

# BERNHARDT

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## WEALTH MANAGEMENT

A Registered Investment Advisory Firm

### Gordon J. Bernhardt

CPA, PFS, CFP<sup>®</sup>, AIF<sup>®</sup>

President and founder of Bernhardt Wealth Management, Gordon Bernhardt is focused on providing high-quality service and independent financial advice to his clients. He specializes in addressing the unique needs of successful professionals, entrepreneurs and retirees, as well as women in transition.

Gordon recognizes that while fulfilling work is important, the greatest rewards come from living a well-rounded life. For that reason, he strives to relieve his clients of their financial anxieties, so that they can pursue their dreams.

Having grown up in a Nebraska farming community, Gordon left the Midwest in the early 80s for his first job as assistant to a U.S. House Representative in Washington, D.C., followed by a position for the U.S. Senate Finance Committee. On entering the financial industry, Gordon worked for Price Waterhouse (now PricewaterhouseCoopers) and then spent three years in the corporate accounting world. Next, he worked for Acacia and American Express Financial Advisors (now Ameriprise) before starting his firm in 1994.

Gordon holds a degree in commerce from the University of Virginia. He is a Certified Public Accountant and Personal Financial Specialist. Committed to a higher fiduciary standard of excellence, he has earned the professional designations of CERTIFIED FINANCIAL PLANNER<sup>™</sup> professional and Accredited Investment Fiduciary<sup>®</sup>.

Outside of work, Gordon is a board member of BEST Kids Mentoring Program. He is a past board member of the Orphan Foundation of America and Crisis Link and is actively involved with Action in Community through Service.



#### Areas of Expertise

- Portfolio management
- Retirement and estate planning
- Planning for executives and business owners

#### Education/Certification

- B.S., University of Virginia, Commerce
- Certified Public Accountant (CPA)
- Personal Financial Specialist (PFS)
- CERTIFIED FINANCIAL PLANNER<sup>™</sup> professional
- Accredited Investment Fiduciary (AIF<sup>®</sup>)

#### Affiliations/Memberships

- Board Member, University of Virginia Chamber of Commerce
- National Association of Personal Financial Advisors
- Financial Planning Association
- Virginia Society of Certified Public Accountants
- American Institute of Certified Public Accountants
- Northern Virginia Estate Planning Council

#### Media Resource

- Book Author, *Profiles in Success: Inspiration from Executive Leaders in the Washington D.C. Area*
- MSN Money
- CNN Money
- *Kiplinger*
- *The New York Times*
- Executive Leaders Radio