



Lori B. Poole, CFP®, RLP®

Wealth Advisor, Principal



Lori B. Poole, CFP®, RLP®, is a Wealth Advisor and Principal at Bartlett Wealth Management, where she provides investment management and financial planning services to high net worth individuals and their families, especially in times of transition. Lori also assists the lead advisor on the Environmental, Social, Governance (ESG) Investing strategy. She is a Certified Financial Planner, Registered Life Planner and a National Social Security Advisor Certificate Holder.

Lori is a Cum Laude graduate of the University of Cincinnati with a Bachelor of Business Administration in Finance. She was awarded the Cincinnati Business Courier's 40 Under 40 award, and the Queen City Young Professionals Accolades, "Risk Taker" Award. She is president

of the University of Cincinnati Economics Center YP Board; member of the University of Cincinnati Foundation Gift Planning Committee, Cincinnati Business and Professional Women's Scholarship Fund, and ArtsWave Women's Leadership Roundtable.

Lori joined Bartlett in 2009 and has ten years of investment experience.

Areas of Expertise

Financial planning for women during life transitions

Retirement planning

Social security

Cash flow planning

Debt management

Deferred compensation

Legacy planning

Multi-generational family planning

Maximizing savings early for sound retirement

Interview and Media Experience

[Estate planning roundtable 2018](#), Cincinnati Business Courier

Public Speaking Experience

Social Security Planning, University of Cincinnati retired employees

Financial Stewardship, Bartlett YP event

Panelist: Bartlett Market Outlook, 2019

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