

For Immediate Release:

Van Heule Joins Kehrer Bielan

Consulting Firm Adds Financial Planning Change Agent

CHAPEL HILL, NC AUGUST 23, 2018: Kehrer Bielan Research & Consulting announced that Leigh Van Heule CFP®, AWMA®, CRPC®, CRC® has become an Associate of the firm. Peter Bielan, a principal of Kehrer Bielan, explained that Van Heule will lead the firm’s financial planning consulting practice, helping firms and their advisors realize the transformative power of financial planning.

“As an advisor Leigh intuitively grasped that understanding her clients’ needs, wants, and wishes empowered her to offer solutions to achieve what was important to them, and realized that she wasn’t selling, but building relationships,” Bielan noted. “Based on that experience, she spent the next 10 years coaching advisors at JPMorgan Chase, PNC Investments and most recently at BMO Harris Financial Advisors, where she transformed its financial planning program. Now she is providing that expertise and energy to firms looking to bring their financial planning vision to the next level, to achieve true adoption of the financial planning process into their business practices and improve not just the number of plans produced, but the quality of those plans. This fits perfectly with the Kehrer Bielan belief that financial profiling, planning and holistic advice are the future of our industry.”

“I couldn’t ask for a better opportunity to work collectively to have a greater impact,” Van Heule commented. “By integrating my consulting practice with the highly regarded research and consulting team at Kehrer Bielan, we’ll be able to reach more firms to develop more effective client centric goals-based programs and ultimately build an industry that embraces financial planning at all levels. This is an exciting opportunity and an exciting time to be part of this industry!”

About Kehrer Bielan Research & Consulting. KBR&C provides the financial advice industry with insights based on a melding of research and experience in managing the delivery of investment, insurance, and wealth management services. The firm provides performance assessment and benchmarking, human resource management and development, due diligence, consumer insights, and interpretation of industry trends through its original research, unbiased consulting, and peer study groups.

Please visit us at www.KehrerBielan.com or e-mail info@kehrerbielan.com for more information.