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Beverly Wendt, CFP®

Financial Planner

Beverly A. Wendt Financial Planning & Wealth Management

Beverly Wendt has been in the financial services for 24 years. She focuses on providing solutions in the field of financial services to individuals, families and businesses. It begins with a dedication to her clients – to listen, to advise, to build a relationship – and is an ongoing process. Beverly works with a team of professionals with different areas of expertise assisting her clients to realize their financial goals.

In 1991, Beverly obtained the CERTIFIED FINANCIAL PLANNER™ certification. The CFP® certification enables Beverly to address the diverse needs of her clients and develop a customized wealth strategy for them. Her areas of experience are Financial Planning Strategies, Long-Term Care Planning Strategies, Products for Retirement Funding, Wealth Management Strategies and Estate Conservation Strategies.

Beverly has been the recipient of several awards including Gold Level Awards, President's Quality Awards, Honor Club and President's Conference within John Hancock Financial Network. She has also been recognized at MDRT's Court of the Table.

Currently, Beverly is a member of the Financial Planning Association of Long Island, NAIFA and a Lifetime Member MDRT. She has also been a Kiwanis member for six years where she served as President of Local Chapter and on the Board of Directors.

Beverly has two children and resides on Long Island.

- Wealth Management
- Insurance Protection
- Financial Planning
- Estate Planning Strategy
- Retirement Planning
- Compensation Design
- Business Planning
- Business Succession Strategies

*"Lighting the Way
to a Secure
Financial Future"*