



Cathal Carson Financial Planner

Cathal Carson is a Financial Planner in the Planning & Implementation Department. His responsibilities include assisting Managing Associate D. James Barker, CWS®, and Associate Peter Lynch, reviewing client asset allocation and cash flow projections, and client services support duties, including processing client information.

Mr. Carson joined Henssler Financial in October 2021 as a Client Service Associate, responsible for preparing and processing documents, performing money transactions at the Financial Planners' and clients' discretion, and processing check deposits and account withdrawals. He was promoted to Financial Planner in June 2022.

Prior to joining the firm, Mr. Carson was a Senior Account Manager at OTR Capital, a transportation-focused company providing cash flow solutions and back-office support to companies across the country. In his six years with the firm, Mr. Carson managed a book of business of 300-400 active clients, purchasing and overseeing more than \$300 million in client receivables, generating over \$15 Million in margins.

Mr. Carson earned a Bachelor of Business Administration in Finance from the Terry College of Business at the University of Georgia, and completed the University of Georgia's Online CFP® Certification Education Program. He also studied Accounting at Louisiana State University.



*10 Years of Financial
Services Experience*

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