Michael Coelho, CFP®

Associate

Michael Coelho, CFP®, is an Associate at Henssler Financial. Having joined the firm in June 2024, Mr. Coelho creates customized financial plans for individual clients, focusing on their goals and helping ensure their assets last throughout their lifetimes. His responsibilities include managing client accounts on a day-to-day basis, analyzing client data, and providing recommendations based on the firm's strict investment criteria. Mr. Coelho works closely with Managing Associate D.J. Barker, CWS®, and Financial Planner Alyson Kountz, providing clients with strategic advice on money management, retirement planning, insurance planning, and estate planning.

Before joining Henssler Financial, Mr. Coelho was an Associate Adviser for nearly five years at American Financial Advisors, LLC, where he provided personalized guidance on managing finances, helping clients make informed decisions about investments, retirement planning, tax strategies, and other aspects of their financial well-being. He also spent four years with Charles Schwab specializing in servicing Institutional Clients, Family Offices, and Registered Independent Advisers, supervising an Institutional Service Team responsible for providing world-class service and support for over 50,000 adviser services clients.

Mr. Coelho earned a Bachelor of Science in Business Administration from William Carey University, and completed the Financial Planning Certificate Program at Boston University. He is a Certified Financial Planner™ Certificant.

Certified Financial Planner™ Certificant

9 Years of Financial Services Experience

Member of Financial Planning Association

Henssler Financial is a financial planning and money management firm with assets under advisement of approximately $3.22 billion as of June 30, 2024. Henssler Financial, which includes federally registered investment adviser G.W. Henssler & Associates, Ltd. and is headquartered in Kennesaw, Georgia, a suburb of Atlanta.

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