



## Alyson Kountz

### Financial Planner

Alyson Kountz is a Financial Planner in the Planning & Implementation Department. Her responsibilities include assisting Managing Associate D. James Barker, CWS®, Associate Michael Coelho, CFP®, and Senior Financial Planner Kenny Duckett, CWS®, reviewing client asset allocation and cash flow projections, developing client investment policy statements, and client services support duties.

Ms. Kountz joined Henssler Financial in June 2021 as an Intern, supporting the Client Service Associates in processing documents, performing money transactions, and preparing client information for planning reviews. Ms. Kountz also assisted with front desk duties. Upon her college graduation, she was offered a full-time position as Financial Planner in June 2022.

Before joining the firm, Ms. Kountz was an Accounting Assistant at the Kennesaw State University Bookstore, assisting with the store's bookkeeping, including keeping track of invoices and credit payments.

Ms. Kountz earned a Bachelor of Business Administration in Finance and a Coles Scholars Program minor from Kennesaw State University. Ms. Kountz is a Registered as an Investment Advisor Representative (IAR) with Series 65 qualification.



*4 Years of Financial  
Services Experience*

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