teams and clients with best-in-class independent investment solutions,” said Bruce K. Lee, Founder and CEO of Keebeck Wealth Management. “Adding customized structured products to our platform provides us with more flexible investment options to preserve our clients’ assets and meet their financial objectives. Halo’s cost effective and transparent offerings give our team a competitive advantage in the market.”

Halo simplifies the process of adding customized structured products for advisors and investors. Halo will surpass \$10 billion in transaction volume in 2021 and has more than 6,500 advisors and 30 leading global banks on its platform.

“Bruce has built one of the most reputable, highly-recognized wealth management firms in the world, and we are thrilled to be Keebeck’s partner for protective investments,” said Jason Barsema, Co-Founder and President of Halo. “We pride ourselves on partnering with leading RIAs like Keebeck who believe in the power of protective investments and are aligned in our mission of leveraging advanced technology to improve financial outcomes for investors. It’s a privilege to work with Keebeck’s team and we look forward to helping them scale their successful wealth management platform.”

About Keebeck Wealth Management

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Keebeck Wealth Management is a registered independent advisory firm dedicated to working with corporate executives, private business owners, entrepreneurs, and their multi-generational families. Our comprehensive wealth management solutions and our highly personalized services have a singular focus: to help our clients to step forward. For more information, please visit: <http://www.keebeck.com>

Please note, the information provided in this press release is for informational purposes only and investors should determine for themselves whether a particular service or product is suitable for their investment needs. Please refer to the disclosure and offering documents for further information concerning specific products or services.

Keebeck Wealth Management (the “Firm”) is registered as an investment adviser with the Securities and Exchange Commission (the “SEC”). Registration of an investment adviser does not imply any specific level of skill or training and does not constitute an endorsement of the firm by the SEC. The Firm only transacts business in states in which it is properly registered or is excluded or exempted from registration. A copy of the Firm’s current written disclosure brochure filed with the SEC which discusses among other things, the Firm’s business practices, services and fees, is available through the SEC’s website at: www.adviserinfo.sec.gov.

About Halo Investing

Halo Investing is the first multi-issuer technology platform for protective investment solutions. Headquartered in Chicago, with offices in Zurich, Dubai, and Singapore, Halo was co-founded by Biju Kulathakal and Jason Barsema in 2015 with a mission to provide access to impactful investment opportunities previously unavailable to most investors. Through the Halo platform, advisors and investors can easily access structured notes, market-linked CDs, buffered ETFs, and annuities as well as a suite of tools to analyze, customize, execute, and manage the most suitable protective investment product for their portfolios. For more information, please visit: <http://www.haloinvesting.com>

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