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[Wall Street Women Need To Know Jane Newton]

RegentAtlantic Capital, LLC

Wall Street Women Need To Know Jane Newton

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"I was just offered the job of my dreams, but can I even take it?"

This was the call Jane Newton — a Wealth Manager and Partner at RegentAtlantic Capital — received from one of her female Wall Street clients. Newton and the client agreed to meet the next day to evaluate the opportunity.

This is one of the many conversations Newton has had with her Wall Street clients in recent years. The radically changed landscape of Wall Street is forcing high-level women throughout the industry to re-assess and often adapt their career and personal aspirations. Newton not only understands this reality, but is well positioned to advise clients on their personal finances in the context of their professional and personal goals. She has built a practice specialty advising experienced women on Wall Street by drawing on her 23-year career in financial services. She explains, "I started my career on Wall Street with 17 years at JP Morgan in investment banking and then private banking. I draw on my deep understanding of the industry to advise my clients on the Street." Named a Five Star Wealth Manager for 2011 and 2012 by *New Jersey Magazine*, Newton's market certainly suits her passion for this industry.

RegentAtlantic — identified as one of the largest independent, fee-only registered investment advisors in the country by *Investment News 2010* — provides Newton the ideal environment for her practice specialty. Many of the firm's wealth managers focus on delivering their financial planning and investment management expertise to a niche market. With specialties including physicians, attorneys, pharmaceutical executives, business owners, or women going through divorce, RegentAtlantic's advisors use their talents to provide objective services that are in the best interest of their clients. The firm is recognized nationwide, named by Forbes as one of the top 50 Fee-only Wealth Management firms in the country in 2010.

Newton's Wall Street women specialty hasn't evolved without raising a few eyebrows. One might ask: why do these capable, intelligent women need another party to manage their finances? Newton explains, "Wall Street women are busy cultivating their careers and personal lives. They wake up at 40 or 50 years old and realize they've accumulated a great deal of assets, spread across various accounts with no overall coordinated plan. Attending to their finances continues to fall to the bottom of their to-do list." It is this "Ah-ha" moment that has these busy professionals seeking out Newton's advice. "The women who become my clients outsource so many facets of their life: Nannies, landscapers and accountants. They recognize that outsourcing their personal finances is the smart thing to do."

A Wall Street woman herself, Newton grasps her clients' mindset and the challenging environment in which they thrive. Furthermore, her independence and objectivity set her apart from other advisors. Who can these executives turn to for trusted advice? Newton's experience is that it is unlikely to be their internal broker. She asks, "Would they go to that person to ask about exercising their stock options? For advice about changing jobs or leaving the firm? For recommendations to minimize their estate taxes?"

In contrast, Newton and her team offer a space where these women can be candid about their goals and a service that goes beyond investment management. "Of course we have to be good at managing their assets, but our real value added is in putting together the pieces of our client's financial puzzle," Newton says.

Looking back to the client phone call mentioned previously, Newton applied this integrated approach in advising her client in their meeting. Not only did Newton quantify the value of what the client would potentially gain as well as leave on the table should she accept the new job offer, she analyzed the financial impact in the context of the client's longer term goals. Above all, their conversation helped the client prioritize what was most important to her about the new position, beyond the compensation package, namely the opportunity to lead a more visible department and have a seat on the executive committee.

It is only natural that clients turn to Newton when faced with significant career decisions, because of the impact these turning points have on their financial goals. Consider the radical compensation changes now impacting Wall Street. As if the issue of job security wasn't looming over their heads already, industry executives are facing dramatic cuts in the cash they take home, finding everyone on the Street contemplating their plans for the future. In a survey conducted by Newton last year, 83% of high-level Wall Street women polled said they expected to be paid either the same or more over the next two years. That majority is now adjusting last year's expectations to today's harsher reality.

Newton helps her clients cope with their anxieties around this. "My services boil down to three key things," she says. "First, I build a plan to help clients make sound financial decisions, updating it as their circumstances change. Second, I provide

Newton with her team: Greg Allison, Kathleen Rabiecki, Ann Rainer and Bryan Smalley (Lesley Draper, not pictured)

recommendations designed to grow assets, shrink taxes and manage risks. Lastly, I proactively manage their portfolios and present additional investment and planning strategies worth their consideration. All while operating within any compliance restrictions imposed by their employer."

In an effort to stay abreast of the issues facing her clients, Newton has interviewed over 200 high-level Wall Street women and the professionals they work with. She has her fingertips on the pulse of the industry and draws from her network of outside experts — employment and estate planning attorneys, recruiters, coaches and accountants — to further her clients' opportunities for success.

That same initiative drove Newton to launch the Wall Street Women Forum® in 2010, an invitation-only event for 100 of the most experienced women on the Street. The seed for the Forum was planted following the financial meltdown of 2008. Newton recognized that her female clients on the street were raising the same serious issues as her colleagues in financial services. Among the women, especially, she discovered a thirst for information and for gathering with their peers across the industry. Everyone wanted to know what the "New" Wall Street was going to look like, and how to best reinvent themselves to propel their careers forward. This April 18th marks the Forum's third year of bringing together 100 senior-level Wall Street women for high quality, actionable content to support their continued professional success. This year's Forum title, "Headwinds and Tailwinds on Wall Street: Excelling in Turbulent Times," cuts to the core of the current climate on the street. Keynotes Mellody Hobson of Ariel Investments and President Debora Spar of Barnard College will undoubtedly address an audience concerned about the recent cuts to their bonuses and the future of their careers.

While Newton's Forum shines as the culmination of her experiences with the women of Wall Street, her priority lies with those she counsels daily. "The Forum is an integral part of my efforts to help the women excel in their careers, though the rewards of my work go beyond that," Newton explains. "My key focus will always be on the best interest of my clients and striving to help their goals become actualized or surpassed as a result of my services."

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Contact Jane Newton for a complimentary Second Opinion of your portfolio

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