MOVER AND SHAKER

Christopher Street Financial's JEN HATCH

This seasoned financial advisor invests in her clients and the futures of LGBT youth

BY WINNIE MCCROY

Without the benefits of marriage and the plethora of instant rights it bestows, lesbian couples need to construct a foundation of legal paperwork to ensure that their families and homes won't be snatched away when trouble arises.

Lucky for us, then, that Christopher Street Financial Managing Partner and co-owner Jen Hatch is playing for our team.

"We are helping people make their dreams come true," said Hatch, without a trace of insincerity. "Vision is very important in financial planning. Investing is the foundation, but you really have to know your clients' needs and aspirations to make it work. That's the most exciting part for me, working with the clients."

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Christopher Street Financial is a nearly 25-year-old firm focusing on serving the financial planning needs of the gay community. Hatch says that of the firm's six advisors, four are lesbians, and together they manage 150 million pink dollars. The clients, 75 percent of whom are gay or lesbian, run the gamut from couples planning their lives together; those with new, inherited "sudden wealth" and those planning retirement accounts. Hatch and her team help them not only invest wisely, but make their dreams come true, be that creating a legacy or protecting their relationship.

"Without marriage, you face completely different legal, tax and estate issues, and what we do is about protecting you and making sure you're not spending too much in taxes, most of which would be solved if we had federal marriage," said Hatch. "It's critical for both couples and individuals to take care of their assets, so they have the future they dream about."

Hatch, who bought Christopher Street Financial seven years ago, gained her experience as a bond trader for Wall Street firms JP Morgan and Bear Stearns. Her passion for helping the community fit seamlessly into her work with Christopher Street Financial—but she hasn't stopped there.

When not busy helping clients plan their futures, she works to ensure younger gays and lesbians can realize their dreams. As a trustee for the Point Foundation, Hatch helps give scholarships and mentoring to gay and lesbian youth, many of whom have been kicked out of their homes for revealing their sexual orientation, or denied educational support despite their academic achievements. A high-profile example is the recent case of Maya Keyes, the lesbian daughter of conservative pundit Alan Keyes who came out to her parents, and discovered they would no longer support her.

"We helped Maya Keyes find a place to live, and she is going to Brown next year," said Hatch. "That's exactly the horrifying situations these kids face; it is unbelievable that people still go through this today." The Point Foundation currently helps 25 kids realize their dreams; Hatch personally mentors one young man. "He spent the summer working for me and living in Nyack; we took him to Princeton to Parent's Day, and his report card is on our refrigerator," she said.

Hatch also helps people nearing the end of their lives plan their estates. "On the first Monday of every month I do a Legacy Building workshop at The Center, to help people become philanthropists, to tap into their desire to give back to the world, to create a legacy," said Hatch. "I really try to inspire them to give back to the community."

Hatch and her partner of 11 years, Susanne Smith, live in Nyack in a "big old Victorian house on the Hudson," which they are renovating. The two have made a business of buying old houses, renovating and reselling them. Smith, another Wall Street vet, works full time at this real estate venture.

With their financial planning backgrounds, you can be sure the couple's assets are well-protected. But don't listen for wedding bells; Hatch says they have no plans to be married.

"We feel a little self-conscious about a wedding, but we also feel like we've been married for 11 years, and to have a wedding would be to deny those years," said Hatch. "We both respect and celebrate what we've accomplished, but a wedding feels like a beginning, and we are well down that road."

Hatch admits that her number-one hobby, outside of playing tennis, is nesting with her partner and their two cats in their Nyack home. "I've accomplished a lot in my life," said Hatch, "but by far what's most important is my relationship. I feel very lucky." ■

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