



Kelley Downing

President & CEO, Wealth Advisor, Principal



For more than 22 years, Kelley Downing has served as a guiding force for clients at Bartlett Wealth Management and within the community. In her role as a wealth advisor, Kelley blends her keen understanding of the industry with her sincere interest in the clients she serves. Her strong strategic thinking and listening skills enable clients to clarify and articulate their goals.

As the first woman to serve as President and CEO of Bartlett, Downing has spearheaded innovative efforts to make Bartlett a leader in the region and industry. Under her guidance, the firm has expanded to provide Wealth Management services – a culmination of Financial Planning with Investment Management. Her expertise has been instrumental in the development of new Bartlett Fund Advantage (BFA) strategies for both institutional and private clients. She formed a mentoring group for junior Bartlett employees to better prepare them as future leaders of the firm and the community. She has also overseen

significant advances in technology, a paperless environment, an online client document portal, virtual desktops and Bartlett's own cloud system.

Because of Kelley's reputation as a strategic thinker and a roll-up-your-sleeves community supporter, organizations throughout the area have sought her involvement. She has personally served in leadership roles for arts, social service, education and charitable organizations and provided Bartlett's corporate support to many nonprofit groups.

Under Kelley's leadership, Bartlett has earned more than a dozen national recognitions, most recently ranked by Bloomberg as the number two Registered Investment Advisory firm in the nation that also provides financial planning.

Areas of Expertise

ESG Investing

Succession planning

Navigating difficult life transitions

Investing for women

Protecting seniors from financial fraud

Financial wellbeing after divorce

Interview and Media Experience

[Bartlett Partners with Focus Financial Partners](#),

Cincinnati Business Courier

[Bartlett CEO recalls some very late nights before her day in the sun](#), Cincinnati Business Courier

[Bartlett Wealth Management](#), U.S. Bank

Business Watch

[Flush with PE cash, M&A deals for RIAs accelerate](#), Financial Planning Online

Public Speaking Experience

Women in Leadership Symposium, Miami University

How will the stock market be impacted by a new president, Cincinnati Women's Capital Club

Outstanding contributions of local women leaders, West Chester Chamber Women of Excellence Awards

Importance of education in finance/investments, Northern Kentucky University

Investment and estate planning, Good Samaritan Hospital Foundation Planned Giving Series

Managing your peers, Thomson Hine

How to achieve success in a male-dominated environment, Taft Women in Leadership

Managing disruption in our industry, Business Watch TV guest speaker

How to protect your investments in a collapsing market, Greater Cincinnati Planned Giving Council