RANDY ALLISON KAUFMAN

Randy Kaufman, formerly a corporate tax attorney and investment banker, is now a wealth advisor who prides herself on focusing on what matters most: clients' peace of mind, family dynamics, and getting enough, not more. Randy is a passionate student of impact investing, strategic philanthropy, and behavioral psychology (while not a psychologist, she occasionally plays one on TV). She is dedicated to helping the underprivileged and is a proud member of Acumen's advisory board. A thinker, learner, and pursuer of overarching truths, she is always eager to discuss big ideas about money, and its off-and-on associate, happiness.

Currently, Randy is the founder and managing partner of Aker Advisors, LLC. Prior to Aker Advisors, Randy was a Senior Vice President at EMM Wealth and a Partner at Cerity Partners. Her expertise includes estate and income tax planning, pre-deal planning, multi-generational issues, impact investing, and philanthropy.

Previously, Randy worked at various wealth management firms, including a multi-family office that she co-founded in 2002. Before becoming a wealth adviser in 1998, Randy held various investment banking and tax structuring positions at J.P. Morgan and practiced corporate tax law at Paul, Weiss, Rifkind, Wharton & Garrison.

Randy has been a featured speaker over the years on numerous topics, including behavioral finance and philanthropy, the integration of business and personal issues, and estate planning strategies. Her blog Grit with Grace: www.Randykaufman.com covers a vast array of topics ranging from Mind Games, Family Matters, Giving Smart and False Gods. Please take a look!

Heavily involved in her community, Randy is the Past President of the New York City Estate Planning Council, and a former senior adviser to the Wealth and Giving Forum. She has also served on the Indego Africa Advisory Board, the Naomi-Berrie Diabetes Center Advisory Board, and on the board of governors for Opportunity International. She is also a former member of the Jewish National Fund's Sapphire Society. Randy currently serves on the Advisory Board for Acumen.org, doing volunteer work on major projects such as attracting major donors and creating a legacy giving plan.

Randy is a 21/64 Certified Advisor, having received specialized training in how to engage the next generation of philanthropists. She was also a trainer for Redwoods Initiative, a non-profit that provides next gen financial literacy educational programs.

She received her bachelor's degree from Middlebury College and her Juris Doctor degree from the University of Chicago.

When Randy is not working with clients, you can often find her and her precious dogs and husband in motion on the land and the sea, skiing, hiking, cycling and sailing.