TD Wealth

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Head of Investment Management,
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Private Client Group

James Beam is the Head of Investment Management, Brokerage, Planning, Retirement, Strategy and Trust for U.S. Wealth. In this role he is President of TD Private Client Wealth, LLC (a Registered Investment Advisor and broker dealer subsidiary of TD Bank, AMCB) and has oversight responsibilities for setting investment strategy and the holistic advice deliverables for US Wealth. Jim has over 20 years of investment and wealth management industry experience.

Jim resides in Haddonfield, NJ and is a graduate of Rowan University where he earned a Bachelor of Science degree with a specialization in Finance, a Master of Science degree in Financial Planning from the University of Nebraska – Lincoln and has an MBA from the University of Michigan Ross School of Business.

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