FOUNDATIONS
FINANCIAL PARTNERS

Thomas R. Beeby II

FINANCIAL ADVISOR

THOMAS R. BEEBY II

(p) 215.230.8640
(f) 215.230.8643

tbeeby@foundationsfinancial.com

601 New Britain Road Suite 525
Doylestown, PA 18901

www.foundationsfinancial.com

"Anything worth doing, is worth overdoing." – Shane Patton

As a Financial Advisor with Foundations Financial Partners, LLC, Tommy takes pride in building deep, meaningful relationships with his clients. He strives to be a trusted partner throughout their financial journey rather than simply providing transactional advice. Tommy approaches every client engagement with a planning-first mindset, helping individuals and families define their goals and develop clear strategies to achieve them.

Driven by a passion for innovation, Tommy has embraced technology as a core component of his practice. His deep appreciation for emerging technologies has led him to integrate artificial intelligence into the financial planning process. By leveraging AI to navigate financial complexity, enhance analysis, and improve efficiency, Tommy aims to enhance precision and support informed decision-making as clients pursue their financial goals.

Tommy specializes in working with medical professionals, helping them navigate the unique financial challenges associated with their careers. He assists physicians and healthcare providers in managing fluctuating income and debt, evaluating practice buy-in and buy-out opportunities, and protecting their most valuable asset; their future earning potential. He also works closely with young professionals and couples, helping them establish a strong financial foundation and create a roadmap for long-term wealth accumulation and financial independence.

Tommy graduated from the University of Delaware in May 2022 with a Bachelor of Science in Finance and a minor in Economics. He continued his education at Delaware, earning a Master's Degree in International Business from the Alfred Lerner College of Business & Economics in May 2023.

During his time at the University of Delaware, Tommy was a member of the Division I men's lacrosse team, where he earned multiple Colonial Athletic Association (CAA) All-Academic honors and played a key role in two CAA Championship teams. While completing his graduate studies, he also served on the program's coaching staff as Head of Alumni Relations and Player Career Development. Tommy remains actively involved with the University today through the Men's Lacrosse Alumni Association, helping foster professional and personal connections among current and former members of the program.

Prior to joining Foundations Financial Partners, Tommy worked as an Analyst at a wealth management firm in Manhattan. In that role, he supported two advisors and helped serve more than 60 high-net-worth (HNW) and ultra-high-net-worth (UHNW) clients. His responsibilities included developing customized financial plans, designing personalized portfolio allocations across multiple asset classes, and preparing comprehensive client presentations covering investment performance, tax strategies, and estate planning considerations. This experience provided Tommy with a broad and well-rounded foundation across the wealth management landscape.

"I have a passion for helping our clients pursue what matters most to them. A comprehensive, connection-driven wealth management strategy begins with deeply understanding each client's values, personal connections and financial objectives. This is my "north star" in how I treat each client relationship."

Tommy is from Westchester, NY and currently lives in Conshohocken, PA. He volunteers for the C4 Foundation, an organization created to provide resources and support to active-duty Navy SEALs and their families. He enjoys nothing more than spending time with his family and friends, whether at the beach, golfing, or cheering on his New York sports teams.

Financial Security, Built to last