

# 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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### Attention Ohio Businesses

Its time to review your records and file your annual report of unclaimed funds for 2020!

**Due Date  
Non-Life  
Insurance:  
Nov. 1, 2020**

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

Not holding any unclaimed funds? We encourage all NONE reports to be filed through Ohio Business Gateway

If you have concerns about meeting the deadline, you may request an automatic extension by visiting <https://apps2.com.ohio.gov/unfd/extension/>

For more information, visit: [com.ohio.gov/unfd](https://com.ohio.gov/unfd)



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Are you asking enough questions about the way your wealth is managed?



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In life, you question everything. The same should be true when it comes to managing your wealth. Do you know what your broker is basing their recommendations on? Do they stand by their word? Do you know how much you're paying in fees? And how those fees affect your returns? Ask your broker, and if you don't like their answers, ask again at Schwab. We think you'll like what our Financial Consultants have to say.

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