

WEALTH MANAGEMENT

TOLEDO AREA LEADING FINANCIAL ADVISORS

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

We have worked to identify 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.*

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Although many professionals may call themselves "financial planners", CFP® professionals have completed extensive training and experience requirements and are held to rigorous ethical standards. They understand all the complexities of the changing financial climate and will make recommendations in the consumer's best interest.

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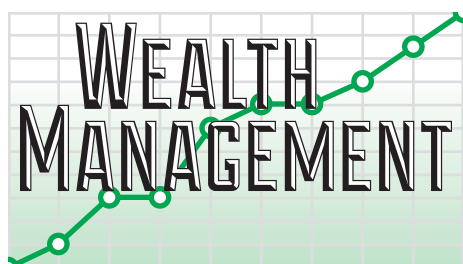
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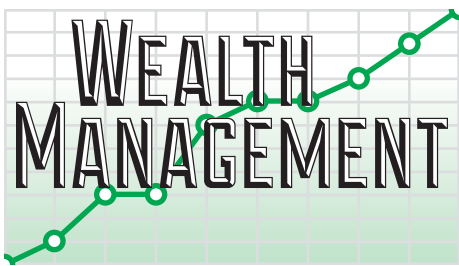
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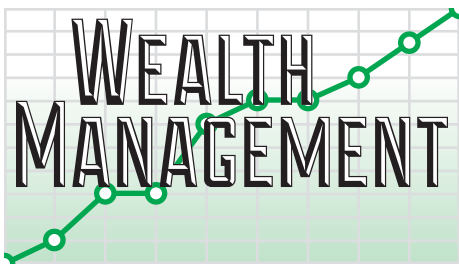
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If you would like this opportunity to possibly be published ~ please send your case study to editor@toledobiz.com.

Submissions need to be 500-700 words (ideally); images, graphs, etc. are welcome and optional. Please provide a high-resolution photo (of you) with your name and company name as you would like it listed. (Photo is not required.)

The case study should be a true event, but reviewed with our staff if there is need to be disguised.

There is no charge to submit or be published. Case studies will be randomly and occasionally published at our discretion; there is no guarantee which submissions will be selected to run. Case scenarios chosen to be published will be in our print edition and online at our discretion.

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EPILOGUE

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