Short Intro Bio

Kyle Bochat is a Certified Private Wealth Advisor® and the founder of Financial Potential Wealth Management, a faith-driven firm helping high-net-worth individuals align their finances with their faith. With over a decade of experience, Kyle brings a unique blend of spiritual conviction and financial expertise to the table—empowering believers to manage their God-given wealth with peace, purpose, and eternal impact. He is also the creator and teacher behind Faith & Finances, a discipleship- based workshop series equipping Christians to steward their resources biblically. Whether guiding clients through custom wealth strategies or leading legacy planning retreats, Kyle is passionate about transforming wealth into a tool for Kingdom-building.

kyle.bochat@financialpwm.com
www.yourfinancialpotentional.com
www.financialdiscipleship.com

Professional Bio

KYLE BOCHAT

Full Intro Bio

Kyle Bochat is a Certified Private Wealth Advisor® (Yale, 2022) and the founder of **Financial Potential Wealth Management**, a faith-driven financial firm serving high-net-worth clients who want their wealth to reflect their values. After more than a decade in traditional and independent wealth management—including time with Edward Jones, Wells Fargo, and as a co-start-up advisor of the Strong Gaddy Lee firm—Kyle felt a divine nudge to rebuild his practice from the ground up, fully aligned with biblical stewardship and Kingdom impact.

In 2024, he launched Financial Potential not as a rebrand, but a rebirth. His mission: to help believers manage their God-given wealth with clarity, peace, and eternal purpose.

Kyle holds several advanced certifications, including CPWA® and CEPA®, and completed the Christian Theology of Investing Certificate through Eventide's Center for Faith and Investing (2024). He is also an upcoming certified Legacy Stone Facilitator (Fall 2025), equipping him to lead high-touch, multigenerational legacy planning for family offices and impact-driven families.

Kyle teaches **Rich Legacy** through **Financial Discipleship**, an immersive learning experience rooted in biblical wisdom. His classes, retreats, and webinar teachings guide Christians toward faithful financial decision-making—integrating spiritual conviction with practical strategy.

Kyle offers two signature pathways designed to help clients align their wealth with wisdom and purpose. The **Living Legacy Pathway** is a general asset management experience for believers seeking biblically grounded planning and ongoing support. The **Legacy Partner Pathway** offers a concierge-style engagement for clients seeking deeper partnership, multi-generational planning, and high-touch support with custom deliverables.

Financial Potential Wealth Management combines timeless biblical wisdom with cutting-edge financial technology to serve clients with excellence. From impact screening to tax strategy, clients gain access to modern solutions while working with a team that shares their convictions. The firm is also growing intentionally—attracting top-tier, aligned talent who want their work to matter for eternity as much as the bottom line.

Kyle also hosts a **private podcast called RICH**—a behind-the-scenes teaching tool that helps clients grow in confidence, clarity, and conviction. The episodes explore biblical frameworks, financial insight, and the deeper spiritual journey of wealth stewardship.

Kyle's personal story includes early entrepreneurship, corporate wins, sudden setbacks, and a courageous recommitment to his calling. He brings that resilience and perspective into every client conversation.

He lives in Northeast Georgia with his wife, Erin, and their three daughters and two son-in-laws. When he's not guiding clients or teaching, you'll find him sailing (he's an ASA Certified Sailor), playing golf, pickleball or deepening his walk with the Lord. His greatest joy is helping others steward their resources well and leave a legacy that honors God.

Notable Accomplishments in Teaching, Strategy & Certification

Certified Private Wealth Advisor® (CPWA) –
Yale School of Management, 2022
An advanced credential held by less than 1% of advisors; equips Kyle to serve high-net-worth and ultra-high-net-worth clients with holistic, sophisticated planning.

Certified Exit Planning Advisor® (CEPA) –
Exit Planning Institute, 2020
Helps entrepreneurs navigate transition and legacy; earned during COVID to better understand how to serve business owners and their "most prized asset—their business."

Christian Theology of Investing Certificate –
Eventide's Center for Faith & Investing
Described by Kyle as "seminary for your financial life," this immersive theology course laid the biblical foundation for his transition to faith-driven advising.

Legacy Stone Facilitator –
Expected Completion, Fall 2025
Selected as 1 of 6 advisors nationwide to be trained by Bill High's team in multi-generational legacy planning for family offices and Kingdom-minded families.

Founder of Financial Potential Wealth Management (2024–present)
A faith-driven advisory firm helping affluent believers align their wealth with their values. Launched after stepping away from a successful independent firm to obey a divine nudge toward integration of faith and finance.

> ***"We don't just manage assets.***
> *We disciple clients toward a richer definition of success–one where biblical values, family legacy, and Kingdom impact are built into every financial decision."*

Creator & Teacher of Financial Discipleship
Teaches immersive workshops, customized retreats, and on-demand curriculum helping believers manage their finances with biblical wisdom and Kingdom purpose.

JOIN THE WAITLIST ⟵ COMING SOON

Former Start-up Advisor of Strong Gaddy Lee Wealth Management
Co-built and scaled a successful independent wealth management firm serving high-net-worth families in North Georgia from 2016 to 2023.

