James P. Beckett, CFP®, CIMA®

Senior Investment Strategist
Mid-Atlantic Region

James Beckett is a Senior Vice President and Senior Investment Strategist for the Mid-Atlantic region of Wells Fargo Private Bank. As part of investment management, Mr. Beckett works with clients to provide consultative investment services, customized asset allocation strategies and tailored investment portfolios to meet their investment objectives.

Mr. Beckett has worked as an investment professional since 1991. Prior to joining Wells Fargo, Mr. Beckett was a founding member and Vice President at Lenox Wealth Management, an independent Registered Investment Advisor catering to the investment and financial planning needs of clients in Cincinnati, Ohio. He has also served as an investment professional with UBS Financial Services and Merrill Lynch.

Mr. Beckett earned his Bachelor of Arts degree in Economics from Miami University. He was awarded a Certified Investment Management Analyst designation in 1997 and a Certified Financial Planner designation in 2000.

Mr. Beckett lives in Roanoke, Virginia and is married with three children. He is a member of the Roanoke Valley Estate Planning Council and a Board Member of Mill Mountain Theatre.