A Passion for Planning

Distinctive Wealth Strategies' Regina Beatty helps clients draw just the right roadmap.

"Most of my clients have achieved very high levels of success and have worked hard to build financial security for themselves and their families. Often their business is their largest asset. It is my passion to help take them through a complete business succession process that reflects their vision, values, and goals and create a distinctive succession strategy designed to help them prepare for success, even after they exit their business."

-Regina Beatty

"I am the poster child for why people need financial planning," says Regina Beatty, Private Wealth Strategist for Mosaic Wealth Consulting in Greensburg, Pennsylvania.

Years ago, as a divorced mom of two sons, Beatty met and married her second husband, a widower who also had two boys. The families were blended, and together, the couple built a successful life insurance business. But one night, while driving to a restaurant for dinner, her husband suffered a heart attack and died, leaving Beatty with four sons to raise and educate.

"Thank God for life insurance," says Beatty, recalling that challenging time. "I wasn't wealthy, but I knew that if somehow I couldn't work, I had enough to pay off the house and get everyone through college."

Life has a way of teaching you what you need to know. Beatty quickly took stock and made some changes. She started working as a financial planner at Lincoln Financial Advisors but soon realized there was much she didn't know. She went back to school, earned a bachelor's degree, and earned the CERTIFIED FINANCIAL PLANNER™ designation.

Beatty's business exploded. Her personal experience as a female business owner, a stepparent, and someone who had survived and thrived despite a terrible loss resonated with clients seeking financial wisdom and motivation. Today, she is one of Lincoln Financial's leading advisors, bringing "Distinctive Wealth Strategies" for each family she works with. She specializes in planning for successful business owners and their families in all facets of business succession planning and coordinated estate and legacy planning. With enthusiasm, dedication, and deep knowledge, she guides her clients along a financial roadmap tailored to their unique needs.

Beatty's many successes on behalf of her clients have brought her recognition by Women in Insurance & Financial Services and Five Star Wealth Manager. But accolades don't mean as much to Beatty as the relationships she develops with her clients—relationships based on trust.

"My clients are seeking advice that's not intertwined with a product I'm trying to sell them," says Beatty. "My job is to work through a process to follow the math and then tie their emotions to the math to appropriate strategies that will help them reach their financial goals. This process allows me to lay out options and lets the clients choose what resonates with them." During times of market volatility, she often picks up the phone and calls clients to answer questions and assuage any worry.

Outside the office, Beatty is committed to giving back to her community. She serves on several boards of directors, raises scholarship funds for area children, and serves as a mentor to girls and young women who are considering a career in financial management.

"Women are innately good at this," says Beatty. "We multitask, we're organized, we're fearless, and we'll do anything to take care of our families. Well, that's financial planning! It's been a crazy ride, but I love what I do."

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