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NEWS
For Immediate Release

Tim S. Koehl, CFP®

Tim S. Koehl, CFP® Becomes Partner at Bernhardt Wealth Management

McLean, VA (January 21, 2015) – Financial services veteran Timothy S. Koehl, CFP® has become a partner at Bernhardt Wealth Management, a fee-only independent investment advisory firm located in McLean, Virginia. The ownership became official on December 30th of last year.

Koehl joined Bernhardt Wealth Management in 2010 and most recently served as director of financial planning where he was tasked with managing a large number of key client relationships while focusing on the overall operations of the firm. In his new role as partner, Koehl will be involved in all aspects of the business including development and execution of all strategic initiatives, new business and staffing. In addition, he will continue working with clients in all aspects of wealth management, including investment management, retirement planning, tax planning, college saving, estate planning and other complex financial issues.

"I consider this a great honor to become an owner in such a well-respected firm," said Koehl. "When the founder and CEO taps you on the shoulder and offers you a part of something they have spent two decades nurturing and developing, the feeling of pride and responsibility is enormous. For our clients, this event confirms that we are serious about ensuring we are meeting their needs for many more years to come. I have had the opportunity to come in contact with a number of firms throughout my career and there is no doubt we are doing business the right way by eliminating the conflicts of interest that are unfortunately so pervasive in our industry."

The new ownership arrangement also serves as a formalized contingency plan for the firm. "No one likes to think anything unexpected is going to happen to them, but as a fiduciary I have a responsibility to our clients to make sure this practice remains an ongoing business serving their best interests, even if something unforeseen should happen," explained Gordon Bernhardt, president and founder of the firm. "It's good planning for any small-business owner."

"Over the past five years, Tim has become an invaluable partner to me and is widely respected by our clients for his uniquely customized approach to helping them meet their financial objectives," said Bernhardt. "He has had an impressive career over nearly two decades as a strategic advisor, including time at Edward Jones and Charles Schwab before joining our team. With this experience and his proven ability to build long-term relationships with individuals and business executives, I am confident Tim will help us maintain our standing as one of Washington D.C.'s top wealth management firms."

Koehl literally grew up immersed in the business as he watched his father become a financial advisor shortly after the stock market crash of 1987. He was inspired by the positive impact his father had on his clients' lives. From him, he learned that by putting the client first and focusing on their goals and aspirations, he too could help people achieve their dreams with a disciplined approach to investing and personal finances. Koehl earned the professional designations of CERTIFIED FINANCIAL PLANNER™ professional and Accredited Asset Management Specialist℠. He also holds an Executive Certificate in Financial Planning from Georgetown University.

Bernhardt Wealth Management's advisory business has a demonstrated record of excellence and performance, recently being named among the country's Top Registered Investment Advisory Firms by *Financial Advisor* magazine's RIA Ranking of 2014. They were also recognized as Top Money Advisers 2014: Fee-Only Financial Planners by the *Washingtonian* and Top Financial Professionals 2014 by *Northern Virginia* magazine.

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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, families 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. For more information, visit bernhardtwealth.com.

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