THEO DESMULIER, CFP®, CEPA®

ADVISOR
Wealth Management

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Université Catholique de Lille
Bachelor's, international business, trade, finance and tax law

I always have my clients' and prospects' best interest in mind. I work to build trust over time through the recommendations I make.

CURRENT ROLE

Theo develops creative strategies that help clients meet their financial goals, integrating asset management, retirement plan and succession planning services with overall business and financial plans. He works with a cross-functional Rehmann team to proactively guide each client, considering tax law and efficiencies, estate planning, and accounting needs along the way. Theo is based in Rehmann's Orlando office, with a presence in the Bonita Springs location as well.

SERVICE AREAS

- Comprehensive financial planning
- Retirement and estate planning
- Retirement plan consulting
- Risk management
- Investment analysis and portfolio design

EXPERIENCE

Theo began his financial services career in 2018 and has supported a variety of clients across industries. He has extensive knowledge of cashflow, debt management, taxes, investments, insurance, business and estate planning, and the many facets of qualified and non-qualified retirement plans.

Theo is passionate about professional development and supports this by maintaining an in-depth understanding of financial planning, capital markets and the financial services industry. He also works diligently to uphold the goals, values and expectations of Rehmann's clients.

Prior to joining Rehmann in 2022, Theo was a financial planner and office manager at Raymond James, where he received the CFP® certification from the Certified Financial Planner™ Board of Standards. Theo holds the Series 7 and 66 securities registrations, and life and health insurance licenses. Theo also holds his Certified Exit Planning Advisor (CEPA®) certification, taking a holistic approach to help business owner clients develop strategies that integrate all aspects of their lives.

A CLOSER LOOK

- Theo has a thorough understanding of the strategic technologies that allow Rehmann to drive client satisfaction, specifically, but not limited to CRM, portfolio management and financial planning tools.

Securities offered through Rehmann Financial Network, LLC, member FINRA/SIPC. Investment advisory services offered through Rehmann Wealth, a Registered Investment Advisor. Insurance services offered through Rehmann Insurance Group. Certified Financial Board of Standards Inc. owns the certification marks CFP®, Certified Financial Planner™ and federally registered CFP in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. 9420 Bonita Beach Road, Suite 200, Bonita Springs, FL 34135 | 239.992.6211

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