



## Kyle Pohlman, CFA, CAIA

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### Wealth Advisor, Principal



Kyle Pohlman, CFA, CAIA, is a Wealth Advisor and a Principal at Bartlett Wealth Management, where he focuses on investment management for individuals and their families, foundations and endowments, and performs portfolio analysis. Because of his experience in the subject, Kyle chairs our alternative investment committee. He is a Chartered Financial Analyst and a Chartered Alternative Investment Analyst.

Kyle is a Summa Cum Laude graduate from the University of Cincinnati with a Bachelor of Business Administration in Finance. He serves on the Finance & Investment Committee for the Contemporary Arts Center (CAC), and is also a founding member of *The 50*, an organization that allows entry to the CAC to be admission free. He is

the past co-chair of Young Professionals of the American Cancer Society (YPACS), where he was involved for eight years.

Kyle was named to the *Cincinnati Business Courier's* Forty Under 40 Class of 2016. He was named a Five Star Wealth Manager in 2017 and 2019. He joined Bartlett Wealth Management in 2003 and has more than 17 years of investment experience.

### Areas of Expertise

Alternative investments  
Asset allocation  
Equity strategies  
Fixed income strategies

Generational wealth management  
Business owner strategies  
Generational wealth transfer strategies

### Interview and Media Experience

[\*Cincinnati investment adviser Pohlman is mechanic at heart\*](#), Cincinnati Business Courier

### Public Speaking Experience

*UC Co-op*, panel presentation to students  
*Bartlett Annual Market Outlook*, 2020, 2018, 2015

*Adulting is Hard*, Bartlett Wealth Management event  
*Forty Under 40 Panel*, Cincinnati Business Courier

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