Tristan M. Bolton

Senior Financial Advisor

About Me

With over 16 years of experience, I provide personalized financial planning and investment advice. Registered with FINRA (Financial Industry Regulatory Authority), I serve clients across 17 states. I hold Series 6, 7, 63, and 66 licenses, offering expertise in asset management and wealth planning to help clients achieve their financial goals.

Contact

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575 Madison Ave, NewYork, NY 10022, United States WorldWide Business Centres

Skills

- Wealth Management
- Finanacial Planning
- Client Relationships Management
- Regulatory Compliance
- Investment Strategy Development

Education

(1998 -2002)

UNIVERSITY OF MASSACHUSSETTS, AMHERST

Bachelor of Finance

(2002 -2004)

UNIVERSITY OF MASSACHUSSETTS, AMHERST

Master of Investment Fund Management

Experience

(2010 -2016)

BUSINESS DEVELOPMENT OFFICER

AssetMark, Inc.

- Successfully grew client assets under management through strategic business development and client acquisition initiatives.

(2016 - 2020)

VP, REGINAL ADVISORY CONSULTANT

LPL Financial LLC

- Managed regional advisory services, leading a team to provide personalized financial solutions for clients in the San Francisco region.

(2020 - present)

SENIOR FINANCIAL ADVISOR

12X Wealth Strategies, LLC

- Establish and cultivate long-term relationships with high-net-worth individuals, helping them achieve financial goals through tailored investment strategies.
- Analyze client portfolios and implement asset management strategies focused on growth, risk tolerance, and income generation.