

THE BAHNSEN GROUP TO OPEN NASHVILLE OFFICE

Growing company's fourth location to launch Q1 2022

[Nashville, TN) – The Bahnsen Group announced that they have signed lease agreements and made the first advisor hire towards the opening of a fourth company location, this time in the explosive market of Nashville, Tennessee. The office will officially open in the first quarter of 2022, with additional hires forthcoming between now and then. The office will be based in the heart of downtown Nashville at the SunTrust Plaza (401 Commerce Street). The primary intent of the new location is to house additional advisory and administrative personnel – entirely new hires – with no relocations from the company's Newport Beach, Manhattan, or Minneapolis offices.

“We added our Minneapolis office this summer because of the synergies and alignment we found with a particular team [Story Capital] that we have since integrated into the Bahnsen Group. But this Nashville office is going to be built from the ground up, purely out of our desire to put a flag in the Nashville market,” says Managing Partner David Bahnsen. “This is one of the most dynamic, growing cities in America. We have significant client interest in our content, platform, and core beliefs there and throughout the whole southern region of the country, and we could not be more excited for this expansion.”

The firm has hired Brian Miller, formerly a Regional Consultant at Alliance Bernstein, as its first advisor hire. He will train in Newport Beach for the next several months as the office space is built out and prepared for its Q1 launch. The firm is beginning a search for an Office Manager, an Operations Associate and will potentially consider additional advisory talent as well.

“For five years, I have worked bi-coastally between Newport Beach and New York City, and that will not be changing whatsoever for me personally. We will continue growing all of our offices as needs arise and resources require,” says Bahnsen. “Our plan is to see our Nashville presence grow substantially in the years to come, and we want to bring our geographical presence to what has become one of the most desirable places to live and work in America. Several of our initial Nashville clients are not just native Tennesseans, but also those who have relocated to Nashville that we have worked with for many years in California.”

All of the firm's offices are fully open, with all employees required in-office for over a year now.

In September, the firm added Joseph Klein to direct its Services and Planning Department as well as play a key role in its family office launch. Liping Ouyang was subsequently added as an Equity Analyst in the Solutions and Analytics Department. Evan Bozymski recently began as a Private Wealth Advisor in the New York City office. The Bahnsen Group manages \$3.2 billion of client assets and currently has 37 employees in its three offices.