WEALTH MANAGEMENT

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

Toledo Area Leading Financial Advisors

Financial Advisory Firms

Alan B. Lancz & Associates, Inc.
Toledo

Ameriprise Financial Services, Inc.
Multiple locations

Ameritas Investment Corp.
Perrysburg

Baird
Maumee

Berthel, Fisher & Co. Financial Services, Inc.
Toledo

Bollin Wealth Management, LLC
Perrysburg

Camelot Portfolios, LLC
Maumee

Capital Management Strategies, LLC
Toledo

Cetera Advisors, LLC
Toledo

Charles Schwab
Perrysburg

Citizen Advisory Group
Perrysburg

Citizens Securities
Toledo

Citizens Wealth Management Group
Bluffton, Bowling Green, Toledo

CLA
Toledo

Creative Financial Partners
Perrysburg

Croak Asset Management
Toledo

Croghan Trust & Investment Services
Fremont, Maumee

Edward Jones
Multiple Offices

Equity Planning Group
Toledo

Farmers & Merchants Investment Services
Multiple Offices

Fidelity Investments
Ann Arbor

Fifth Third Private Bank
Toledo

Fourth Dimension Financial Group
Perrysburg

Garrison Financial, LLC
Toledo

Glass City Federal Financial Solutions
Maumee, Toledo, Bowling Green

Hantz Financial Services, Inc.
Maumee

Hartmann & Associates
Toledo

Heritage Financial Advisors, LLC
Waterville

Huntington Financial Advisors
Toledo, Perrysburg, Rossford

Indicator Advisory Corp.
Toledo

Informative Financial Services
Toledo

Kersten Wealth Management Group
Perrysburg

KMG Fiduciary Partners, LLC
Toledo

Lehner Carroll Shope Capital Management
Perrysburg

McDonald Partners, LLC
Toledo, Ann Arbor

Merrill Lynch
Multiple Offices

Munn Wealth Management
Maumee

Patton Wealth Management
Maumee

PNC Wealth Management
Toledo

Premier Wealth
(Formerly First Federal Bank Wealth Mgmt.)
Multiple Offices

Premier Wealth Management Group
Toledo

Wealth Management

Prospera Financial Services
Maumee

Raymond James Financial Services
Multiple Offices

Rehmann Financial
Toledo

Retirement Group, LPL
Toledo

Retirement Guys Formula, LLC
Maumee

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

Seegert & Seegert Financial Advisors
Monroe

Sieple Financial, Inc.
Toledo

Skotynsky Financial Group, LLC
Perrysburg

Skylight Financial Group
Toledo, Sylvania

Standing Firm Financial
Bowling Green

State Bank
Toledo, Defiance, Findlay

Strategic Investment Advisors
Sylvania

Summit Wealth Management Group / UBS
Sylvania

TDC Investment Advisory
Maumee

The Ashley Group
Maumee, Sandusky

Touchstone Wealth Partners / UBS
Sylvania

Transamerica Financial Advisors
Maumee

Treece Investment Advisory Corp.
Toledo

UBS Financial Services, Inc.
Sylvania, Sandusky

Vantage Financial Group
Toledo

Venture Visionary Partners
Toledo

Voya Financial Advisors, Inc.
Toledo

Wells Fargo Advisors, LLC
Multiple Offices

Leading Area Financial Advisors / Certified Financial Planners®

Paul Abendroth, AIF®
Venture Visionary Partners

Sandra M. Adam, CFP®, CRPC®
Merrill Lynch

Anthony Thomas Adamshick
Merrill Lynch

Christopher Thomas Anteau
Berthel, Fisher & Co. Financial Services, Inc.

