

Audrey Wehr Jones, CFP®

Wealth Architect, CERTIFIED FINANCIAL PLANNER Professional™

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Summary

I believe everyone should have the Time & Freedom to follow their dreams. And when roadblocks arise, someone to lean on. Time for Family, Friends and Business. You can have an independent unbiased coach to help the individual or plan sponsor that will keep you on track regardless of your situation. I am here to help you organize your affairs and keep you that way. Audrey W. Jones is a Fee-Only CERTIFIED FINANCIAL PLANNER™ professional with almost 20 years of experience. She is an expert in helping her clients obtain and sustain their goals and lifestyles through making smart money decisions along the way. She operates as a fiduciary and is a registered investment advisor representative of Bauerle Financial, Inc. Review Bauerle Financial, Inc. form ADV Part 2A, at www.FinancialLifeDesigns.net. Specialties: Retirement, Estate, Cash Flow, and Tax Planning.

Experience

President / Wealth Architect at Financial Life Designs LLC

March 2010 - Present (5 years 6 months)

We are a fee-only financial planning firm. The firm provides Holistic Comprehensive and Long-term personal Financial Planning to individuals. Clients receive detailed financial evaluations and recommendations, including Cash Flow, Assets Preservation, Tax Planning and Estate Distribution, Investment Strategies. Develop and implement growth and marketing strategies.

Wealth Coach at CPA Wealth Management Services

January 2008 - December 2009 (2 years)

Wealth Coach Provides comprehensive and long-term personal financial planning to individuals and education to retirement plans in a fee based financial firm with a client base of 125+ and clients assets totaling over \$250 million. Clients receive detailed financial evaluations and recommendations, including Cash Flow, Assets Preservation, Tax Planning and Estate Distribution, Investment Strategies. Creates client financial plans and conducts client reviews. Develops marketing strategies for the Orlando office.

Vice President of Planning at Financial Management Concepts

January 1997 - January 2008 (11 years 1 month)

Provided comprehensive and long-term personal financial planning in a fee based financial firm with a client base of 100+ and clients assets averaging \$800,000 each. Clients received a detailed financial evaluation and recommendations, including Cash Flow, Assets Preservation, Tax Planning and Estate Distribution, Investment Strategies. Developed client financial plans and conducted client reviews.

401k Educational Speaker at G. R. S

January 1997 - January 2002 (5 years 1 month)

An Independent Contractor which instructed and/or gave workshops to groups of current or new 401(k) enrollees. Spoke on all 401(k) aspects from the basics to the company's actual plan details in easy to understand terms. Educated the participant on Asset Allocation and how to research their investment choices. By company request, provide short one-on-one 401(k) consultations to employees.

Honors and Awards

2014 President's Award

Casseberry Chamber of Commerce

December 2014

In recognition for your outstanding contributions, leadership and achievements in service to our Chamber.

2013 President's Award

Casselberry Chamber of Commerce

December 2013

For Outstanding Contributions, Commitment and Dedication to the Casselberry Chamber of Commerce

2012 Chamber Member of the Year

Casselberry Chamber of Commerce

March 2013

Publications

When a Client Struggles with Memory Loss

Wall Street Journal June 18, 2013

Authors: Audrey Wehr Jones, CFP®

Audrey is featured in this Wall Street Journal blog.

Organizations

NAPFA South Region Board

Scholarship Chair

August 2015 to Present

Also a participant in the Building Homes for Heroes and Women's Initiative

CFP Board

CFP Board Council on Education

January 2012 to December 2014

St Luke's Lutheran Church and School Foundation

Investment Committee Chair

January 2012 to Present

Casselberry Chamber of Commerce Board of Directors,

Events and Silent Auction Chair

January 2014 to Present

Education

College of Financial Planning

CFP, Financial Planning, 1997 - 1999

University of Central Florida

BA, Communication, 1976 - 1979

Activities and Societies: Radio and TV, Music and Theater

Winter Park High School

Communication, 1973 - 1976

Activities and Societies: Select Ensemble, Choir, Orchestra, Jazz Band, Honor Society, Spanish Honor Society
