Wealth Management

Toledo Area
Leading Registered Financial Advisors

Leading Registered Financial Advisors is a resource being provided to Toledo Business Journal *and* Development New *readers.*

We have worked to indentify financial advisors in our area with the highest levels of assets under management (AUM). At this current stage, financial advisors are included from a geographical area with a radius of approximately 35 miles around Toledo. We are interested in expanding this geography with time.*

Information from public records filings, third party industry sources, and area financial advisory firms has been used in this effort.

We are continuing to learn about registered financial advisors that may qualify for inclusion who have high levels of assets under management. We seek information from area professionals that will assist these efforts.

* AUM is reached by investment advisory assets or brokerage assets or both combined, confirmed through individual advisors and firm representatives.

Financial Advisory Firms

Alan B. Lancz & Associates, Inc.
Toledo

Ameriprise Financial Services, Inc.
Toledo, Bowling Green

Ameritas Investment Corp.
Perrysburg

Berthel, Fisher & Company Financial Services, Inc.
Toledo

Bollin Wealth Management, LLC
Perrysburg

Camelot Portfolios, LLC
Maumee

Capital Management Strategies LLC
Toledo

Cetera Advisors LLC
Toledo

Citizen Advisory Group
Perrysburg

Citizens Securities
Toledo

Citizens Wealth Management Group
Bluffton, Bowling Green

Creative Financial Partners
Perrysburg

Croghan Trust & Investment Services
Fremont, Maumee

Edward Jones
Multiple Offices

Equity Planning Group
Toledo

Evans, Beebe & Fields Financial Group
Maumee

Fifth Third Private Bank
Toledo

First Federal Bank Wealth Management
Multiple Offices

Fourth Dimension Financial Group
Perrysburg

Gant Investment Advisors, Inc.
Toledo

Hantz Financial Services, Inc.
Maumee

Harwood Investment Strategies, LLC
Monroe

Heritage Financial Advisors, LLC
Waterville

Indicator Advisory Corp.,
Toledo

Informative Financial Services
Toledo

Isabell Financial Services
Toledo

Kersten Wealth Management Group
Perrysburg

Lincoln Financial Advisors Corporation
Toledo

LPL Financial LLC
Toledo

MassMutual Ohio
Maumee

McDonald Partners LLC
Maumee

Merrill Lynch
Toledo, Perrysburg

Morgan Stanley Wealth Management
Toledo

MPM Wealth Advisors, Inc.
Holland

Northwestern Mutual
Toledo

NYLIFE Securities LLC
Maumee

Wealth Management

OBS Financial
Whitehouse

Parlan Financial Corp
Toledo

PNC Investments, LLC
Toledo

Premier Wealth Management Group
Toledo

Private Wealth Consultants Ltd
Toledo

Raymond James Financial Services
Multiple Offices

Rehmann Financial
Toledo

Ressourcement, Inc.
Perrysburg

Savage & Associates, Inc.
Toledo, Bowling Green, Findlay

SII Investments, Inc.
Monroe

State Bank,
Defiance, Findlay

Strategic Investment Advisors
Sylvania

Structured Wealth Management, Inc.
Toledo

TDC Investment Advisory Services
Maumee

The Huntington Investment Company
Grand Rapids

The Mutual Fund Store
Maumee

The Retirement Guys
Maumee

The Trust Company
Findlay, Toledo

Treece Investment Advisory Corp
Toledo

UBS Financial Services Inc.
Sylvania

UFirst Financial / J.W. Cole Financial, Inc.
Maumee

United Advisors
Maumee

Voya Financial
Toledo

Wells Fargo Advisors Financial Network
Maumee

Wells Fargo Advisors LLC
Toledo, Perrysburg

Leading Area Registered Financial Advisors

Paul Abendroth
Rehmann Financial

Sandy Adam
Merrill Lynch

Anthony Thomas Adamshick
Merrill Lynch

Christopher Thomas Anteau
Citizen Securities

James Michael Aubry
Wells Fargo Advisors LLC

Thomas A. Baither
LPSB Wealth Management Group / UBS

Nolan Baker
The Retirement Guys

Jeffrey Charles Barefoot
Ressourcement, Inc.

Larry E. Beebe
Evans, Beebe & Fields Financial Group

David Bell,
State Bank

C. Robert Bennett
Wells Fargo Advisors Financial Network

David Bodner, ChFC, CLU
MassMutual Ohio

Donna Bogan
Lincoln Financial Advisors Corporation

Richard Todd Bohn
Raymond James Financial Services

Brian Boisselle
Citizens Wealth Management Group

Deborah S. Boisselle
Citizens Wealth Management Group

Thomas Gerard Briggs
Raymond James Financial Services

Scott Brown
Morgan Stanley Wealth Management

Scott Matthew Brown
Edward Jones

Christopher Basil Brzuchalski
PNC Investments, LLC

Jeff Bucher
Citizen Advisory Group

Kevin Bucher, RICP
Citizen Advisory Group

Shawn Michael Burke
Wells Fargo Advisors LLC

Robert James Buschur
Wells Fargo Advisors LLC

Mark Clair
The Retirement Guys

David Clarke
MassMutual Ohio

Kevin J. Clingaman
Huntington Investment Company

Rick L. Cocke
UBS Financial Services Inc.

