Tristan J. Cooke

Senior Financial Advisor

About Me

With over 9 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

+1 (929) 447-7540

tristan.j.cooke@12xwealth .com

1330 6th Ave 23rd floor
New York, NY 10019, USA

Skills

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

Education

(1998 -2002)

SOUTHERN METHODIST UNIVERSITY - SCHOOL OF FINANCE

Bachelor of Finance

(2002 -2004)

SOUTHERN METHODIST UNIVERSITY - SCHOOL OF FINANCE

Master of Investment Fund Management

Experience

(2018 -2020)

BUSINESS DEVELOPMENT OFFICER

Dimentional Fund Advisors

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

(2020 - present)

VP, REGINAL ADVISORY CONSULTANT

LGT Capital Partners

- 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.