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NEWS

For Immediate Release

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Do You Trust Your Financial Advisor?

Bernhardt Wealth Management Offers Comfort to Questioning Investors

McLean, VA (May 18, 2010) – The Dow Jones Industrial Average dropped 700 points in just ten minutes on May 10. Since the Great Recession started in mid 2007, over two trillion dollars of wealth has evaporated. According to the Conference Board, consumer confidence in 2009 plunged to an all-time 41-year low. According to market research, the continuing turmoil has 86 percent of investors thinking twice about their financial advisors.

To help local investors questioning the quality of advice they have been receiving, Bernhardt Wealth Management (BWM) is now offering qualified investors in the D.C. area a free financial assessment.

"Who can blame them," asks Gordon Bernhardt, founder and president of BWM. "Given that so many so-called financial experts saw their predictions crumple in the wake of the recent economic crisis, of course people are skeptical."

Throwing their hands in the air and declaring they could do the job better themselves, some are left questioning whether utilizing a financial advisor at all is still pertinent. Bernhardt advocates for more investors exercising due diligence and asking questions, but not to throw in the towel just yet.

"A properly vetted financial professional can help you to take a therapeutic, big picture view of your finances," says Bernhardt. "Yes, market volatility likely will continue but an advisor should be listening to your fears, goals and dreams in order to develop and implement a plan designed to see you through the ups and downs of life."

Planning is the antidote to anxiety and an independent second opinion may provide some additional measure of comfort. It can either confirm that the existing advisor is on the right track, or possibly highlight how different advisors work.

Bernhardt proposes several questions investors should be asking.

- Are you concerned that your goals and vision of the future are in jeopardy?
- Is there alignment between your long-term financial strategy and investments?
- Do you have someone you can turn to that will review your entire financial situation including investments, insurance, estate planning, tax mitigation and charitable giving, to help ensure you are making smart choices right now?
- Have you structured the right plan for turbulent markets?
- Does your current advisor invest the time to understand you, your family and your unique situation?
- Are you working together with your advisor, as a team, to effectively implement your plan?
- Do you trust your financial advisor?

"If you are not confident in the answers to these questions, then you might benefit from a professional second opinion," says Bernhardt. "We'll set up a discovery meeting to discuss your unique needs and circumstances, then put together a gap analysis and layout a basic plan."

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About Bernhardt Wealth Management

Gordon J. Bernhardt, CPA, PFS, CFP®, AIF® of Bernhardt Wealth Management in McLean, Virginia provides financial planning and wealth management services to affluent individuals, families and business-owners throughout the Washington, DC area. He is a Certified Public Accountant and Personal Financial Specialist. Committed to a higher fiduciary standard of excellence, he has earned the professional designations of CERTIFIED FINANCIAL PLANNER™ professional and Accredited Investment Fiduciary®. Gordon received his degree in commerce from the University of Virginia. Since establishing his firm in 1994, he has been focused on providing high-quality service and independent financial advice in order to help his clients make smart decisions about their money. For more information, visit www.bernhardtwealth.com

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