Robert W. Constien, CTFA
Croghan Trust & Investment Services

Michael Raymond Creps
Merrill Lynch

Timothy Robert Croak
Ameritas Investment Corp.

G. Thomas Damasco
MPM Wealth Advisors, Inc.

Mark Alan Darah
Merrill Lynch

Matthew Darrah
Merrill Lynch

Ryan Dauterman
Savage & Associates

Steven DeYarman
Huntington - Private Client Group

Bradford G Dolgin
UBS Financial Services Inc.

Mic Donahue
Merrill Lynch

Michael William Eberly
Wells Fargo Advisors LLC

Chris Egli
First Federal Bank Wealth Management

Jason Elchert
Savage & Associates

Earl B. Emery
Cetera Advisors LLC

Wealth Management

Shane Ewbank, CRPC®, CRPS®
Merrill Lynch

Alan Fadel
Morgan Stanley Wealth Management

Craig Douglas Findley
Findley Wise Wealth Management / UBS

Michael Ray Foster
Wells Fargo Advisors LLC

William Robert Foster
Wells Fargo Advisors LLC

Rob Fox
Morgan Stanley Wealth Management

Brian Funkhouser
Findley Wise Wealth Management / UBS

Thomas J. Gagnet
UBS Financial Services Inc.

Neil C. Garrison
Garrison Financial LLC,
Raymond James Financial Services

Nathan David Geisler
Merrill Lynch

Troy A. Greeley
Wells Fargo Advisors LLC

Wendy Lamberg Greeley
Merrill Lynch

Richard I. Green
UBS Financial Services Inc.

Kathleen Anita Hamburger
Wells Fargo Advisors LLC

James Carl Happ
Merrill Lynch

Ann Hartmann
Lincoln Financial Advisors Corporation

John Henry
OBS Financial

Mark Hetrick
Wells Fargo Advisors LLC

David Himich
Morgan Stanley Wealth Management

David Richard Hollinger
Wells Fargo Advisors LLC

Holly Hollister
Savage & Associates

Charles Ide
Morgan Stanley Wealth Management

Dennis Isabell
Isabell Financial Services

Holly Christine Jensen
Wells Fargo Advisors Financial Network

Joseph (Bob) Jesionowski
Wells Fargo Advisors LLC

Philip Johnson
Savage & Associates

Marcus William Jones
Wells Fargo Advisors LLC

Craig Joseph
Equity Planning Group

Katherine Joslin
Merrill Lynch

Russell A Karban
Savage & Associates

David Kaser
Morgan Stanley Wealth Management

Rick Kaser
Morgan Stanley Wealth Management

Merel Keck
Wells Fargo Advisors LLC

Ryan Phillip Kelley
The Retirement Group LPL

Mike Kelso
Croghan Trust & Investment Services

Brad Kersten
Kersten Wealth Management Group/
LPL Financial LLC

Brett R. Kinzel
UBS Financial Services Inc.

Mark Klopfenstein
Strategic Investment Advisors

Larry Gene Klotz
Larry Klotz LLC, LPL Financial

John Kolbeck
Huntington - Private Client Group

Craig Kuhlman,
State Bank

Crystal K. Lagger
Wells Fargo Advisors LLC

Alan Lancz
Alan B. Lancz & Associates, Inc.

Jeffrey Peter Levesque
Merrill Lynch

Robert S. Loeb
LPSB Wealth Management Group / UBS

Barry F. Luse
Croghan Trust & Investment Services

Joseph Majdalani
Merrill Lynch

Monica Malhoit
UBS Financial Services

Rita Mansour
McDonald Partners LLC

Lesia L. Marino-Brolinson
Merrill Lynch

John Mayer
Morgan Stanley Wealth Management

Stephen Mayor
Morgan Stanley Wealth Management

Devon Frances McArdle
McDonald Partners LLC

Michael McCullogh
Morgan Stanley Wealth Management

Sean Joseph Mcghee
Berthel, Fisher & Company
Financial Services, Inc.

Daniel Michael McHugh
Merrill Lynch

Aaron Mechling
Morgan Stanley Wealth Management

Philip Alan Mendel
Morgan Stanley Wealth Management

Douglas S. Miller
Private Wealth Consultants Ltd

Patrick John Mollenkamp
Merrill Lynch

Darren T Munn
Camelot Portfolios, LLC

Patrick R. Murray
Murray/Allen/Hafner Group / UBS

Philip Noble
Morgan Stanley Wealth Management

Miles Joseph O'Mailia
Merrill Lynch

Lee W. Odegaard
Edward Jones

Duane C. Ohly
UBS Financial Services Inc.

