



## **WILLIAM L. MEHSERLE JR., AIF®, CFP®, CPWA®**

**PARTNER, PLANNER**



Loveland Center



William (Bill) L. Mehserle, Jr. is a CERTIFIED FINANCIAL PLANNER™ practitioner, Certified Private Wealth Advisor® professional, and Accredited Investment Fiduciary®. He has worked in the wealth management field since 2013 and specializes in objective-based comprehensive wealth management and planning.




Bill is a graduate of The Georgia Institute of Technology where he graduated summa cum laude with a B.S. in Chemical and Biomolecular Engineering. Bill continued his studies at Emory University to meet the rigorous education, examination, experience, and ethics requirements necessary to earn his CERTIFIED FINANCIAL PLANNER™ (CFP®) designation. In addition, he studied at Yale University to attain the Certified Private Wealth Advisor® (CPWA®) certification, an advanced professional certification for advisors who serve high-net-worth clients. Designed for seasoned professionals who seek the latest, most advanced knowledge and techniques to address the sophisticated needs of clients with a minimum net worth of \$5 million, it is unlike credentials that focus specifically on investing or financial planning. The CPWA® certification program takes a holistic and multidisciplinary approach.

Since dedicating his career to financial services, he has been named multiple years by Forbes as a Top Next-Gen Wealth Advisor. The list includes 1,000 advisors selected from more than 24,000 applications and a pool of more than 200,000 eligible young advisors throughout the U.S.

Prior to joining PFS Financial, Bill co-founded a billion-dollar registered investment advisor and was a director at one of the ten largest private wealth management firms in America..

Bill is an advocate for charitable organizations in the community, having served on the board of the Gulf Coast Community Foundation (GCCF) which oversees long-term charitable initiatives along the Gulf Coast of Florida. In addition, he has served on the board of The Loveland Center (helping adults with intellectual and developmental disabilities to live their lives to the fullest), the board of Family Promise (dedicated to helping those in temporary need of housing), the Sheriff's Advisory Board, and remains active in Rotary.

Bill enjoys taking his dog, Nolen, to the dog beach and on runs after the closing bell.



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