First taught Faith & Finances in 2025
at The Center for Inspired Performance
Developed curriculum and introduced his discipleship-based framework for biblical money management to a community of entrepreneurs and ministry leaders.

Speaking, Teaching & Content

Faith & Finances Class Teacher –
The Center for Inspired Performance (2025)
www.inspiredperformance.org/classes

Facilitator –
Faith Driven Investor Foundations Group
A 6-week guided program run by the Faith Driven Investor movement, designed to connect and equip Christ-following investors with resources, community, and connections to align their investments with their faith.

Featured on Podcast with Robert Mallon
Discussed resilience, door-to-door client-building, and the conviction behind launching a faith-driven firm.

Featured on Business Radio X Podcast with Phil Bonelli
Shared his approach to building personalized investment strategies by first understanding each client's goals—then crafting tax-efficient, wealth-building plans that preserve assets and support long-term success.

Featured on Remarkable Radio with Mark Imperial
Discussed strategic exit planning for business owners and how to approach transitions with clarity and stewardship.

Upcoming Facilitator – Legacy Planning Workshop with Bill High (Fall 2025)
Leading high-touch family legacy workshops for affluent believers, equipping them to leave a legacy that lasts for the generations.

Founder, Financial Discipleship Community
Actively creating values-aligned content, frameworks, and tools for Christian stewards.

Host of RICH

A private podcast for clients and aligned listeners. Designed to cultivate confidence, clarity, and conviction around biblical wealth stewardship, this invite-only podcast offers practical insight, spiritual depth, and behind-the-scenes teachings on legacy, investing, and calling.

Teaches workshops and retreats on:

Biblical financial discipleship & the ways of a "True Steward"

Kingdom legacy and multigenerational wealth

Redemptive financial decision-making

Faith-driven business transition & investing

Get On the Waitlist

Coming in 2026

Unique Distinctions

Launched his career with Edward Jones,
earning the firm's top new advisor award for onboarding 100 clients in year one.

Experienced corporate and independent models:
Wells Fargo, Strong Gaddy Lee, and now founder of his own independent firm.

Personal story of faith, risk, and rebuilding
from the ground up after a high-income "Purple Patch" season ended abruptly—shifting his identity and mission toward eternal purpose.

Homeschooled entrepreneur from age 14,
DJing weddings and helping operate his family's skating rink business before age 18.

ASA Certified Sailor
and active member of Chestnut Mountain Church in Georgia.

Husband to Erin, father to three daughters and two son-in-laws,
and committed to building a legacy that honors God across generations.

Saved at age 5,
Kyle grew up in Helen Baptist Church's youth group and married his high school sweetheart at 18 years old—marking the beginning of a life rooted in faith, family, and service.

Download The Bochat Family Living Legacy Story

Ministry & Community Leadership

Board Leadership:
Former nonprofit board member for United Way, Boys & Girls Club, and The Guest House Senior Care. Currently serves on the board of Light Work Ministries in Northeast Georgia—a ministry giving second chances to incarcerated youth and helping equip, disciple, and employ convicted felons, offering hope and direction for a better tomorrow.

Church Involvement:
Actively serves on the Stewardship Committee and Finance Team at Chestnut Mountain Church.

Journey of Generosity Facilitator:
Volunteer with Generous Giving, co-hosting JOG experiences with his wife Erin. Together, the Bochats lead groups through immersive storytelling and powerful generosity content designed to spark joyful generosity among their community.

Generosity Atlanta Committee Member:
Supports a movement of like-minded generosity leaders stirring up Gospel-centered giving in Georgia through events, awareness campaigns, fundraising, and community engagement.

Kyle Bochat Is Available For:

Kyle is available for podcast guesting, speaking engagements, discipleship teaching, and consulting for faith-driven investors, advisors, and family offices.

Speaking & Teaching

Keynote sessions at faith-driven conferences and retreats

Guest teaching at churches, discipleship schools, or marketplace ministries

Breakout sessions and panels on biblical wealth, legacy, and Kingdom impact

In-person or virtual workshops on financial discipleship - The ways of a "True Steward"

Christian business or men's leadership events

Financial wellness seminars for Christian entrepreneurs and organizations

Podcast Guesting

Interviews on faith + finance, legacy planning, and Kingdom wealth

Guest appearances for financial podcasts, advisor networks, and business shows

Behind-the-scenes discussions on obedience, calling, and starting over

Personal testimony and spiritual transformation stories

How to go "all in" with your faith in the marketplace.

Consulting & Advisor Coaching

Consulting with Christian financial advisors and RIAs on faith-driven firm structure

Setup a Consultation with Kyle

Strategic workshops for firms integrating Biblically Responsible Investing (BRI)

Private consulting for family offices on multi-generational stewardship

Collaborations with churches and non-profits on donor education or legacy strategy

Content Collaboration & Thought Leadership

Guest writing or content partnerships (email series, devotional plans, blogs)

Video teaching series or summit interviews

Panel contributions on faith-based investment movements

Co-hosting workshops or retreats with aligned ministries

To inquire about booking, collaboration, or consulting, visit
www.yourfinancialpotential.com

EST. 2023 FINANCIAL POTENTIAL WEALTH MANAGEMENT — STRATEGIC WEALTH MANAGEMENT WITH PURPOSE