



Michael Bean, CFA, CPA, CFP®

Advisor

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Michael Bean is an Investment Advisor with RubinBrown Advisors and a Partner with RubinBrown LLP. He manages the investment portfolios of high-net-worth individuals and provides comprehensive financial planning services. Michael's comprehensive approach covers wealth management issues in the areas of tax, estate planning, investment management, corporate stock option planning, insurance and charitable planning. Michael works closely with his clients to understand their individual needs and provide a plan to achieve their goals.

Michael also has extensive experience in mergers and acquisitions having worked in RubinBrown's Business Advisory Services Group earlier in his career and the acquisitions department of a Fortune 1000 company.

Specific Experience/Expertise

- Portfolio management
- Tax planning for individuals
- Retirement planning
- Mergers and acquisitions
- Public & private business valuations

Education

- Masters in Accountancy, University of Missouri, Kansas City
- B.S., Finance, University of Nebraska

Professional Organizations

- Member, CFA Society of Kansas City
- Member, CFA Institute
- Member, Missouri Society of Certified Public Accountants
- Greater Kansas City Chamber of Commerce Centurions Leadership Program, Class of 2020
- Member, Financial Planning Association of Greater Kansas City