HENSSLER Financial

# 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 was named to the 2024 Atlanta Five Star Wealth Managers list that was published in the October 2024 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.

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*

*10 Years of Financial Services Experience*

*2024 Atlanta Five Star Wealth Manager*

*Member of Financial Planning Association*

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*The 2024 Five Star Wealth Managers list published in the October 2024 issue of Atlanta Magazine. For more information on the Five Star award and the research/selection methodology, go to http://fivestarprofessional.com/ref/research/WM_ResearchMethodology.pdf. Contact Five Star Professional at info@fivestarprofessional.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 approximately $3.81 billion as of December 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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