TFC Financial names VP Michael Meehan as Shareholder

BOSTON, January 21, 2022--TFC Financial, an independent, fee-only financial advisory firm that is majority-owned by its staff, announced today that Vice President and Client Advisor Michael J. Meehan has become the firm's newest shareholder.

Mr. Meehan joins a group of employee-shareholders, which include Renée Kwok, CFP®, President & CEO; Daniel S. Kern, CFA, CFP®, Chief Investment Officer; Leann N. Sullivan, CFP®, CAP®, Vice President and Client Advisor; and Constance H. Wyllie, Vice President of Client Service and Operations & CCO.

"Expanding our circle of TFC shareholders to include Michael supports our long-term strategic goal of remaining privately-owned and independent for future generations of clients and employees,'' said TFC Financial CEO Renée Kwok. "It also reflects the important role Michael has taken on as a senior executive at TFC and the great value that he has brought already to our clients and to the firm and will in the future.''

Mr. Meehan, who joined TFC in the spring of 2020, is a CERTIFIED FINANCIAL PLANNER™ Professional, a Certified Public Accountant, and Personal Financial Specialist (PFS) as designated by the American Institute of Certified Public Accountants.

Prior to joining TFC, Mr. Meehan was a senior director with BNY Mellon Wealth Management, where he served for nearly 20 years, working with high-net-worth clients to develop and implement comprehensive financial and investment plans. He also served as an assistant vice president for State Street Corporation.

"It's been incredibly fulfilling to bring my experience at two major global financial firms to TFC's independent, highly personalized model of service, putting clients' interests first with 'advising beyond investing,' '' Mr. Meehan said. "I'm honored by the opportunity to make this long-term commitment to the success of TFC's clients and our firm through becoming a shareholder."

Mr. Meehan is a Member of the Massachusetts Society of Certified Public Accountants and the Financial Planning Association of MA. Mr. Meehan earned his Masters in Personal Financial Planning and Bachelor of Science in Accountancy from Bentley University. He has been a long-time volunteer coach for the Natick Comets Hockey Club, as well as serving as treasurer and board member of the club as well. He is a former treasurer and trustee of the Village School in Milton, Mass.

###

About TFC Financial

Founded in 1980, based in Boston, and majority-owned by our employees, TFC Financial operates as a wholly independent, fee-only financial advisory and investment management firm with revenues derived solely from the fees we charge for the services we provide. With more than $1.3B in client assets under management today, TFC, as a fiduciary, serves high-net-worth clients and multigenerational families, trustees, and non-profit organizations with a minimum of $2M of liquid investable assets. The firm provides comprehensive and strategic financial planning in addition to asset management services.