

# Shomari Gilyard, CFP, Director, Wealth Planning, has been made a partner at KF Advisors

NEW YORK, N.Y., Jan. 12, 2021 (SEND2PRESS NEWSWIRE) – Klingenstein Fields Advisors (KF Advisors)\*, a leading wealth management firm with approximately \$4 billion in assets under management as of 12/31/2020, is pleased to announce that Shomari Gilyard, CFP®, Director, Wealth Planning, has been made a partner of the firm. At KF Advisors, Shomari and his team are responsible for helping clients find solutions to address their investment, estate planning, tax, cash flow, insurance, retirement, borrowing, and philanthropic goals.



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“Our clients benefit from Shomari’s expertise and experience helping individuals, families, and non-profits proactively plan for their short- and long-term goals,” said Kenneth D. Pollinger, CEO and Co-Chairman of KF Advisors. “His dedication to our clients’ well-being is unmatched, and we are pleased to recognize his strong contribution to the firm’s success.”

Shomari joined KF Advisors in 2015 to enhance planning capabilities and

develop a team of talented and experienced planners. Prior to KF Advisors, he held senior planning roles in Private Wealth Management at U.S. Trust and Ayco, a Goldman Sachs company. Shomari began his career at Morgan Stanley as an advisor.

He is certified by the CFP Board as a CFP®, CERTIFIED FINANCIAL PLANNER™. He graduated with a B.S. from Rutgers. He received an M.B.A. from Alfred Lerner College of Business and Economics at the University of Delaware with a concentration in Finance.

\*Klingenstein Fields Advisors represents the following affiliated investment advisors registered with the Securities and Exchange Commission: Klingenstein Fields & Co., L.P. and KF Group, L.P.

More information: <https://www.klingenstein.com/>.

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