



As a Bahnsen Group Managing Director/Partner and the Financial Planning Director, Kimberlee specializes in personal wealth advising and oversees financial and retirement planning solutions for high net worth individuals and multi-generational families. She creates, and guides implementation of, cohesive strategies that incorporate all aspects of clients' financial lives. Kimberlee's proficiency also includes helping individuals transition to financial independence after life-altering events such as death or divorce. She is a *Certified Divorce Financial Analyst®*, and has strong experience and knowledge that enables her to analyze and consult on, both the short and long-term financial impact of a range of divorce settlements. These skills, coupled with her wealth management experience, provides an experienced voice for any pre/post-divorce team.

Kimberlee has established *The Fiscal Feminist*, a platform from which she strongly advocates for women through her passion to empower and educate them concerning their finances. Kimberlee joined The Bahnsen Group at Morgan Stanley in 2014 and was later part of the transition as the Group sought the "fiduciary" route in 2015.

Kimberlee has a diverse background and more than 25 years of finance, legal and corporate experience. She formerly worked as a corporate securities lawyer, investment banker, and Chief Financial Officer. Kimberlee received her Bachelor of Science in Foreign Service/International Finance, at Georgetown University and also earned a Juris Doctor from Georgetown University Law Center. She currently holds the Series 7 and 66 licenses and the California Life and Health Insurance License.

Kimberlee serves as the Vice Chairwoman for *The Valiant Women of the Mission Hospital Foundation* in Mission Viejo, California which supports Women's Health Care and Nursing Education. She is also a Board Member and the Treasurer of *The Foundation for Women*

*Warriors* which is a support organization created exclusively to serve the female veteran community with essential programs to empower the personal and professional development of women veterans after their service careers. Kimberlee is an active member of the *British American Business Council* of Orange County where she sits on its *Board of Directors* and its *Commerce Committee*. In 2017, she was named as an *Advisory Board Member for the University of California, Irvine - The Paul Merage School of Business Center for Investment and Wealth Management*. Kimberlee is an active member of *Gen Next*, a recognized member of the *Connected Women of Influence of Orange County*, and previously, was the President of *The Junior League* of Northern Westchester, New York.

Kimberlee is the proud mother of three amazing daughters Allison, Claire, and Merrill. Having lived in New York and London before moving to Orange County, Kimberlee enjoys traveling and experiencing other cultures.