

COLUMBUS BUSINESS FIRST

THE LIST

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FINANCIAL PLANNERS - FEE ONLY RANKED BY ASSETS UNDER MANAGEMENT BY LOCAL PLANNERS

Business name/prior rank ¹ Website	Address Phone	Assets managed, 2017	Certified financial planners ²	Minimum portfolio, individual ³	Minimum portfolio, non-individual ³	Services provided (may be partial list) ³	Main brokerage firm used ³	Headquarters locality	Year founded locally	Top local executive ⁴
1 Budros Ruhl & Roe Inc. ^① b-r-r.com	1801 Watermark Dr #300 Columbus, OH 43215 614-481-6900	\$2.57 billion	19	\$500,000	\$500,000	Wealth management; investment management; retirement plan investment services; divorce planning and consulting	Schwab Institutional	Columbus, OH	1979	Peggy Ruhl, pruhl@b-r-r.com
2 Hamilton Capital Management Inc. ^② hamiltoncapital.com	5025 Arlington Centre Blvd. Columbus, OH 43220 614-273-1000	\$2.31 billion	28	\$250,000	\$250,000	Investment management for individuals and institutional investors; wealth management; 401(k) and retirement plans	Charles Schwab	Columbus, OH	1997	Matthew Hamilton, mhamilton@hamiltoncapital.com
3 Summit Financial Strategies Inc. ^③ summitfin.com	7965 N. High St. #350 Columbus, OH 43235 614-885-1115	\$1.19 billion	19	NA	NA	NA	Schwab, Fidelity	Columbus, OH	1995	Samantha Macchia, samantha_macchia@summitfin.com Liam Hurley, liam.hurley@summitfin.com Brian Sutliff, brian.sutliff@summitfin.com
4 Johnson Investment Counsel ^④ johnsoninv.com	100 E. Broad St. #2300 Columbus, OH 43215 614-365-9103	\$947.1 million	2	\$1 million	\$1 million	Fee-only wealth management services; investment management; retirement; estate planning; tax planning; trust services; institutional investment management services	NA	Cincinnati, OH	1987	Dan Gusty, dgusty@johnsoninv.com Michelle Strub, mstrub@johnsoninv.com
5 Meyers Wealth Management ^⑤ meyerswealthmgmt.com	4100 Horizons Dr. #101 Columbus, OH 43220 614-442-6787	\$754.5 million	3	\$250,000	\$250,000	Investment management; financial planning	Charles Schwab	Columbus, OH	1999	Matthew Meyers, matthewmeyerswealthmgmt.com Robert Meyers, robert@meyerswealthmgmt.com
6 John E. Sestina and Co. ^⑥ managingtobwealthy.com	1161 Bethel Rd. #201 Columbus, OH 43220 614-326-3077	\$635.43 million	9	\$0	NA	Comprehensive fee-only financial planning and investment management	TD Ameritrade, Charles Schwab, FTJ FundChoice	Columbus, OH	1970	Stephen Lukan Tyrer Cook
7 WealthStone ^⑦ wealthstone.net	5000 Horizons Dr. Columbus, OH 43220 614-267-2600	\$635.1 million	8	\$500,000	\$500,000	Financial planning; investment management; taxes; business consulting; life insurance	Charles Schwab	Columbus, OH	1977	James Wylan, jwylan@wealthstone.net Paul Breen, pbreen@wealthstone.net
8 PDS Planning Inc. ^⑧ pdsplanning.com	2200 W. 5th Ave. #200 Columbus, OH 43215 614-481-8449	\$585 million	4	\$0	\$0	Comprehensive financial planners	Schwab Institutional	Columbus, OH	1985	Rita Itsel, ritisel@pdsplanning.com Jamie Menges, jmenges@pdsplanning.com Kurt Brown, kbrown@pdsplanning.com
9 Joseph Group Capital Management ^⑨ josephgroup.com	300 Marconi Blvd. #106 Columbus, OH 43215 614-228-4300	\$541.14 million	5	\$500,000	\$500,000	Investment advisory and financial planning services for professionals, retired persons, business owners, trusts, endowments and employer sponsored retirement plans	Charles Schwab & Co.	Columbus, OH	1999	Mark Palmer, mark.palmer@josephgroup.com Matthew Palmer, matt.palmer@josephgroup.com Travis Upton, travis.upton@josephgroup.com
10 Waller Financial Planning Group Inc. ^⑩ waller.com	941 Chatham Ln. #212 Columbus, OH 43221 614-457-7076	\$402.91 million	5	NA	NA	Financial planning; investment management; tax planning; philanthropic planning	TD Ameritrade	Columbus, OH	1985	Jason Eliason, jeliason@waller.com Jason Farris, jfarris@waller.com Christopher Disgard, cdisgard@waller.com
