

# Curtis L. Lyman, J.D.

## CEO/CIO

ROLE: Portfolio Management and Retirement Planning

“The driving force behind the creation of this firm is my belief that our clients are entitled to sophisticated and independent advice, free from conflicts of interest.”

Mr. Lyman is the CEO/CIO of Alpha Beta Gamma Wealth Management, a firm registered with the SEC, pursuant to the Investment Advisors Act of 1940. Mr. Lyman has been helping retirees and pre-retirees plan their “second life” for over 30 years. “Our Mission is Creating Financial Strategies to Protect Your Future. Our job is to help clients actualize their dreams.”

A graduate of Hiram College with honors, Mr. Lyman earned his Juris Doctor from Case Western Reserve University School of Law and was a partner in the New York law firm of Lyman & Lyman. Concurrently, Mr. Lyman also served as a District Attorney. Mr. Lyman was the founding President and CEO of the Raymond James Trust Company, President of the STI Private Capital Group, N.A. and President and CEO of Wilmington Trust FSB’s Florida operations. He served as an officer at Merrill Lynch and Lehman Brothers. Mr. Lyman was one of the earliest Partners of HighTower Advisors, LLC. Mr. Lyman holds a series 65 license and is licensed as an agent for Life, Health, Annuities and Long Term Care Insurance. Mr. Lyman is licensed as an attorney to practice law before the Courts of the State of New York and before the U.S. Federal Courts and the U.S. Courts of Appeal.

Mr. Lyman is an active member of the Palm Beach community where he has served on the boards of educational and philanthropic organizations. He resides in Palm Beach County with his wife and business partner, Joanne Robin.

Curt is an active pilot who often flies to visit clients. He is a member of the Experimental Aircraft Association, the Aircraft Owners and Pilots Association and is a Command Pilot for Aerobridge and Angel Flight-Southeast.

Alpha Beta Gamma Wealth Management is a Registered Investment Advisor. Insurance and annuity products are offered through Alpha Beta Gamma Risk Management, PLLC, a licensed Insurance Agency.



**ALPHA  
BETA GAMMA**  
WEALTH MANAGEMENT

TEL (561) 227-5099 | FAX (561) 207-6377  
EMAIL [clyman@abgwealth.com](mailto:clyman@abgwealth.com)  
3801 PGA Boulevard, Suite 600  
Palm Beach Gardens, FL 33410