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Bartlett Wealth Advisors Earn Prestigious RLP Designation

Lori Poole and Woodrow Uible Receive Designation from the Kinder Institute of Life Planning

Cincinnati (November 11, 2019) – Bartlett Wealth Management, a leading Midwest wealth management firm, is pleased to announce that Lori Poole and Woodrow Uible, both wealth advisors and principals at Bartlett, have earned the Registered Life Planner® (RLP®) designation after completing the Kinder Institute of Life Planning's intensive program.

Lori Poole is also a Certified Financial Planner™ (CFP). Her areas of interest include high net worth individuals, multigenerational wealth, and ESG investing strategies. She has a long-time passion for extending financial literacy, especially to underrepresented groups and aspiring female leaders. She has a bachelor of business administration degree in finance and real estate from University of Cincinnati, where she graduated cum laude.

In addition to his RLP® designation, Woody Uible is also a Chartered Financial Analyst. He is experienced in wealth management for individuals, families and organizations; and common stock-focused investing. Uible is active in volunteer efforts throughout the community, including recently collaborating to establish the Kautz Uible Economics Institute at his alma mater, the University of Cincinnati. He received his bachelor of arts in economics from the university.

ABOUT THE RLP® PROGRAM
Poole and Uible are part of a select group of advisors who help clients connect the dots between their financial realities and the lives they long to live. The Kinder Institute's tools and trainings allow financial planners to work with clients to cultivate a life plan designed to deliver the freedom to pursue their passions, wherever they may lead.

To earn this designation, both had to complete a two-day training on the Seven Stages of Money Maturity led by George Kinder himself, a five-day advanced training to master skills needed to life plan with instructors and other trainees, and a subsequent six-month mentorship program.

WHAT IS LIFE PLANNING?
Life planning focuses on the human side of financial planning. In life planning, advisors discover their clients' most profound goals through a mindfulness-based process of structured and non-judgement inquiry. Then, using a mix of professional and advanced relationship skills, they work with clients to inspire them to pursue aspirations, discuss and resolve obstacles, create a concrete financial plan, and provide ongoing guidance as clients accomplish their goals.

ABOUT BARTLETT WEALTH MANAGEMENT

Bartlett Wealth Management ("Bartlett"), a leading 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.

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