# Financial Advisor Firm Sees A 64% Increase in Growth

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Gessner Wealth Strategies added new clients with webinars and educational retirement planning classes.

Gessner Wealth Strategies has grown this year, bringing a 64% increase in assets under management. Gessner Wealth is a small boutique financial planning firm with concierge-style service and comprehensive estate planning. They assist clients with generating income, and protecting financial assets, offering guidance and clarity for whatever financial decisions that come up.

One reason for Gessner Wealth's growth is attributed to the educational retirement planning classes taught at a local community college. A webinar was held in place of in-person learning due to the pandemic. The courses cover topics like tax law changes, benefits of Roth Conversion, and maximizing Social Security Income.

"I am passionate about building a life plan for my clients and helping them see that they have choices," says Michelle Gessner, CFP®, MSM, CFBS, LUTCF, Founder and Owner of Gessner Wealth Strategies, LLC. "I'm a big believer in partnering with my clients and ensuring that they are empowered to make their own important decisions."

Michelle Gessner is an active participant in the Financial Planning Association's Media Program. Gessner has been approached by several reporters to be interviewed about financial planning. Her exposure in different articles, including one in MarketWatch, the website that provides financial information, business, news, analysis, and stock market data, has also led to new clients.

Gessner Wealth Strategies has resources from experts in tax and investment research while maintaining a small firm's personal service. They incorporate tax planning as part of their service to help reduce taxes in retirement and stay on top of the latest tax legislation related to IRA's. They are a part of the Ed Slott Elite Advisors Group with access to their office for complex questions.

Gessner Wealth Strategies is a Houston, Texas-based financial advisor firm that works with clients across the United States. It was formed in 2015 by Michelle Gessner to offer guidance and clarity in financial matters, from generating income to protecting a client's financial security. Gessner's investment philosophy is academic and evidence-based.

For more information, please go to https://gessnerwealthstrategies.com.

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**Michelle Gessner**

*As your trusted advisor, our job is to help you make smart decisions about your money. But our personalized approach is about so much more than that*

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GESSNER WEALTH STRATEGIES, LLC