

WEALTH MANAGEMENT

Leading 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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Its time to review your records and file your annual report of unclaimed funds for 2019!

Due Dates
Non-Life Insurance:
Nov. 1, 2019
Life Insurance:
May 1, 2020

Reports can be filed electronically or mailed to the Ohio Business Gateway

Not holding any unclaimed funds? A Negative (NONE) Report is still required

For more information, visit: com.ohio.gov/unfd



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