



**FOR IMMEDIATE RELEASE**

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## **Bartlett Wealth Management Announces New CFO**

*Chad Kolde to assume position as Chief Financial Officer in 2022*

**Cincinnati (July 29, 2021)** – [Bartlett Wealth Management](#) ("Bartlett"), a Midwest wealth management firm with offices in Cincinnati and Chicago, is pleased to announce Chad Kolde, CPA, CFE, has joined the firm as Incoming Chief Financial Officer. He will succeed current CFO Thomas A. Steele upon his retirement in 2022. Steele joined Bartlett in January 1988.

In his role as CFO, Kolde will oversee all aspects of the firm's financial functions, including mergers and acquisitions.

"My time at Bartlett has seen me enjoy the most memorable moments of my career. Now, I look forward to passing along my knowledge to Chad," said Steele regarding the announcement. "I'm confident that Chad's education and experience make him the right person for the role. Working together over the next few months, we'll ensure that this is a smooth transition that delivers the service that our client's have come to expect from our firm."

After graduating from The Ohio State University with his Bachelor of Science in Business Administration and Master of Accounting degrees, Kolde began his career at the regional accounting firm Barnes Dennig. His initial work focused on both corporate and individual tax as well as audit work. He later transitioned into a purely audit-focused role, while also performing fraud examinations and forensic accounting analyses.

Kolde currently serves on the board of the Cincinnati Community ToolBank (The ToolBank), an organization with which he has been involved in various capacities since 2014. The ToolBank empowers numerous nonprofit organizations by providing "tools, equipment and expertise to enable those organizations to achieve their most ambitious goals."

"My motivation for coming to work each day is twofold. First and foremost, I strive to serve as an example to my two boys. Secondly, I have always had a passion for helping businesses and individuals from a financial standpoint," said Kolde. "I've been fortunate enough to work for two great companies in my career whose purpose is just that."

"Bringing Chad on board as our next CFO is one that is well-deserved and a testament to not only his work ethic, but the quality of service he will bring to Bartlett," said Jim Hagerty, CFA, Bartlett CEO, wealth advisor and principal. "Our client-centric approach affects the 'how' and

'why' in everything we do. It's a philosophy that's vital to our client's satisfaction and our firm's reputation. I'm confident the addition of Chad will ensure that both remain high for years to come."

To learn more about Bartlett or the team, visit [www.Bartlett1898.com](http://www.Bartlett1898.com).

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#### **ABOUT BARTLETT WEALTH MANAGEMENT**

*Bartlett Wealth Management ("Bartlett") a Midwestern wealth management firm with offices in Cincinnati and Chicago, provides customized investment management and financial planning services to high net worth families, foundations and businesses throughout the Midwest. Bartlett takes pride in providing clients independent, personalized fiduciary advice through a team of distinguished investment and planning professionals. For more information, visit [www.Bartlett1898.com](http://www.Bartlett1898.com).*

#### **Cautionary Note Concerning Forward-Looking Statements**

This release contains certain forward-looking statements that reflect Bartlett's current views with respect to certain current and future events. These forward-looking statements are and will be, subject to many risks, uncertainties and factors relating to Bartlett's operations and business environment, including, without limitation, uncertainty surrounding the current COVID-19 pandemic, which may cause future events to be materially different from these forward-looking statements or anything implied therein. Any forward-looking statements in this release are based upon information available to Bartlett on the date of this release. Bartlett does not undertake to publicly update or revise its forward-looking statements even if experience or future changes make it clear that any statements expressed or implied therein will not be realized. Additional information on risk factors that could affect Bartlett's may be found in the filings with the Securities and Exchange Commission made by Focus Financial Partners, LLC of which Bartlett is a partner firm.