James Michael Aubry
Wells Fargo Advisors, LLC

Nolan Baker
Retirement Guys Formula, LLC

Beau Barrow, CFP®
Glass City Federal Financial Solutions

Charles Robert Bennett
Prospera Financial Services

David Bodner, ChFC®, CLU®, CLTC®
Skylight Financial Group

Donna Bogan, CLU®, ChFC®, CRPC®
Hartmann & Associates

Richard Todd Bohn
Raymond James Financial Services

William Bohney
Farmers & Merchants Investment Services

Brian Boisselle, LPL®
Citizens Wealth Management Group

Deborah S. Boisselle, LPL®
Citizens Wealth Management Group

Phillip Bollin, CFP®
Bollin Wealth Management, LLC

Ryan Borucki, CFP®
Venture Visionary Partners

Thomas Gerard Briggs
Raymond James Financial Services

Scott Matthew Brown, CFP®, AAMS®
Edward Jones

Jeff Bucher
Citizen Advisory Group

Kevin Bucher, RICP®
Citizen Advisory Group

Michael Buganski
Skylight Financial Group

Lindsay Buker, CFP®
Skotynsky Financial Group, LLC

Robert James Buschur
Wells Fargo Advisors, LLC

John Campbell, CLU®, ChFC®, CFP®, AIF®
Savage and Associates, Inc.

Beth Carr
Premier Wealth

Mark Clair
Retirement Guys Formula, LLC

David Clarke, CLU®, ChFC®, CFBS®
Skylight Financial Group

Kevin J. Clingaman
Huntington Financial Advisors

Rick L. Cocke
Summit Wealth Management Group / UBS

Theresa Cooper
Patton Wealth Management

Michael Raymond Creps
Merrill Lynch

Timothy Robert Croak
Croak Asset Management

Eric Croak, CFP®
Croak Asset Management

Matthew Darah, CPFA®
Merrill Lynch

Bruce Deboer, CLU®, ChFC®, CLTC®
Skylight Financial Group

Cleves R. Delp, ChFC®
TDC Investment Advisory

Matthew Detrick, ChFC®, CRPC®
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Bradford G. Dolgin
Venture Visionary Partners

Michael Donahue, AAMS®, CRPC®, CPFA®
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Eric Donofrio, CFP®
PNC Wealth Management

Jason Elchert
Savage and Associates, Inc.

Earl B. Emery, CFP®
Cetera Advisors, LLC

Melissa J. Estrich, CRPS®
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Shane Ewbank, CPWA®, CRPC®, CRPS®
Merrill Lynch

Craig D. Findley, CPWA®
Venture Visionary Partners

Brady Fineske, CFP®
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Savage and Associates, Inc.

Michael Ray Foster
Wells Fargo Advisors, LLC

Brian J. Funkhouser, CRPS®, CRPC®
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Thomas J. Gagnet
Touchstone Wealth Partners / UBS

Neil C. Garrison
Garrison Financial, LLC

Troy A. Greeley
Wells Fargo Advisors, LLC

Wendy Lamberg Greeley
Merrill Lynch

Jerry Hahn, CFP®
Baird

James Carl Happ
Merrill Lynch

Ann Hartmann, MBA, AEP®, CLU®, ChFC®
Hartmann & Associates

Chris Heerdegen, CFBS®
Skylight Financial Group

Jim Herrick, CFP®
TDC Investment Advisory

Carleton “Holly” Hollister
Savage and Associates, Inc.

Michael Holly
Charles Schwab

Callie Jacoby, CFP®
PNC Wealth Management

Chris Jakyma, JD, CTFA®, AEP®
State Bank

Holly Christine Jensen
Prospera Financial Services

Bob Jesionowski
Wells Fargo Advisors, LLC

Philip Johnson, CLU®
Savage and Associates, Inc.

Marcus William Jones
Wells Fargo Advisors, LLC

Craig Joseph
Equity Planning Group

Bill Kanary
Savage and Associates, Inc.

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KMG Fiduciary Partners, LLC

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Merrill Lynch

Tyler R. McKean, AWMA®
Touchstone Wealth Partners / UBS

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KMG Fiduciary Partners, LLC

John V. Melick III
Baird

Patrick John Mollenkamp
Merrill Lynch

Tyson A. Moore
Transamerica Financial Advisors

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Camelot Portfolios, LLC

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Munn Wealth Management

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Premier Wealth Management Group

Miles O'Mailia
Patton Wealth Management

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Edward Jones

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Patton Wealth Management

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Merrill Lynch

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PNC Wealth Management

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Lehner Carroll Shope Capital Management

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America's Retirement Headquarters

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Wells Fargo Advisors, LLC

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