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*For Immediate Release*

## **May Barnhard Investments Continues to Grow, Welcoming Two New Team Members and Expanding the Firm’s Client Service Capacities and Expertise**

**December 22, 2023 (Bethesda, MD)** – May Barnhard Investments (MBI), a Bethesda, MD-based fee-only wealth management firm and a subsidiary of Councilor, Buchanan & Mitchell (CBM), expanded its client service capacities and expertise by welcoming Stephanie Anderson, CFA, CFP®, CDFA®, a wealth manager with more than 30 years of experience in the investment management and strategy consulting industries, and Lisa Sippel, a manager with more than 20 years of operations management and accounting experience. Anderson and Sippel represent the newest team members to join MBI following the addition of senior portfolio and relationship manager Gregory Estes earlier this fall.

“I am thrilled to welcome Stephanie and Lisa to the MBI team,” said Judith P. Barnhard, CPA, CFP®, CDFA®, co-founder and chief compliance officer of MBI. “As our wealth management team expands, we develop a multi-dimensional service approach that should immediately benefit our clients and their experience working with our team.”

Anderson has considerable experience working with individuals, couples and families to manage their finances in a comprehensive, holistic manner throughout their lives—from marriage, starting a family, planning for taxes, preparing for retirement, and estate advisory/legacy planning. She recently expanded her focus to assist individuals who are contemplating or engaged in a divorce. In addition to her expertise in financial planning for families, Anderson has worked extensively with institutional clients (especially endowments and foundations) and their boards and investment committees to develop investment policy statements that guide the management and oversight of their portfolios. Further, she has honed her analytical and creative problem-solving skills during numerous engagements as a strategy consultant.

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Sippel has more than 18 years of experience at CBM, working most recently as an accounting manager while serving a variety of operational roles throughout the firm. Following a short stint at a DC-area law firm, she returns as MBI's operations manager, a role in which she will be responsible for ensuring a seamless client experience at MBI by providing timely and personalized responses to meet their needs.

"I look forward to this opportunity," said Anderson. "The MBI team has developed a trusted reputation for providing outstanding investment advisory and wealth management expertise, and I am excited at the prospect of collaborating with clients to help them attain their goals."

MBI, founded in 2013 and originally owned by Barnhard, and partners Debora E. May and Jeffrey A. May, has served high net worth clients throughout the Washington, DC metropolitan region and nationally since 1991. The firm merged into CBM in 2017 following a strategic decision to provide clients with access to an additional level of tax and advisory expertise.

### **ABOUT MAY BARNHARD INVESTMENTS**

May Barnhard Investments, LLC (MBI) is a fee-only wealth management advisory firm. A subsidiary of Councilor, Buchanan & Mitchell, MBI delivers expertise in investment management, financial planning, tax planning, retirement planning, estate planning, education planning, charitable giving, risk management, cash flow management and debt flow management. MBI works with individuals, including those experiencing divorce, widows and widowers, business owners and executives.

### **ABOUT COUNCILOR, BUCHANAN & MITCHELL**

Councilor, Buchanan & Mitchell, a full-service tax, accounting and advisory business, has provided professional services to clients in the Washington, DC area and throughout the Mid-Atlantic region since 1921.