510 Meadowmont Village Circle
Suite 229
Chapel Hill, NC 27517
www.KehrerBielan.com

For Immediate Release:

Kehrer Bielan Announces Restructuring

Leading Research & Consulting Firm to Reorganize to Enhance Client Experience

CHAPEL HILL, NC JANUARY 25, 2023: Kenneth Kehrer and Peter Bielan, the partners behind industry-leading research and consulting firm Kehrer Bielan, announced today that the firm is being restructured to support the evolution of the business to better serve the changing needs of the industry.

Since 2014, Kehrer Bielan has provided the financial advice industry with insights based on a melding of research and experience in managing the delivery of investment, insurance, and wealth management services. In announcing the restructuring, Kehrer and Bielan pointed to the ways that the firm's clients stand to benefit.

"The restructuring will create space for each of the successor organizations to focus on their respective areas of specialization, allowing them to deliver an enhanced level of service to their clients and partners," commented Kehrer. "The bank and credit union financial advice industry will benefit from having access to companies that will collectively meet a broader set of needs, and be able to address them on a deeper level."

"Our decision to restructure is a reflection of our desire to bring more focus to our respective areas of expertise in order to best meet the demands of this evolving industry," commented Bielan. "The Kehrer Bielan team has done a fantastic job serving our clients and the industry, and I am very proud of that. To improve upon that record of service, this restructuring will enable the necessary investments to be made in a way that supports the unique opportunities each partner has in the marketplace."

The successor organizations to Kehrer Bielan will partner on joint work, events, and more to ensure continuity in its services and to provide the support its clients have come to expect.

One of the successor organizations, Kehrer Group, will continue to conduct the annual industry benchmarking survey, research studies, and provide the thought leadership long associated with Kenneth Kehrer, his longtime business partner Christine Kehrer, and the firms that have borne their name. Kehrer Group will also continue to host study groups of

industry leaders, and to produce the Annual Top Directors Awards. Kehrer Group will be led by Kenneth Kehrer and Tim Kehrer. Find out more at **kehrergroup.com**.

The Bielan Group, another successor organization, will focus on bringing together best-in-class resources to solve for the unique challenges faced by wealth management organizations. Peter Bielan will leverage his extensive experience as both a business leader and consultant to serve financial institutions and industry leaders. The Bielan Group will continue to develop strategic guidance and actionable recommendations, utilizing specialized partners, to help wealth leaders bring efficiency, sustainability, and growth to their businesses. Find out more at: **http://bielangroup.com/**

The final successor organization, Arthur Osman & Company, will continue to deliver business and organizational consulting services for financial institutions and wealth management firms and will expand the services to include leadership coaching and executive and advisory services. Financial services organizations and business leaders are thirsty for expertise, experience and help and Arthur is looking forward to tailoring his business to deliver on this expanded offering built around his unique skillsets and experience. Find out more at **www.arthurosman.com**.

For more information contact:

Tim Kehrer	Peter Bielan	Arthur Osman
Kehrer Group	The Bielan Group	Arthur Osman & Company
tim@kehrergroup.com	Peter@BielanGroup.com	arthur@arthurosman.com
609-712-2153	770-331-1280	704-906-9530