HOEY INVESTMENTS, INC.
INVESTING FOR THE LONG RUN

About Tim Thomas

Tim is an Independent Advisor Representative at Hoey Investments with over 25 years of experience in the investment industry. Prior to this position, he worked in a variety of roles including consultant to the Bank of New York's investment platforms, branch manager and Director of Service and Operations at Lockwood Financial, and as a specialist clerk on the New York Stock Exchange. In recent years, Tim has worked as a financial coach and consultant on financial strategy for small companies and nonprofits.

How Can Tim Help?

Are you satisfied with your financial life? Are you confident that you are on track to your ideal financial future? Financial planning can be daunting, but the benefits that result are priceless. Tim's goal is to understand his clients' lifelong goals in order to deliver a highly customized financial plan with a personalized level of service.

Focusing on each person's financial needs and goals, Tim provides comprehensive services, including wealth management and financial planning. He especially loves to empower his clients with knowledge and objective information to make informed decisions. For Tim, there's no greater satisfaction than when he can help his clients alleviate the stress and fear of having enough resources to accomplish their goals and achieve financial freedom.

In addition to the practicals of financial planning, Tim also offers financial and life coaching. He is passionate about personal mindfulness training and coaching in order to further improve the health and wealth of his clients.

Why Do Clients Work With Tim?

Tim believes clients choose to work with him because he is committed to transparency and taking the time to understand the individual needs of his clients, rather than telling them what they need. He specializes in helping people who feel that working with an advisor is too expensive or intimidating. He strives to be someone they can trust to guide them to their ideal financial future. He genuinely cares about his clients and acts as a reliable financial concierge, helping them solve any problem regarding their financial affairs, no matter how big or small. He puts his clients first and loves to help people make a difference with their money and stay focused on their passions in life.

How To Get Started

Helping people feel comfortable and confident working with an advisor is what drives Tim every day in his career. He enjoys meeting with individuals and families to learn about their goals and see if he can help. To schedule a complimentary consultation, contact Tim today at 610-420-3207 or email tthomas@hoeyinvestments.com.