Bryan Ohm
MPM Wealth Advisors, Inc.

Wealth Management

Paul D Olsen
Wells Fargo Advisors LLC

John Michael Ostrosky
UFirst Financial / J.W. Cole Financial, Inc.

David S. Patton
Merrill Lynch

Christopher Pierce Pharis
Merrill Lynch

Peter Weist Pharis
Merrill Lynch

Michael Anthony Pizza
Wells Fargo Advisors LLC

James J. Porea
LPSB Wealth Management Group / UBS

Allan Michael Poturalski
Morgan Stanley Wealth Management

Chaz Price
Garrison Financial LLC,
Raymond James Financial Services

Jim Prisby
Morgan Stanley Wealth Management

David Quinn
Wells Fargo Advisors LLC

Jane Marie Rahe, MBA
Fifth Third Private Bank

Gary Rathbun
Private Wealth Consultants Ltd

Douglas James Rechtine
Premier Wealth Management Group

Stanley Clyde Riggs
Merrill Lynch

Deborah Ann Robinson
Edward Jones

Joshua Rochon, CFP®
Fifth Third Private Bank

Cynthia S. Roepke, CFP®, CAP®
Fifth Third Securities, Inc.

Edward L. Roth
Raymond James Financial Services

Kevin Alan Rubin
Merrill Lynch

Joel Rupp
Morgan Stanley Wealth Management

James P. Sampson
UBS Financial Services Inc.

M Ann Sanford
Morgan Stanley Wealth Management

Charlotte Sargeant
Heritage Financial Advisors, LLC

Michael Sassaman
Capital Management Strategies LLC.

Kelly Savage
Savage & Associates

Sean Savage
Savage & Associates

Jennifer Scroggs
First Federal Bank Wealth Management

Kevin Paul Seegert
SII Investments, Inc.

Dale Seymour
MassMutual Ohio

Gregory Ellis Shemas
Raymond James Financial Services

Matthew Skotynsky
Raymond James Financial Services

Gary Sliemers
Wells Fargo Advisors LLC

Mark Smigelski
Savage & Associates

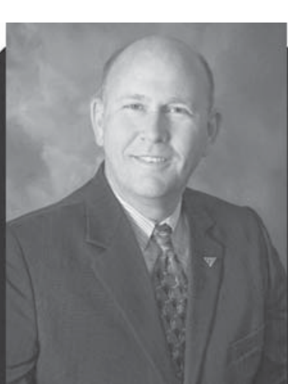
Ryan Smith
Merrill Lynch

David Robert Snell
Merrill Lynch

Drew Snell
Merrill Lynch

Nona Snell
Merrill Lynch

(…continued on page 20)



WEALTH MANAGEMENT

…Continued from page 15

John D. Spengler
LPSB Wealth Management Group / UBS

Carey Stansbury
Informative Financial Services

Sherri Stansbury
Informative Financial Services

Daniel N. Steinberg
Royal Alliance Associates, Inc.

William James Stevens
Merrill Lynch

Spence Stone
Morgan Stanley Wealth Management

Stephen Fredericks Sutherland
Wells Fargo Advisors LLC

Craig Thistlethwaite
Morgan Stanley Wealth Management

Robert M. Thompson
Merrill Lynch

Stephen S. Trudel
Edward Jones

Joel Tschantz
Savage & Associates

Chris Tucker
Morgan Stanley Wealth Management

Jeff Turner
Savage & Associates

Brad Tyo
Morgan Stanley Wealth Management

William Todd Wagoner
Ameriprise Financial Services, Inc.

Christopher Otto Walker
Ameriprise Financial Services, Inc.

Paul Wannemacher, CPA, PFS, CFP
Croghan Trust & Investment Services

John Robert Weinert
Wells Fargo Advisors LLC

Glenn Weisner
Merrill Lynch

Fred Case White
Wells Fargo Advisors LLC

David Williams
Merrill Lynch

Deborah Williams
Morgan Stanley Wealth Management

Gary Wise
MassMutual Ohio

Kenneth Wise
Findley Wise Wealth Management / UBS

Sasha Wright
Heritage Financial Advisors, LLC

Kent Wyse
MassMutual Ohio

Shari Wyse
First Federal Bank Wealth Management

Richard Youssef
Voya Financial Advisors, Inc.

Borgers

…Continued from page 6

According to Borgers president and CEO Werner Borgers, a number of major factors impacted the company's decision to locate in northwest Ohio. Norwalk's location and its logistics benefits for both customers and suppliers was a critical factor in Borgers' decision. In addition, the skill and work ethic of the labor force in Norwalk and northwest Ohio played an important factor in the selection of the site for this new manufacturing facility.

"Norwalk is a great location regarding logistics as it relates to our Midwest customers and the labor force is exceptional and highly motivated," said Borgers. "In addition to that, we feel that there is a great emotional fit between the people in Norwalk and the values and characteristics of our family business."