11 First Ohio Planning LLC ^⑪ firstohioplanning.com	1429 King Ave. Columbus, OH 43212 614-486-0691	\$330.81 million	3	\$5,000	\$1 million	Fee only financial planning and investment advice, company-sponsored retirement plan consulting; life, disability, long term care insurance consulting; core benefit enrollment and voluntary benefit consulting	Charles Schwab	Columbus, OH	1979	James Ryan, jryan@firstohioplanning.com
12 Trinity Financial Advisors LLC ^⑫ trinityadvisors.com	7102 Communications Pkwy. #200 Columbus, OH 43214 614-849-7667	\$208.94 million	1	\$500,000	\$500,000	Investment management; retirement and financial planning; charitable giving strategies	Charles Schwab & Co.	Columbus, OH	2005	Geoffrey Blehn, gblehn@trinityadvisors.com
13 Vawter Financial ^⑬ vawterfinancial.com	1161 Bethel Rd. #304 Columbus, OH 43220 614-451-1002	\$162.3 million	2	\$500,000	\$500,000	Wealth management advisory firm	TD Ameritrade	Columbus, OH	1991	Gary Vawter, garyvawterfinancial.com
14 Fullen Financial Group Inc. ^⑭ fullenfinancial.com	3720 N. High St. Columbus, OH 43214 614-946-6052	\$128.42 million	3	NA	NA	Financial planning; investment management	TD Ameritrade Institutional	Columbus, OH	2004	Milton Fullen, milt@fullenfinancial.com
15 Demers Financial Planning ^⑮ demersfinancial.com	2935 Kenny Rd. #135 Columbus, OH 43221 614-451-4505	\$100.74 million	1	\$500,000	NA	Investment management, tax and cashflow planning, disability planning, estate planning and retirement planning	Fidelity Investments	Columbus, OH	1994	Connie Demers, dfp@erohio.com
16 Nvest Wealth Strategies Inc. ^⑯ nvestwealth.com	10268 Sawmill Pkwy. Powell, OH 43065 614-389-4646	\$79.5 million	2	\$250,000	\$250,000	Investment management; financial planning; retirement planning	Charles Schwab & Company Inc.	Powell, OH	2006	William Henderly
17 Lynch Financial Group LLC ^⑰ lynchfinancialgroup.com	5880 Sawmill Rd. #204 Dublin, OH 43017 614-791-8884	\$76.79 million	2	\$500,000	\$500,000	Wealth management services including investment management and financial planning	Charles Schwab	Dublin, OH	1989	John Lynch, jlynch@lynchfinancialgroup.com Douglas Lynch, dlynch@lynchfinancialgroup.com
18 Libertas Wealth Management Group Inc. ^⑱ libertaswealth.com	5003 Horizons Dr. #200 Columbus, OH 43220 614-543-1350	\$58.9 million	1	\$250,000	\$750,000	Portfolio management; financial planning; estate planning	TD Ameritrade Institutional	Columbus, OH	2004	Adam Kooz, akooz@libertaswm.com
19 Alexander Financial Planning Inc. ^⑲ alexanderfinancialplanning.com	1621 W. 1st Ave. Grandview Heights, OH 43212 614-538-1600	\$50.3 million	1	\$0	\$0	Comprehensive life financial planning and asset management	TD Ameritrade	Columbus, OH	1997	Teri Beth Alexander, talalexander@afp-advisors.com
20 Alpha Financial ^⑳ alphafinancial.com	6241 Riverside Dr. Dublin, OH 43017 614-384-0499	\$49.35 million	3	\$1	\$1	Financial planning, 401k plan management and implementation for small businesses	Charles Schwab	Dublin, OH	2012	Steve McElroy, steve@alphafinancial.com
21 Beacon Hill Investment Advisory ^㉑ beaconhilladvisory.com	84 S. 4th St. Columbus, OH 43215 614-469-4685	\$42.71 million	3	\$400,000	\$400,000	NA	TD Ameritrade	Columbus, OH	2008	Clint Edgington, clint@bhadvisory.com Mark Fissel, mark@bhadvisory.com
22 Hawk100 ^㉒ hawk100.com	6600 Perimeter Dr. #200 Dublin, OH 43016 614-791-4295	\$17 million	1	NA	NA	Hawk100 helps individuals and families align wealth with life	TD Ameritrade	Dublin, OH	2004	Richard Clemens

¹ * -Not ranked last year (applies to Print List only).
² NA -Not answered or not applicable.

³ NA -Not answered.
⁴ May be partial list due to space considerations.