

# WEALTH MANAGEMENT

## TOLEDO AREA LEADING REGISTERED 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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