HENSSLER Financial

Jacob Keen, CFA

Director of Investments

Jacob Keen joined Henssler Financial as a Research Analyst in August 2016, and was promoted to Director of Investments in September 2024. Mr. Keen is part of the Henssler Portfolio Committee that oversees the Henssler Traditional Model portfolio as well as the Henssler Income and Small-Mid portfolios.

As Director of Investments, Mr. Keen evaluates prospective investments by conducting due diligence, monitoring economic conditions, and identifying potential risks and challenges within the portfolio, while developing contingency plans to mitigate them. He oversees investment management activities, including implementing changes and advising the Portfolio Committee on key performance indicators to enhance the long-term value of the firm's investment selections. Mr. Keen also implements performance monitoring systems to optimize investment strategies and operations.

Along with the Director of Research, Mr. Keen serves on the Henssler Portfolio Committee aiding in allocation and selection decisions as well as any other shared portfolio management activities including security analysis, ongoing due diligence, and risk management for all recommended investments held in Henssler Portfolios.

Mr. Keen also provides the firm with company-specific analysis, asset allocation and macro-economic analysis. Additionally, Mr. Keen has contributed to "Money Talks," the firm's financial talk radio show.

Prior to joining Henssler, Mr. Keen worked as a Research Analyst for Capital Management Advisors for two and a half years. Mr. Keen earned a Bachelor of Business Administration, with a major in Finance, from Kennesaw State University. He is a CFA Charterholder and is Bloomberg certified.

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Henssler Financial is a financial planning and money management firm with assets under advisement of approximately $3.41 billion as of March 31, 2025. 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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