



FOR IMMEDIATE RELEASE

Media contact:

Krystan Krailler, Scooter Media

krystan@scootermediaco.com | (513) 257-7262

Bartlett Welcomes First Financial Planner to Chicago Office

Cincinnati (January 16, 2020) – Bartlett Wealth Management, a leading Midwest wealth management firm, is pleased to announce that Melissa Mabley, CFP, CDFA recently joined the Chicago office as a wealth advisor with an expertise in financial planning.

“We’re delighted to welcome Melissa as the first financial planner in our Chicago office,” said Kelley J. Downing, president and CEO of Bartlett Wealth Management. “She has a wealth of experience as an advisor helping clients pull all their finances together, solve problems or issues and advance their financial goals with individualized planning services.”

As a wealth advisor with expertise in financial planning, Mabley will focus on clients in transition. She is particularly skilled in supporting clients through major life events such as death or divorce. She also performs next generation education and planning to support multi-generation families.

Mabley earned her bachelor of arts in Spanish literature from Indiana University and her MBA from the University of Michigan. Most recently, Martin worked as a senior financial planner for four years at Kovitz Investment Group. Prior to that, she worked as a wealth advisor with RMB Capital Management, as a vice president with US Trust and as an associate with LaSalle Bank Corporation. She currently holds certifications as a Certified Financial Planner™ (CFP) and Certified Divorce Financial Analyst® (CDFA®).

"Working closely with individuals and families to help create detailed roadmaps for their continued financial success, as well as reach their legacy goals, however they choose to define them, is both motivating and rewarding," Mabley said.

When she’s not at the office, Mabley enjoys a variety of activities, from baking to sailing and swimming to needlepoint and calligraphy. She serves on the board of Tuesday’s Child, an intervention program that helps families address behavioral issues through individualized training for both parents and children.

To learn more about Bartlett or the team, visit www.Bartlett1898.com.

###

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.