



## **Chris Hely**

Corporate Headquarters:  
244 W. Water Street  
Elmira, New York 14901  
Office: 914-961-1260  
Cell: 914-661-6300  
Email: [chely@bkafinancial.com](mailto:chely@bkafinancial.com)

Chris Hely is an expert in the design and implementation of complex estate planning and insurance strategies, including multi-generational planning, business succession and charitable planning. With over 20 years of experience, Chris works with Financial Advisors identifying, designing, and implementing wealth management solutions for their high net-worth clients. During the last fourteen years, Chris has focused his efforts on providing insightful planning recommendations for the clients and senior executives of national broker-dealer firms. Chris previously worked at Morgan Stanley Smith Barney (MSSB) where he ran the New York City region by assisting MSSB Advisors with estate planning strategies for their clients. Prior to that, Chris was at Brown Bridgman, an NFP Company, where he advised the firm's existing clientele and post-IPO Goldman Sachs managing directors. He also advised Merrill Lynch's private banking and retail clients during a joint venture with Merrill Lynch.

Chris enjoys staying active and loves sports. He served on Varsity Crew and was 1991 National Champion at the University of Pennsylvania and participated in the Olympic trials, 1992.

### **EDUCATION**

- The Wharton School of Business, University of Pennsylvania  
Bachelor of Science.
- College of Arts and Sciences, University of Pennsylvania  
Bachelor of Arts in History.