

## **Joss Brown Wealth Advisors Launches in Newport News, Williamsburg, and NOVA**

New firm is the merger of Joss Financial Group and The Advisory Firm of Katherine L Brown



**Williamsburg, Oct 4, 2020 ([IssueWire.com](http://IssueWire.com))** - Dan Joss and Katherine Brown have merged their financial planning firms and launched Joss Brown Wealth Advisors, with locations in Newport News, Williamsburg, and McLean, Virginia.

“By merging our firms, we believe strongly that we can do even more to change our world by helping clients find the freedom to develop purpose, live generously, bless others, and make a difference in their lives and the causes they love,” Joss said.

As a fee-only firm, Brown said, “our clients understand that they are the only source of our revenue. We don’t accept commissions or referral fees. Our primary goal is to help clients achieve their goals. We are true fiduciaries.”

The firm offers personal financial planning, investment management, non-profit and corporate portfolio solutions, retirement income planning, risk management, insurance planning, and tax-estate planning.

Originally from Seattle, Washington, Dan Joss is a graduate of the University of Southern California, where he studied Business Administration with an emphasis in Accounting and Finance. While serving in the U.S. Army, he earned a Master of Business Administration with emphasis in Financial Planning from Regent University. He holds Certified Financial Planner and Registered Life Planner designations. Joss is a NAPFA Registered Advisor.

“Pursue your priorities, purpose, and dreams. That is how you connect money to your life and values,” Joss said.

Originally from Silicon Valley in California, Katherine Brown has over 20 years of experience in the financial planning and investment field. She earned her Bachelor’s degree from Stanford University, and after being recruited into securities, Brown completed her post graduate certificate in Personal Financial Planning at UCLA. Katherine has been a fee-only NAPFA Registered Advisor for over 15 years.

Prior to financial planning, Katherine worked in real estate, mortgage lending, and insurance, and she holds life and annuities insurance licenses which allow her to consult on risk for her client’s estate planning needs, working hand-in-hand with their insurance agents and attorneys as part of the family professional team.

“It is important that I really listen to people, so that I know exactly where they are coming from in order to help them accomplish their goals,” she said. “Dan and I are both looking forward to teaming up to strengthen individuals and families in our communities with Joss Brown Wealth Advisors.”

*To learn more about Joss Brown Wealth Advisors, visit [www.jossbrown.com](http://www.jossbrown.com).*

**MEDIA INQUIRIES:** Contact Michelle A. Robinson at (757) 903-2121



## Media Contact

Joss Brown Wealth Advisors/ Michelle A. Robinson

info@jossbrown.com

(757) 903-2127

1321 Jamestown Road, Suite 104

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