



NEETU KOHLI, AAMS
Advisor Development Manager

703-810-1072 x146
800-269-2156 x146
nkohli@nwfillc.com

200 Spring St. #120
Herndon, VA 20170
nwfillc.com

MEET NEETU.

A TRUSTED MEMBER OF YOUR NWFA WEALTH MANAGEMENT TEAM.



Neetu Kohli joined Northwest Financial Advisors in June 2021 after working in financial services for several years.

Neetu started her financial services career in 1995 and brings to our firm an understanding of asset management, retirement planning, life insurance and estate planning, as well as expertise in planning, CRM and other financial services technology. She leverages this deep knowledge and experience to support the successful onboarding, development and technical training of our advisors, ensuring their ability to provide exceptional service and deliverables to our clients.

Neetu spent her childhood in the Himalayan foothills and received a degree in Business Administration and Human Resources in India. She has continued her career-related education, earning the professional designation of Accredited Asset Management Specialist (AAMS) from the College of Financial Planning. Neetu also completed a Certificate in Leadership from Sloan School of Management, Massachusetts Institute of Technology, and holds FINRA Series 7, 63, 65 and 9/10 licensing.*

She has a great passion for giving back to the community and volunteers to promote education for underprivileged children. In her spare time, she writes children's books and is a published children's book author.

* FINRA Series 7, 63 and 9/10 and 24 licenses held with LPL Financial. Series 65 held with Northwest Financial Advisors.

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