NORTHWEST FINANCIAL ADVISORS

NEETU KOHLI, AAMS
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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 began her financial services career in 1995 and has 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 leveraged this deep knowledge and experience as our Advisor Development Manager to support our advisors' successful onboarding, development and technical training, ensuring their ability to provide exceptional service and deliverables to our clients. In December 2022, Neetu was promoted to Assistant Vice President of Wealth Management. In addition to her advisor development role, Neetu oversees our branch-based advisors and intern academy, working closely with the financial advisors and credit union leadership to augment relationships and promote growth.

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

Neetu is passionate about giving back to the community and volunteers to promote education for underprivileged children. She writes children's books in her spare time 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.