Derek Eckert

Melding passion for environmental issues with career as wealth management advisor

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Derek has been in financial services for nearly 25 years. Continual education and mastery of the trade are hallmarks of his commitment to his clients, constantly striving to learn how to further enhance the financial position of his clients. A lifelong love of the outdoors and the environment along with the realization that the best way to serve his clients was by being a registered independent advisor led him to creating Syntropy Wealth Management in 2018.

EXPERIENCE

Syntropy Wealth Management May 2018-present
Founder & Managing Directory
A fee only independent registered investment advisory offering comprehensive wealth planning through ESG (environmental, social and governance) investments. Holistic planning starts with full understanding of each client's financial situation, suggestions and advice is offered for tax, estate, insurance, charitable planning, education and retirement however, as a fee only advisory, compensation is only earned by charging management fees for accounts which are managed. Serving individuals, HNW families and institutions.

TIAA May 2007-April 2018
Wealth Management Advisor
Worked with over 800 high net worth individuals and managing a book of over $1 billion providing planning, sales and service.

JP Morgan Chase July 2005-April 2007
Vice President
Provided financial planning and services for high net worth clients

Charles Schwab & Co., Inc. August 1998-June 2005
Financial Advisor
Provided financial planning and services for retail clients

EDUCATION

University of Texas at Austin May 2004

M.S. – Science & Technology Commercialization

University of Cincinnati April 1995

B.S. – Ecology & Environmental Sciences

ACTIVITIES

Sierra Club, Lone Star Chapter, Executive Committee member

Austin 350.org, Divestment Committee member