

## THE BAHNSEN GROUP OPENS NEW PALM BEACH, FLORIDA OFFICE

The Bahnsen Group is pleased to announce the opening of a brand new office in Palm Beach, FL. Co-CIO and partner Brian Szytel and Jeremy Polon will drive the practice's expansion in Florida. Jeremy will relocate from the Newport Beach, CA office, where he has been a Planning Department associate and now serves as an Associate Private Wealth Advisor.

"As was the case when we expanded into Phoenix and before that Austin, the Florida market is already a substantial part of our business, and it has been a priority for us to establish a beachhead in Florida for a couple of years," says David Bahnsen, Managing Partner of The Bahnsen Group. "Having a senior leader like Brian drive this expansion and moving next-gen talent like Jeremy to the market is a sign of our seriousness in the endeavor. There are few states in the country governed as well as Florida, and we intend to live up to that high bar in what we bring to the market."

The company has signed a long-term lease at the One Clearlake Centre, located at 250 S. Australian Ave. in West Palm Beach. An earnest search for Operations staff is underway in advance of the office opening in July of 2024.

"This is going to be a significant endeavor for TBG and provide us the capacity we desire to properly serve clients in Florida," says Szytel. "Over time I believe it will compete with our other offices to be the largest satellite office we have in terms of client and asset stewardship."

The Bahnsen Group currently manages \$5.5 billion with north of \$250 million based in Florida, with clients throughout the state in a dozen different cities. This represents the eighth location for The Bahnsen Group, with other offices in Newport Beach, New York City, Minneapolis, Nashville, Bend, Austin, and Phoenix. All 63 employees of The Bahnsen Group are in-office five days a week at all locations.

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