



Building Bridges: Solomon Private Wealth's Unique Approach

Meet Bradley W. Small CEO/Founder



My children! Amazing Blessings of God!



Sailing Wisdom -Jeanneau 349

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Industry: Financial Services – Wealth and Investment Management

1 / Background and Journey

Brad's roots trace back to the North Shore of Boston, growing up in Beverly, MA. His journey to becoming the CEO/Founder of Solomon Private Wealth in 2020 was a rich tapestry of experiences. Graduating from Gordon College with a BA in Business, he embarked on a career path that encompassed both corporate and community roles.

His early days saw him balancing academics with a passion for sports, excelling in soccer, track, and ice hockey. It was his prowess in ice hockey that earned him a scholarship to Gordon College, where he not only showcased his athletic abilities but also honed his skills in business, accounting, and economics.

During his college years, Brad didn't just focus on studies and sports; he delved into community engagement, working for Beverly Main Streets/Downtown Inc. and the Beverly Times newspaper. These experiences not only helped him pay for college but also instilled in him a deep sense of community and service.

Post-graduation, Brad embarked on a professional journey that took him through various roles, starting as a Finance Manager at the North Shore Chamber of Commerce. Over eight years, he rose to become the Vice President of the organization, gaining invaluable insights

into business operations and management.

In 1996, Brad made a pivotal decision to transition into wealth and investment management, joining Merrill Lynch. His career trajectory subsequently led him through firms like Smith Barney and Wells Fargo Advisors, where he witnessed firsthand the dynamics of the financial industry.

2 / Unique Business Approach

What distinguishes Solomon Private Wealth is its commitment to personalized, long-term relationships amidst a landscape dominated by transactional interactions. Brad's vision for the firm revolves around bridging the gap between technology-driven finance and traditional values of integrity, care, and wisdom.

In an era where big corporations prioritize size and transactions, Solomon Private Wealth stands out for its focus on client-centric solutions. Brad's firm prioritizes the human touch, leveraging technology to enhance rather than replace the personalized service they offer. The essence of their approach is encapsulated in their motto, "Wisdom to Wealth," symbolizing the journey from prudent decision-making to financial success.

3 / Pride and Purpose

Central to Brad's ethos is his unwavering faith, which serves as a guiding light in both personal and professional



Brad and Matteo



Friends Andrea and Veronica Bocelli, and their son Matteo (not shown), are on tour in Boston. Brad visits their homes in Lajatico and Forte dei Marmi, Tuscany Italy.



Giving Back- Solomon Fund recipients of donations raised in Cars for Charity show. Brad with Chris Nazareth of Beverly Bootstraps.

realms. He believes in integrating principles of honesty, integrity, and compassion into every aspect of his business. Brad's faith-driven perspective not only shapes his decision-making but also fuels his passion for making a positive impact on the community.

Brad finds fulfillment in witnessing his clients achieve financial peace and security, knowing that his guidance has played a role in their journey.

Beyond the confines of his office, Brad actively engages in philanthropy, supporting causes close to his heart and spearheading initiatives like the Solomon Fund, which hosts charity events for local organizations.

4 / Success Mantra

Success, for Brad, transcends mere financial achievements. It encompasses personal growth, resilience, and the ability to make a difference in the lives of others. Despite facing numerous challenges along the way, Brad's journey is a testament to perseverance and determination.

His philosophy revolves around continuous improvement, not just for himself but for the world around him. Brad believes in leaving a legacy of positivity and kindness, striving to make every day count by being 1% better and making the world 1% better. "Run the race to win the prize as is said in 1 Corinthians 9: 24-27."

5 / Advice to the Community

Drawing on his extensive experience in wealth and investment management, Brad offers valuable insights to the community. While technology has its merits, he cautions against solely relying on it for financial planning, emphasizing the importance of human expertise and personalized guidance.

In a world plagued by ethical lapses and short-term thinking, Brad advocates for a return to core values of integrity, trust, and long-term relationships. He believes that true success lies in fostering meaningful connections and planning for the future with prudence and foresight.



Enjoying car shows with my sons Bradley and Connor in 2022.



Nominating Mary Speta, Exec Director of Amirah for the Diamond Awards at the North Shore Chamber of Commerce 2023.

6 / Diverse Interests

Outside of his professional endeavors, Brad leads a rich and diverse life filled with various interests and hobbies. Sailing, collecting Italian cars, and engaging in outdoor activities like golfing, skiing, and hiking are just a few of the passions that bring him joy and fulfillment.

These activities not only provide Brad with moments of respite but also serve as avenues for connecting with his family and community. Whether it's sailing along the coast or participating in charity car shows, Brad's commitment to living life to the fullest shines through in everything he does.

7 / Inspirations

Brad's journey into wealth and investment planning was inspired by a desire to empower others and make a positive impact. Witnessing his parents' financial struggles fueled his determination to help individuals navigate the complexities of finance and secure their futures.

His commitment to service and community engagement stems from a deep-seated belief in the importance of giving back. Brad's story serves as a beacon of hope and inspiration, reminding us that success is not just about personal achievements but about making a difference in the lives of others.

Throughout his career, Brad's connection to the communities of Beverly, MA, and the broader North Shore region has remained steadfast. From his early days working for Beverly Main Streets/Downtown Inc. to his current role as CEO/Founder of Solomon Private Wealth, Brad's journey has been intertwined with the fabric of these communities.