



Rebecca Beckett, CFP®

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“I am passionate about helping to instill investment confidence and offering tailored guidance to my clients.”

Rebecca Beckett is passionate about financial advisory services. She began her career with The Keyes Company as a realtor and mortgage broker, specializing in oceanfront condos and second homes. However, when 2006 brought the end of the real estate bubble, Rebecca decided to pivot career paths and joined David Lerner & Associates.

At David Lerner & Associates, Rebecca leveraged her experience in real estate, and embraced her new role as an Investment Counselor. As she quickly expanded her role and expertise, she earned her Series 7, 63, 65, and Health & Life, including Annuities & Variable Contracts (insurance) licenses.

Rebecca later repositioned her career and spent almost six years with Oppenheimer as she grew her business and established a special focus on women investment clients. In January 2020, Rebecca joined HJ Sims as a Financial Advisor in our Jupiter, Florida office.

During her time with HJ Sims, Rebecca accomplished her goal of earning the [Certified Financial Planner™](#) certification. The CFP® certification is a mark of excellence Rebecca is proud to have earned. It supports her commitment to taking a holistic, personalized approach to bring all the pieces of her clients' financial lives together.

Rebecca has an impressive educational background, which includes Associate of Arts and Sciences degree in History, a Bachelor of Science in Economics at St. Mary's College of Maryland and attendance at Florida Atlantic University's College of Business.

Rebecca hails from New Jersey, and now lives with her five children in Stuart, Florida. Rebecca is an eager participant and supporter of her children's activities. She supports the Boys & Girls Club of Martin County, and is a member of the Hobe Sound as well as Palm City Chambers of Commerce. Rebecca is an avid sailor, member of her local sailing center and serves as a sailing instructor.

Having a background as an ocean lifeguard, Rebecca regularly participates in open water swims. Rebecca relishes living near the ocean, which makes her love of sailing and swimming all the more possible to enjoy. Rebecca also enjoys mountain biking, hiking and camping with her sons.

Other passions of Rebecca's are history, particularly World War II. She has a huge heart for Holocaust survivors and family members, and an affinity for the elderly of that time period. Rebecca has a strong connection with seniors 65+, respecting their longevity and vulnerability.

As a single mother of five, Rebecca understands that, as a woman, obtaining investment confidence is paramount. She often observes the parallels between her role as Financial Advisor and her own life, along with the admiration she has for the single mothers, seniors and women-owned businesses she serves.