

KOHMANN
BOSSHARD

PROVIDING INVESTMENT MANAGEMENT & FINANCIAL SERVICES SINCE 2005

WHAT SERVICES WE PROVIDE

Comprehensive, Intelligent, & Useful

INVESTMENT MANAGEMENT

Kohmann Bosshard provides professional investment management services, using low-cost, and tax-efficient strategies custom-tailored for

FINANCIAL PLANNING

We create and implement technical and comprehensive financial plans for retirement, estate and legacy goals, education saving, cash flow

EMPLOYER RETIREMENT PLANS

Kohmann Bosshard has extensive experience with being the advisor in a fiduciary capacity for retirement plans

individuals, families, trusts, corporations, and charitable entities.

planning, executive compensation packages, and much more.

such as 401(k) plans for a wide range of company sizes and industry sectors.

WHO WE ARE

Expertise, Experience, & Ethics



DEAN KOHMANN, CPA
President

Dean is the President of Kohmann Bosshard. He has worked in the financial services industry for 25 years, including 5 years as a CPA mostly at Ernst & Young, LLP; 14 years at Schwab Retirement Plan Services, and 4 years at ValMark Financial Group before joining Otto Bosshard and founding Kohmann Bosshard. He earned his Accounting



OTTO BOSSHARD, CFA
Former Chairman

Otto was the Chairman of Kohmann Bosshard. He was the former Vice President, Treasurer and Chief Investment Officer of Westfield Insurance Group, a former member of the Board of Directors at Westfield Bank and ValMark Financial Group, and former member of the Investment Committee of Summa Health System. He graduated from

degree from Case Western Reserve University. He has been married to Diana Kohmann since 1994 and has three wonderful daughters.



GREG MCDERMOTT
Advisor

Greg is an advisor with Kohmann Bosshard, specializing in advanced insurance planning. Greg has been in the financial services industry since 1981 including 12 years with two member offices of M Financial Group, 5 years as a Corporate Insurance Specialist with Executive Insurance Agency, and most recently 18 years with FirstMerit Bank, NA, holding the positions of Executive Vice President of Wealth Advisory, Retirement Services, Head of Trust and President of FirstMerit Insurance Group. He earned his degree in Business and Industrial Psychology from Miami University. He has been married to Jackie since 1981 and has a son Gordie and daughter Erin.

the University of Cincinnati before beginning his over 40 years in this industry. He is survived by his wife Claudia Bosshard of 54 years as well as his two sons and five grandchildren.



VICTORIA CONRAD, CFP®
Financial Planner

Victoria is a Financial Planner at Kohmann Bosshard. She joined KB in 2017. Victoria has worked in the financial services industry since 2007, including jobs with Charles Schwab and ValMark Financial Group. She earned her degree in Finance and Marketing from Ohio University and also holds the Certified Financial Planner™ designation. She has been married since 2015 and has one beautiful baby girl. Victoria enjoys rock climbing, mountain biking, and traveling with her family.



SHAWN VALCO, CFP®
Manager of Financial Planning &
Operations

Shawn is the Manager of Financial Planning & Operations at Kohmann Bosshard. He joined KB in 2015. Shawn has worked in the financial services industry for 8 years including positions with Scottrade and ValMark Financial Group. He earned his degree in Finance from the University of Akron and also holds the Certified Financial Planner™ designation. In his spare time, Shawn enjoys reading non-fiction and watching movies.



LAURA DELUCA
Client Services Specialist

Laura is the Client Services Specialist at Kohmann Bosshard. She has worked at the firm since 2010. Laura leverages her 15 years of experience in financial services, with previous employment at Vestax Securities and ValMark Financial Group. Laura enjoys traveling and spending time with her 2 sons and granddaughter.



MICHAEL MCCLARY

Consultant

Kohmann Bosshard employs Michael as a consultant and has worked with KB for over 10 years. Michael is currently the Chief Investment Officer of ValMark Advisers, Inc. and is directly responsible for managing over \$5 billion of assets. Michael has worked for ValMark since 2003 and earned his master's degree in Business Administration from the University of Akron. Michael has been married since 2007 to Jackie and they have one son, Parker.

WHERE WE ARE

130 Springside Drive, Suite 210
Akron, OH 44333





HOW TO CONTACT US

Office hours are currently by appointment only.

Feel free to reach out to us at 330-666-6886 for more information or to schedule an initial consultation.

You may also use this form to contact Kohmann Bosshard at your convenience. All fields are required to send.

SEND MESSAGE

USEFUL LINKS

[FINRA's BrokerCheck](#)

[CFP® Board Website](#)

[Registered Investment Advisor Disclosure](#)

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