



## Shawna L. Theriault, CPA, CFP®, CDFA® Managing Associate

Shawna L. Theriault, CPA, CFP®, CDFA®, is a Managing Associate at Henssler Financial. Ms. Theriault has more than 20 years of financial industry experience, including experience working exclusively with high net worth individuals on tax, financial, and estate planning matters. Ms. Theriault joined the firm in 2011 as an Associate. In October 2012, she was promoted to Managing Associate, where she engages in initiating new business, working on overarching planning issues, managing staff, and leading teams.

Ms. Theriault was named to the 2019 Atlanta Five Star Wealth Managers list that was published in the October 2019 issue of Atlanta magazine. The Five Star award goes to wealth managers who satisfy 10 objective eligibility and evaluation criteria that are associated with wealth managers who provide quality services to their clients.

Prior to joining Henssler, she was an Associate and tax specialist at Homrich Berg in Atlanta, Georgia. Ms. Theriault spent several years at Charles Schwab and Schwab Institutional where she provided relationship management, investment research and product analysis to institutional clients and financial advisers.

Ms. Theriault earned a Bachelor of Science in Accounting and a Master of Business Administration from Western Governors University. She is a Certified Public Accountant, a CERTIFIED FINANCIAL PLANNER™ Certificant and a Certified Divorce Financial Analyst® professional.



*Certified Public  
Accountant*

*CERTIFIED FINANCIAL  
PLANNER™ Certificant*

*Certified Divorce  
Financial Analyst*

*23 Years of Financial  
Services Experience*

*12 Years of Tax &  
Accounting Industry  
Experience*

*2019 Atlanta Five Star  
Wealth Manager*

*Member of American  
Institute of CPAs*

*Member of Georgia  
Society of CPAs*

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*The 2019 Five Star Wealth Managers list published in the October 2019 issue of Atlanta Magazine. For more information on the Five Star award and the research/selection methodology, go to [http://fivestarpromotional.com/ref/research/WM\\_ResearchMethodology.pdf](http://fivestarpromotional.com/ref/research/WM_ResearchMethodology.pdf). Contact Five Star Professional at [info@fivestarpromotional.com](mailto:info@fivestarpromotional.com) for additional information regarding the selection process. The Five Star award is not indicative of a wealth manager's future performance, nor is there any guarantee that the selected professionals will be awarded this accomplishment by Five Star Professional in the future.*

Henssler Financial is a financial planning and money management firm with assets under advisement of \$1.88 billion as of March 31, 2020. Henssler Financial, which includes federally registered investment advisers G.W. Henssler & Associates, Ltd. and Henssler Asset Management, LLC, is headquartered in Kennesaw, Georgia, a suburb of Atlanta, with an additional office in the Atlanta Perimeter area.

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