

BERNHARDT

WEALTH MANAGEMENT

A Registered Investment Advisory Firm

NEWS

For Immediate Release

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Bernhardt Wealth Management Recognized by *Northern Virginia Magazine* *Bernhardt and Koehl Named to 2014 Top Financial Professionals List*

MCLEAN, Va., Sept. 10, 2014 – Gordon J. Bernhardt, CPA, PFS, CFP[®], AIF[®], President and CEO of [Bernhardt Wealth Management](http://www.bernhardtwealth.com), and Timothy S. Koehl, AAMS[®], CFP[®], the firm’s Director of Financial Planning, have both been named to *Northern Virginia Magazine’s* Top Financial Professionals List for 2014. The advisors were selected after being nominated by their industry peers.

“Having two advisors from our boutique firm identified among the area’s top financial professionals is a testament to the commitment of our entire team’s focus on long-term relationship with our clients; built on a foundation of ethics, service and trust” said Koehl.

According to Bernhardt, inclusion on this distinctive list is possible because of two things at Bernhardt Wealth Management: people and process.

“We have a great team of individuals putting our client’s concerns at the forefront of everything they do. Without dedicated staff, the firm wouldn’t have had the success we had during our 20 year history and wouldn’t have been able to help the clients we serve during difficult markets. And it is our collaborative Strategic Wealth Management Process that really sets us apart as we help our clients address their top financial concerns,” explains Bernhardt.

Bernhardt Wealth Management maintains a fiduciary responsibility which makes them bound by law to act in the best interests of the client—in all cases. This differs from the suitability standards that govern most industry professionals including stockbrokers and registered representatives (such as employees of banks, insurance companies, brokerage firms and mutual fund companies).

“The difference is that a suitable investment may be an option that works for a client, but it is not necessarily in their best interest. However, a true fiduciary is legally bound to always do what’s best for the client, putting their goals ahead of anything else and that’s a role I take very seriously,” said Koehl.

“Serving our clients is not just a job. It is an opportunity to help people achieve their dreams and leave their legacy,” said Bernhardt.

The complete list of Top Financial Professionals was published in the September 2014 issue of Northern Virginia Magazine. Selected advisors were first nominated by their peers from the financial services industry. Bernhardt Wealth Management was recently named to *Financial Advisor* magazine’s [RIA Ranking of 2014](#). This national survey, published in the July 2014 issue, ranks Registered Investment Advisors by total assets under management.

About Bernhardt Wealth Management

Bernhardt Wealth Management was established in 1994 by Gordon J. Bernhardt, CPA, PFS, CFP®, AIF®. The firm provides financial planning and wealth management services to affluent individuals and families, professional executives and business-owners throughout the Washington, D.C. area. The Bernhardt team is focused on providing high-quality service and independent financial advice to help clients make informed decisions about their money. To learn more, visit bernhardtwealth.com.

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