

NO MAHOGANY DESKS HERE,
JUST PEACE OF MIND



The Live Oak Private Wealth team is focused on changing what a wealth management firm typically looks like and maximizing the impact of their clients' financial strategies.



LIVE OAK®
PRIVATE WEALTH



Andy Basinger, CFP® | Managing Director
Specialty: Comprehensive financial planning



Bill Coleman | Managing Director
Specialty: Investment portfolio strategies



Connor Keller | Managing Director
Specialty: Trading options & portfolio strategies



Daniel Hughes | Senior Fiduciary Advisor
Specialty: Trust and estate planning

THEY'VE SEEN IT ALL—
BULL, BEAR, BUBBLES AND
BOONS. OUR ADVISORS
HAVE BEEN THROUGH
THEIR FAIR SHARE OF
MARKET CYCLES. LET
THEIR EXPERTISE BE YOUR
GUIDE THROUGH ALL OF
LIFE'S UPS AND DOWNS SO
YOUR MONEY IS THERE
WHEN YOU NEED IT.

Live Oak Private Wealth provides the experienced guidance your family needs to feel financially secure and have peace of mind.

We know that it's easy to get confused and distracted by media noise, which makes you feel unsure of your investments. At Live Oak Private Wealth, we're focused on listening to our clients and helping them stay on the right path to meet their financial goals.

Learn more at liveoakprivatewealth.com

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