KINLOCH CAPITAL

Securities | Real Estate | Private Equity | Wealth Management

JENNIFER BERDELL, CFP®, CDFA®

Founding Partner

Director of Wealth Management

EDUCATION

Indiana University of Pennsylvania

Business Administration

LICENSES & CERTIFICATIONS

Certified Financial Planner™

Certified Divorce Financial Analyst®

VA Insurance License

VA Real Estate Agent

Series 65, Registered Investment Advisor

MEET JENNIFER

Jennifer serves as Director of Financial Planning and Wealth Management at Kinloch Capital. A financial professional for over 25 years, she has served her clients most recently as a Certified Financial Planner™ for two decades and previously as a Trust Officer and Municipal Bond Analyst early in her career. Her experience allows Jennifer to bring a comprehensive approach when working with and guiding clients.

HER STORY

After experiencing a divorce herself, Jennifer realized her financial planning expertise could benefit other women. Having earned the CDFA® designation, Jennifer offers financial coaching to empower women who are going through a divorce or loss. She helps women take charge of their financial world and build a team around them that will offer long-term support and sometimes even friendships.

HER NICHE

The Suddenly Single

Some of life's most stressful and traumatic events happen when we least expect them and are least prepared. If you find yourself 'suddenly single' either through widowhood or divorce proceedings, know that Jennifer has the expertise in assisting you to navigate the financial implications of these events and planning for your future security.

"You probably don't have any idea how much your support, expertise, and kindness have meant to me. I remember the first time I spoke with you; I was so relieved after our conversation. Those were dark days, and connecting with you was huge for me, and has remained so."

- Martha, Former Suddenly Single Client, Current Kinloch Capital Client

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ABOUT KINLOCH CAPITAL

Kinloch Capital is a SEC-Registered Investment Advisor. As fiduciaries, we are legally-obligated to put your interests first. As an independent firm we have no corporate parent pushing 'financial products' on you or 'sales goals' on us. Kinloch Capital created a better approach to building & preserving wealth. We follow an Endowment Model of investing, and a Family Office Model of sophisticated wealth management. We bring 'billionaire strategies' to you, the 'millionaire next door.'

INVESTMENT MANAGEMENT

At Kinloch Capital we are money-managers, not middle-men. This is in stark contrast to many advisory firms that outsource the investment management process to mutual fund managers and/or money-management firms in far-flung locations. But it doesn't stop at stocks & bonds, we also help clients build portfolios of investment real estate and private equity.

FINANCIAL PLANNING

Your financial strategy is developed by a team of Certified Financial Planners™ with decades of real-world experience. Our holistic approach to wealth management helps you plan for the future and grow your financial portfolio through the Five Pillars of Wealth Management and Investment Management.

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"I enjoy being a 'financial coach' at a time when a woman has lost her confidence & is wrestling with sadness & anger to help enable them to move on in the best way possible...I'm there to help empower my Ladies, show them they are now in charge of their financial worlds and help them build a strong team around them."

- Jennifer Berdell, CFP®, CDFA®