

JULIE L. BESSENT, CPA, CFP®, CFA

Ms. Bessent has over 25 years of experience and success in the financial services industry. In 2001 she founded and continues to serve as President of Evergreen Advisers, a multi-family office serving three generations of families. Her firm provides a comprehensive suite of services including investment management oversight, tax strategy and services and personal financial planning. Ms. Bessent works closely with other members of the investment committees to develop, implement and monitor the investment management strategy and process. Her leadership and collaborative approach with family members and external advisors provides customized and successful tax and cash flow planning, risk management, estate/family wealth planning, business advisory and philanthropy services for the clients.

Ms. Bessent received a Bachelor of Business Administration, Banking and Finance from University of North Florida and Master of Science, Accounting from Oklahoma State University. She is on the Board of the CFA Society Jacksonville and an active member of the Florida Institute of CPAs as well as, the Northeast Florida Financial Planning Association.

Raised in Jacksonville and currently residing in Atlantic Beach, Ms. Bessent continues to give back to her community. She was a member of Springboard Foundation, a collective giving organization that supports small, underfunded grassroots after-school programs and on the Board of Reading in Motion, a NFP that provides foundational reading skills to kindergarten and first grade students. Currently, she is on the Education Committee of the Women's Giving Alliance, a collective giving initiative for woman and girls in NE Florida.