

PREMIER

WEALTH ADVISORS

JOSH KOEHNEN,
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Managing Partner



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Josh is one of the Founding Partners of Premier Wealth Advisors, LLC. He is a CERTIFIED FINANCIAL PLANNER™ *professional* and Investment Advisor Representative offering advisory services through Premier Wealth Advisors (PWA), a registered Investment Adviser. Securities and additional advisory services offered through Independent Financial Group, LLC (IFG), a registered broker dealer and a registered investment adviser, member FINRA and SIPC. PWA and IFG are unaffiliated entities. He is securities registered in California and several other states.

His experience in business and personal financial decision making are brought to bear in developing well thought out approaches in the areas of tax, retirement planning, estate planning and risk management.

Josh graduated Magna Cum Laude from San Diego State University with a degree in Finance. A Masters Degree in Finance and Tax Planning further enhanced the detail of his knowledge. Josh is an Investment Advisor Representative offering advisory services and securities through Independent Financial Group LLC, a registered Broker-Dealer and Investment Advisor, member FINRA and SIPC. He is securities registered in California and several other states. Josh is a licensed real estate broker and a member of the National Association of REALTORS®. He is also licensed to engage in the business of insurance in the State of California (Insurance Lic. #0E38312).

Josh resides with his wife Chelsea and daughters, Kaylie, Ella and Avery in Carlsbad and currently stands on the Advisory Board of the San Diego State University Aztec Club. In his spare time, Josh likes to spend time with family, travel, camp, golf, read and play basketball.

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