

Danbury investment consultant wins national recognition

By Robert Gold
the news-times

DANBURY -- A local investment consultant will be honored by a national trade magazine next week. Carl Bailey, co-owner of Danbury-based Bailey & Beatty Financial Services, was named an "Outstanding Advisor" by Registered Rep. magazine, a monthly publication for investment professionals. Only 10 people nationwide received the award from the 125,000-circulation magazine.

"He was a pretty easy choice to make," said David Geraciotti, editor of Registered Rep., adding that more than 100 professionals were considered for the award.

Geraciotti said the annual award selects people who balance performing well financially with contributing to their communities.

"We are trying to find advisers who are at the top of their profession, yes, but also people that do a lot for their charities," he said.

Bailey, 53, will receive the award May 10 at the NASDAQ site at Times Square in New York City.

Bailey has been an investment consultant for 28 years and ran his own firm for 25 years. In December, his business partner Paul Beatty became co-owner. Bailey & Beatty Financial Services handles more than \$250 million in assets.

"It is humbling to be recognized by your peers," Bailey said.

Bailey said ethics has been key to his business. "To take the greed factor out of the brokerage profession is critical," he said.

Bailey shows his compassion beyond the office. He is president of Danbury Grassroots Tennis, a program started last year that gives free tennis lessons to children living in public housing.

He is secretary of the board of directors for the United Way of Northern Fairfield County. He helped finance several projects in Managua, Nicaragua, including a computer lab, library and soccer field.

Bailey's history helps explain his work in Guatemala, he said. His father immigrated to the United States from Lebanon as a boy.

"I was always aware I could easily have been born in Beirut," he said. "It gave me a huge empathy for those unlucky to be born in other countries."

Geneva Courtright, a Florida client of Bailey's, said he goes "above and beyond" his job. Geneva's husband, Bob Courtright, signed up with Bailey several years ago in Ridgefield.

"He is a personable individual that takes more interest than (just) interest in somebody's money," she said.

Geraciotti said Bailey was recommended by his broker dealer, Commonwealth Financial Network.

"He's pretty unbelievable," he said.



Carl Bailey, co-owner of Danbury-based Bailey & Beatty Financial services, is one of 10 people nationwide named an "Outstanding Advisor" by a trade publication.